Energy Trust Draft 2013 Budget

CAC Presentation

October 24, 2012

EnergyTrust of Oregon

2013 Draft NW Natural Industrial, firm and interruptible, Program Budgets

	2012 Net Therms Forecast	2013 Net Therms	Gas Cost ($ million)
Existing Buildings	314,580	105,835	$ 0.5
New Buildings	-	-	-
Production Efficiency	766,675	752,008	2.1
Existing Homes	-	-	-
New Homes and Products	-	-	-
Program	1,081,255	857,843	$ 2.6

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2013 Draft NW Natural Program Budgets & Net Savings

	2012 Net Therms Forecast	2013 Net Therms	Gas Cost ($ million)
Existing Buildings	1,389,668	1,107,518	$ 5.3
New Buildings	496,848	425,934	1.1
Production Efficiency	195,741	264,132	0.8
Existing Homes	1,607,426	1,170,767	10.5
New Homes and Products	725,484	823,092	3.6
Program	4,415,167	3,791,444	$ 21.3

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2013 Draft Cascade Natural Gas Program Budgets & Net Savings

	2012 Net Therms (Forecast)	2013 Net Therms	Gas Cost ($ million)
Existing Buildings	104,944	132,956	$ .7
New Buildings	40,367	32,856	.1
Production Efficiency	126,854	126,400	.4
Existing Homes	86,575	72,047	.9
New Homes and Products	66,705	65,273	.4
Program	425,445	429,533	$ 2.5

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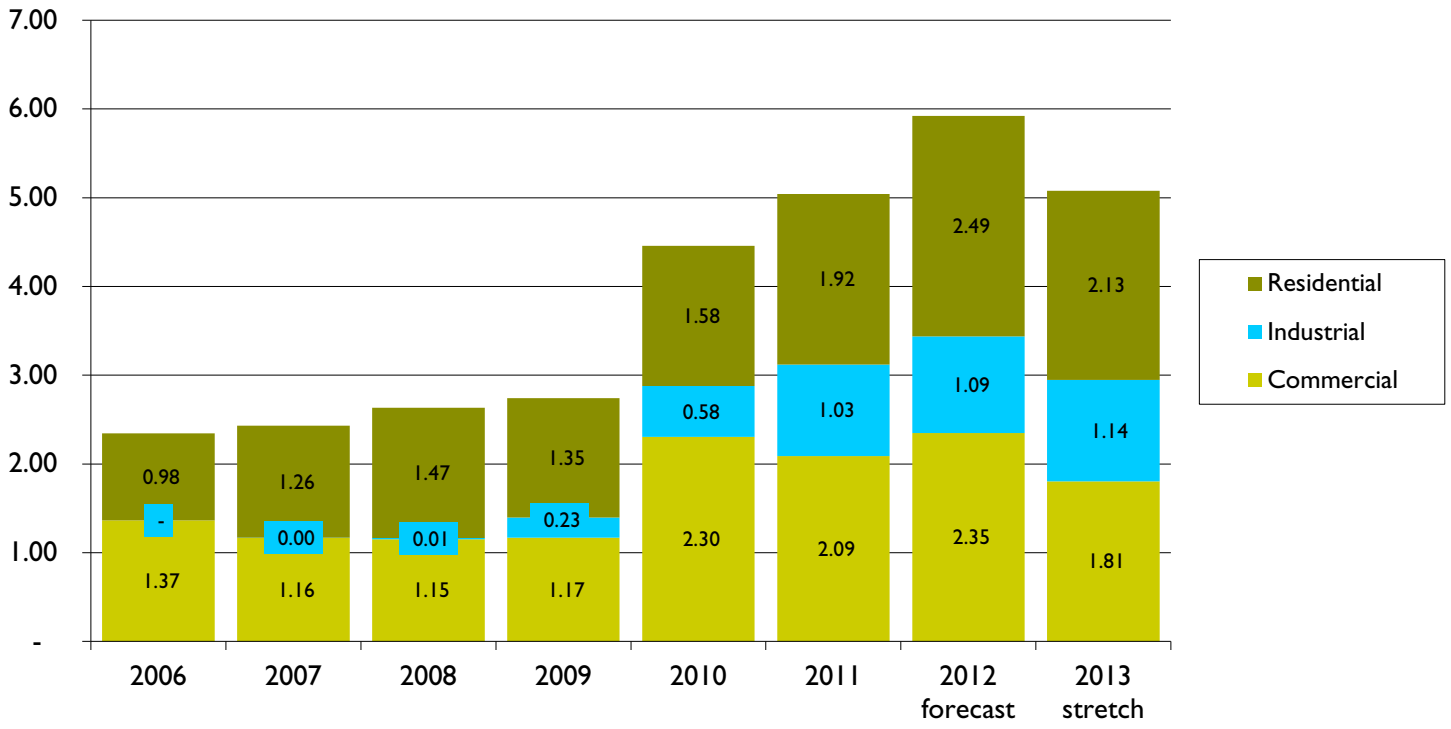
2013 Draft Gas Net Savings by Sector (millions of therms)



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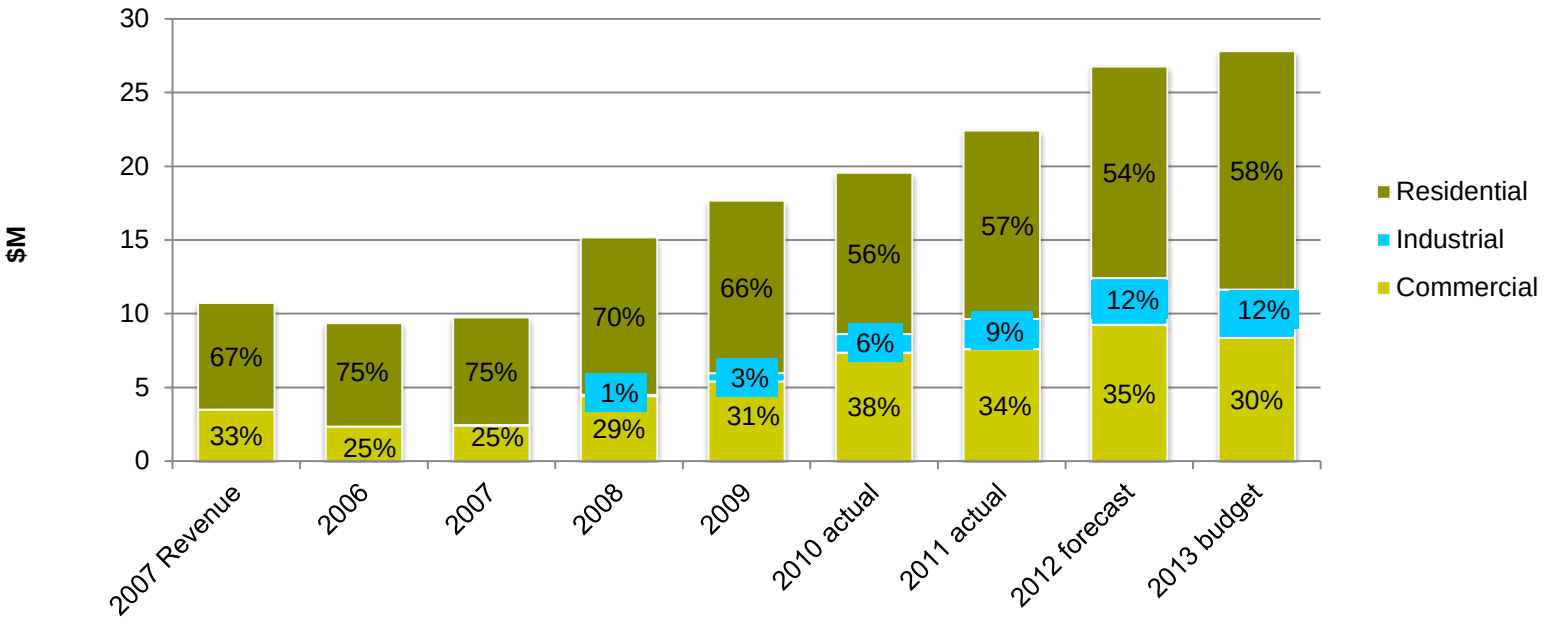
2013 Draft Gas Spending by Sector



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2013 Draft Gas Program Budgets & Net Savings

	2012 Forecast Net Therms	2013 Net Therms	Gas Cost ($ millions)
Existing Buildings	1,809,192	1,346,309	$ 6.5
New Buildings	537,215	458,790	1.2
Production Efficiency	1,089,270	1,142,540	3.3
Existing Homes	1,694,001	1,242,914	11.4
New Homes and Products	792,189	888,366	4.0
Program	5,921,867	5,078,820	$ 26.4

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2013 Draft PGE Program Budgets & Net Savings

	2012 Forecast Net aMW	2013 Net aMW	2013 Electric cost ($ millions)
Existing Buildings	8.5	10.2	$ 24.7
New Buildings	3.0	3.0	8.6
Production Efficiency	8.2	10.8	19.6
Existing Homes	4.3	3.9	9.6
New Homes and Products	3.5	3.9	10.9
NEEA - combined	2.8	3.2	5.6
Program	30.3	35.0	$ 79.0

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2013 Draft Pacific Power Program Budgets & Net Savings

	2012 Forecast Net aMW	2013 Net aMW	2013 Electric cost ($ millions)
Existing Buildings	4.7	4.5	$ 12.0
New Buildings	3.4	2.7	7.4
Production Efficiency	5.8	5.7	11.6
Existing Homes	2.0	2.2	6.5
New Homes and Products	2.2	2.5	6.4
NEEA - combined	2.1	2.3	3.9
Program	20.2	19.9	$ 47.8

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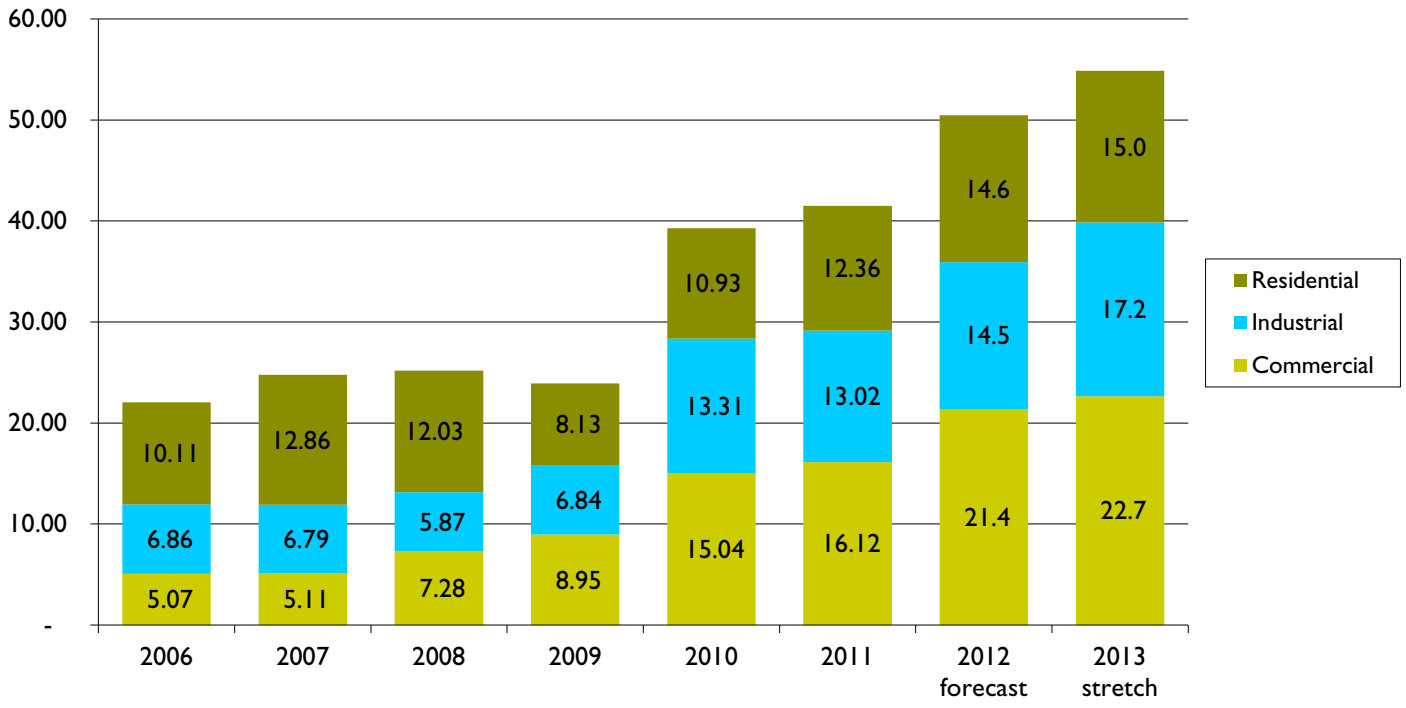
2013 Draft Electric Net Savings by Sector



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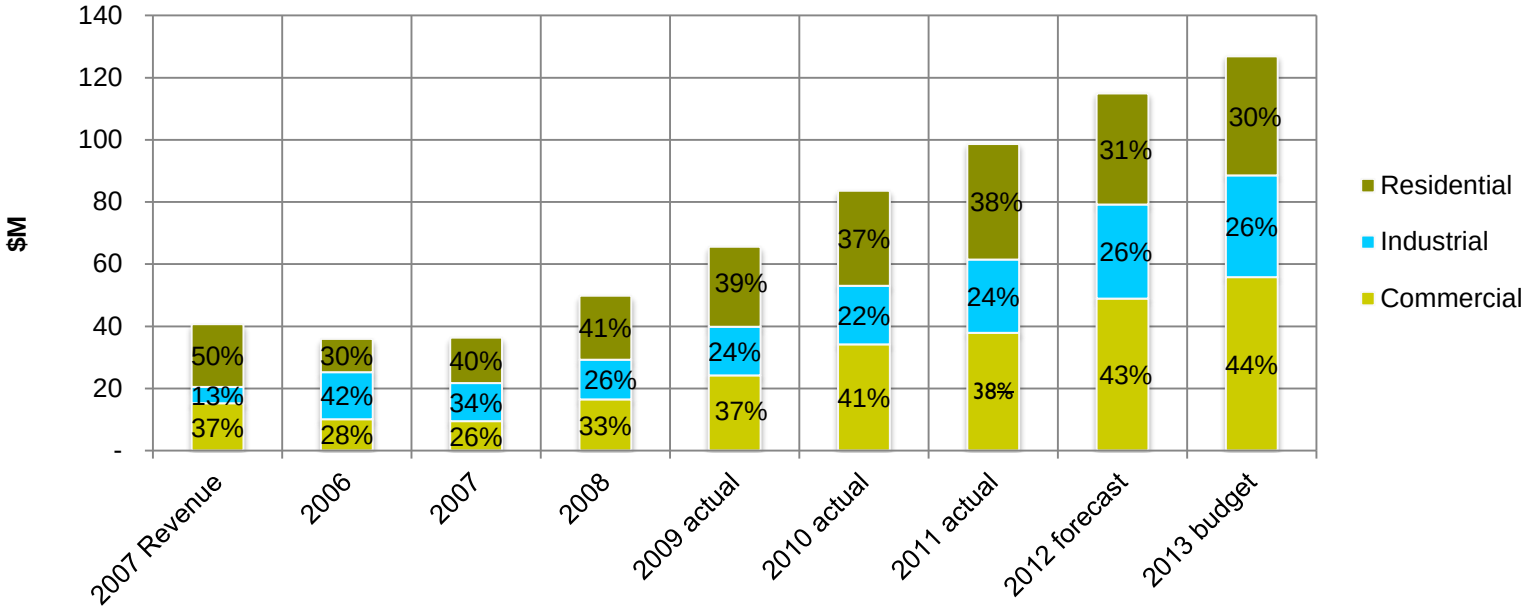
2013 Draft Electric Spending by Sector



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2013 Draft Electric Program Budgets & Net Savings

	2012 Forecast Net aMW	2013 Net aMW	2013 Electric cost ($ millions)
Existing Buildings	13.1	14.7	$ 36.7
New Buildings	6.5	5.7	16.0
Production Efficiency	14.1	16.5	31.2
Existing Homes	6.2	6.1	16.1
New Homes and Products	5.8	6.3	17.3
NEEA - combined	4.9	5.5	9.5
Program	50.6	54.8	$ 126.8

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Industrial Program Focus

- Standard offerings:
  - Custom projects: capital and O&M
  - Trade ally tracks: lighting and SI calculated/prescriptive measures
  - SEM: solo (corporate SEM), peer cohorts (IEI), SEM Maintenance
  - Refrigerator Operator Coaching
- Lighting
  - retrofit push for T12 to T8/5 conversion
  - comprehensive lighting design pilot launched (4 Pac participants)
- ISO 50001 pilot launched
- Small Industrial SEM pilot launched (CORE initiative)
- Wastewater treatment plants
  - Standard tracks
  - EE and RE roadmap and SEM training with OR ACWA
- Agriculture
  - Standard tracks, and
    - Scientific Irrigation Scheduling
    - Nurseries
- RFP for program delivery services for custom track elements of the program

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Industrial Program Objectives & Strategies

- Meet or exceed savings and cost-effectiveness goals
- Achieve high technical realization of savings for projects
- Increase participation by smaller industrial and agricultural businesses
- Keep what's working.
  - Minimize changes to current, successful program services, strategies, and base incentive levels for custom, calculated and prescriptive measures.
  - Further develop and deploy Strategic Energy Management
  - Utilize PDCs as energy efficiency "account managers" for industrial customers.
  - Enable investment decision-making and reduce risk of poor project performance by providing services of 3rd party technical experts
- Cultivate a learning community of industrial energy champions
- Coordinate with existing and emerging market players
  - to increase volume and decrease development and engineering cycle of industrial efficiency projects

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Commercial Program Focus

- Strategic Energy management
- Existing Multifamily
  - ISMs through direct installs
  - Expanded offerings to add custom track (primarily gas)
  - Midstream clothes washer initiative
  - Midstream refrigerator initiative planned in July
  - Memory care/assisted living pilot underway
- Reframing the business case
  - Training for Existing Buildings and New Buildings outreach teams, ATACs and trade allies
- Pilots:
  - Comprehensive lighting design
  - PTNZ pilot in concluding phases
  - MPower financing path for public housing
  - Tenant Behavior Pilot in development
- RFP for PMC services for the New Buildings Program

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Commercial Program Focus

- Standard offerings: Existing Buildings and New Buildings
  - Custom, prescriptive, lighting and O&M Tracks
  - 80 Plus upstream electronics incentive
  - Building Operator Certification
  - Rooftop tune-ups
- Lighting
  - Retrofit push for T12 to T8/5 conversion
  - Lighting design pilot
  - Limited prescriptive LED measures.
- New Buildings:
  - Custom and prescriptive tracks
  - Design and technical assistance
  - Code compliance
  - Small commercial prescriptive and packaged offerings
  - Data center tiered offerings launched
  - Lighting design track
- Schools
  - With ODOE marketing and recruiting, provide services and/or incentives for Cool Schools

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Commercial Program Objectives & Strategies

- Accelerate energy efficiency investments by customers through incentives, technical assistance and project support
- Provide support for greater market adoption of new cost- effective technologies such as LEDs.
- Offer streamlined approaches such as the new tracks for Small Commercial New Construction and Data Centers .
- Support offerings that require minimal up-front investment, such as direct install, behavioral savings, or operations and maintenance measures
- Expand Strategic Energy Management offerings to institutionalize strategies and policies to capture these savings.
- Utilize more targeted efforts and offerings such as rooftop tune-ups, steam traps at schools and parking-lot lighting.
- Support market transformation efforts in new buildings and deep retrofits
- Expand offerings for multifamily, including efforts to directly engage tenants

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Residential Program Focus

- Enhanced Trade Ally tools & engagement
  - On-line electronic forms for Trade Allies
  - Contractor portals
  - Trade Ally development fund
  - Market-based trainings
- Real Estate Allies Channel
- Products
  - Higher tiers for clothes washers and refrigerators
  - Continued freezer/refrigerator retirement
  - Expanded retailers for specialty bulbs
  - Market lift strategy
- Pilots
  - Ideas 42 (MIT Pilot—customer engagement treatment strategies)
  - Prescriptive Duct and Air Sealing
  - New Homes Air Sealing
  - Behavioral
    - OPOWER persistence test for PGE and NWN
    - OPOWER electric-only test with Pacific for high-users
    - Aclara test with PGE
  - Heat pump advanced controls
  - Cold water detergent
  - Heat pump waters heater through NEEA

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Residential Program Focus

- Standard single family prescriptive measures
  - Modifications to address avoided cost declines and evaluations
  - Key Products' strategy focus on driving market influence on
    - Fireplaces
    - Ductless heat Pumps
    - Energy Star tank water heaters (.67)
    - Insulation
    - Solar water heating
- EPS: expansion to delivery with most Home Performance projects
- Enhanced customer engagement
  - Single call to action
  - Home Energy Review delivered online, by phone or in person
  - Option for direct contractor referral and follow up (re)engagement sequence
- Home Performance with ENERGY STAR
  - CEWO and standard HP tracks
- Savings Within Reach moderate income track & loan product

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Residential Program Objectives & Strategies

- Increase number and market share of efficient new homes.
- Reach over 17,000 single-family households.
- Transition 20% of the kWh savings through CFLs in 2013 and 50% of the kWh savings in 2014 to new measures and approaches.
- Develop additional ways to motivate customers to make energy-efficient product choices beyond financial incentives.
- Ensure under-served populations (i.e. rural communities, lower income) have easy access to offerings and financing.
- Leverage residential market actors and industry stakeholders to coordinate efforts, minimize market confusion and maximize cost-effectiveness.
- Provide simple data collection protocols and resources and eliminate complex energy modeling to decrease the amount of time spent in the home.
- Streamline incentive processing and bring tools for use by trade ally contractors that enhance the way they do business.
- Conduct outreach to new retailers to encourage increased number of participating stores throughout region.

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2013 Budget Themes

- Remain flexible to market conditions
- Manage costs and cost effectiveness
  - Tighter cost constraints
  - Address new avoided costs
- Support Trade Allies and Customers
- Maintain a diversified portfolio of
  - programs, measures and offerings, for a wider variety of market segments, customers, and project types
- Support offers separate from state tax credits
- Manage to potential new IRP plateaus

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ETO Five-Year Strategic Plan Activities

- Accelerate activity
- Increase customer service
- Encourage innovation
- Balance investments in budgets and actions
- Support businesses and industry
- Communicate the value of efficiency and renewables
- Be efficient and transparent

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Next Steps

- Process same as last year
- This begins the review phase
  - Initial review by 11/2
    - On the web:
      - Program and utility specific data
      - Program strategies and design
      - Budget themes
  - Board review on 11/07
  - CAC on 11/28 for revised
- Looking for comments and feedback
  - Program plans
  - Budget allocations
  - Savings estimates
- Final Board approval 12/14

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