2013-2014 DRAFT BUDGET & ACTION PLAN

Acquire cost-effective energy, accelerate investment, innovate, be accessible and transparent, communicate value, focus on customers.

EnergyTrust of Oregon

Commercial

Existing Buildings

Program Purpose: Acquire cost-effective electric and natural gas savings by providing technical assistance and financial incentives for high-efficiency equipment and energy efficient operating practices in existing commercial facilities.

2013 Strategies & Activities

1. Deliver program to commercial entities through Program Management Contractor (ICF), subcontractors and a statewide comprehensive network of trade allies.
2. Continue to focus on delivering tailored program services to the entire value chain of target markets from business owners, property owners, tenants, property management companies, service providers, electrical/mechanical contractors, distributors, manufacturer representatives and manufacturers.
3. Provide offerings and services that appeal to a wide-range of participants, including 16 key market sectors.
4. Maintain the state-wide program reach, while looking for opportunities to reach customers in under-participating areas.
5. Modify Trade Ally approach to increase non-lighting project activity in addition to historical lighting focus. Develop approaches for Trade Allies to sell lighting and non-lighting measures concurrently.
6. Evolve lighting program offerings to adapt to changing lighting baselines associated with market transformation effects and federal lighting standards.
7. Adapt to reduced Gas Avoided Costs to provide cost-effective gas savings measures, providing more services as necessary to aid the customer's decision making and redefining recommendations to limit measures on the margin.
8. Increase operations-based savings and low-cost/no-cost approaches to save energy as a means to expand the ways to engage customers or provide energy savings options for the capital constrained customer.
9. Build and leverage long-term relationships to help customers implement energy savings strategies over time.
10. Explore options to streamline certain program requirements including compressing processes and paperwork in order to speed participation and provide more direct access to program experts via a dedicated call center.
11. Increase awareness and visibility throughout the state by expanding geographic presence with statewide field staff to promote program with Customers and Trade Allies.
12. Develop marketing strategies to address key barriers to action, including but not limited to customer success stories, demonstration of the business case for energy efficiency.

2013 New Initiatives & Focus Areas

1. Expand market education on the pending Federal 2014 lighting ballast standard and provide incentives to encourage participants to convert T12s to T8s.
2. Review results of the Comprehensive Lighting Pilot to see if the market is becoming educated on better lighting design and, if appropriate incorporate into steady-state program offerings.
3. Review results of Building Performance Tracking and Control Systems pilot to review efficacy of using building information systems to encourage operational improvements and if appropriate modify to be a regular program offering.
4. Provide incentives for technically sound and cost-effective LED applications.
5. Expand both aspects of the Strategic Energy Management pilot by: 1) Enrolling 15 participants in the commercial energy improvement approach 2) Enrolling 3 large chain customers to the individual integrated energy management track.
6. Work with other efficiency organizations to achieve regional economies to reduce product costs and ensure supply.
7. Use incentives, services and sales techniques to encourage customers to install more measures in a shorter time frame.
8. Manage Roof-top Tune-up projects to deliver cost-effective electric and gas savings.
9. Continue to coordinate with ODOE to identify and study Cool Schools projects in Energy Trust service territory.
10. Coordinate with NEEA and other NEEA utility funders to leverage regional lighting coordination opportunities like upstream buy-downs and contractor training.
11. Coordinate with electric utility field and outreach representatives and marketing efforts to recruit and screen new leads.
12. Multifamily Strategies and Activities and New Initiatives and Focus Areas presented in a separate Action Plan.

2014 Planned Activities

1. Revise lighting program to account for new baseline from Federal 2014 lighting ballast standards.
2. Continue to expand the emphasis on operations and strategic energy planning.

Nov 2012

2013-2014 DRAFT BUDGET & ACTION PLAN

Acquire cost-effective energy, accelerate investment, innovate, be accessible and transparent, communicate value, focus on customers.

EnergyTrust of Oregon

Targets

	Annual Expense			Electric Savings				Gas Savings			
				Goal		Levelized Cost		Goal		Levelized Cost	
	($M)			aMW		($/kWh)		Therms		($/therm)	
Year	Electric	Gas	Total	Conserv	Stretch	Conserv	Stretch	Conserv	Stretch	Conserv	Stretch
2012 Forecast	$33.4	$6.9	$40.3	13.08		$0.031		1,809,192		$0.322	
2013 Budget	$36.7	$6.5	$43.2	12.47	14.67	$0.038	$0.033	1,144,363	1,346,309	$0.570	$0.485

The Energy Trust of Oregon, Inc
2013 Draft Budget
Existing Buildings

	2012 Forecast	2013 Budget
Incentives	**$25,221,421**	**$27,227,630**
Delivery Costs		
Program Management	602,731	261,763
Program Delivery	9,357,602	10,489,600
Marketing-PMC	497,012	
Performance Comp	308,500	215,000
Total Delivery Costs	**10,765,844**	**10,966,363**
ETO expenses		
Staffing	496,350	652,651
Marketing	189,500	247,500
Other Services	1,222,797	1,213,640
General	41,256	47,500
Allocations	1,115,744	1,402,454
Sub-Total before Admin Costs	**39,052,912**	**41,757,739**
Administrative Costs	1,285,222	1,432,388
TOTAL EXPENSE	**40,338,134**	**43,190,127**

2013-2014 DRAFT ACTION PLAN

Acquire cost-effective energy, accelerate investment, innovate, be accessible and transparent, communicate value, focus on customers.

EnergyTrust of Oregon

Commercial

Existing Multifamily

Program Purpose: Acquire cost-effective electric and natural gas savings by providing technical assistance and financial incentives for high-efficiency equipment and energy efficient operating practices in existing multifamily (2+ attached units, retirement and campus living) facilities.

2013 Strategies & Activities

1. Deliver program to multifamily entities through Program Management Contractor (LM), subcontractors and a statewide network of trade allies specializing in this market.
2. Develop and include offerings and initiatives that will involve multifamily tenants in the savings decision and overcome the split incentive dilemma.
3. Continue to focus on delivering tailored program services to the entire value chain of target markets from property owners, tenants, property management companies, service providers, electrical/mechanical contractors, distributors, manufacturer representatives and manufacturers.
4. Provide offerings and services that appeal to a broad mix of multifamily owners and managers.
5. Expand program throughout the state to reach new customers and go deeper with existing customers in all four utility service territories.
6. Collaborate across New Buildings, Existing Homes and Existing Buildings to maximize program effectiveness in the marketplace.
7. Build and develop a project pipeline that can utilize either the on-bill financing option through the MPower Oregon pilot or through normal program tracks.
8. Leverage learning's from custom track projects and audits to redesign the services and offerings to better fit the needs of multifamily owners and managers.
9. Continue the distributor buy-downs focused on suppliers of energy efficient clothes washers and refrigerators in order to competitively place equipment in replacement applications.
10. Enhance outreach focus to promote project activity including selling lighting and non-lighting measures concurrently.
11. Launch seasonal and special "limited time only" bonuses for specific technologies to increase penetration or introduce successful but yet to be adopted technologies.
12. Increase operations-based savings and low-cost/no-cost approaches to save energy in a capital constrained market.
13. Build and leverage long-term relationships to help established customers implement energy savings strategies over time and across multiple capital budget cycles.
14. Develop marketing approaches that use customer success stories to demonstrate the strong business case for energy efficiency as a means to help spur action from more property managers.

2013 New Initiatives & Focus Areas

1. Extend the program offerings and the "single point of contact" outreach approach to small multifamily properties and campus living facilities through 2013 integration of these building types into Existing Multifamily.
2. Work with the affordable housing community to innovate how the program can serve their tenants through partnership in a financing pilot, behavioral opportunities and capital investments.
3. Continue implementation of the Memory Care Comprehensive Lighting Pilot to develop a cost and savings baseline for this facility type, test the effectiveness of a template approach on meeting the Oregon regulations for Memory Care Communities, characterize the non-energy benefits of advanced lighting design and, if appropriate incorporate into steady-state program offerings.
4. Implement a comprehensive overhaul of existing website structure and content to provide a "one-stop shop" for all multifamily properties in order to eliminate mixed messaging and confusion as a result of previous program design.
5. Integrate enhanced sales approach and benchmarking tools in order to provide comprehensive and actionable information on opportunities within customer portfolios
6. Consider a test that embeds a Resource Conservation Manager in affordable multifamily property management organizations to assess and implement energy efficiency resources in public institutions.
7. Collaborate with other energy efficiency implementation organizations to achieve regional economies to ensure satisfactory customer service, support pilot initiatives, reduce project costs and gain organizational efficiencies.
8. Coordinate with electric utility and water utility field and outreach representatives on marketing efforts to recruit and screen new leads and promote energy efficiency.

9. Expand market education on the pending Federal 2014 lighting ballast standard and provide incentives to encourage participants to convert T12s to T8s.

2014 Planned Activities

1. Evaluate progress and lessons learned from Phase I and II of MPower Oregon Pilot and move forward on tenant metered properties only if appropriate.
2. Revise lighting program to account for new baseline from Federal 2014 lighting ballast standards.
3. Continue to expand the emphasis on affordable housing and within the general multifamily market for operations and strategic energy planning opportunities.

Targets - Multi-family program costs and energy savings tables are included in the Existing Buildings summary

2013-2014 PROPOSED FINAL BUDGET & ACTION PLAN

Acquire cost-effective energy, accelerate investment, innovate, be accessible and transparent, communicate value, focus on customers.

EnergyTrust of Oregon

Business Energy Solutions- New Buildings

Commercial

Program Purpose: Acquire cost-effective electric and natural gas savings by providing technical assistance and financial incentives for high-efficiency design and equipment in commercial and industrial new construction and major renovation projects.

2013 Strategies & Activities

1. New Buildings will continue to position itself as a technical and educational resource in the market, focus on influencing market transformation.
    a. Expand support of early design meetings with project teams to identify energy saving strategies and make the business case for achieving efficiency goals directly to owners.
    b. Enhance engineering support for modeled projects in development with the objective of identifying opportunities to design beyond code and influence decisions.
    c. Maximize market transformation savings expected to result from the shift in 2007 code to 2010 code by helping projects to comply with code and claim a portion of savings in collaboration with NEEA's work. Implement tiered incentives to reward whole-building, cost-effective efficiency.
    d. Develop new educational resources to increase the market's ability to identify and achieve savings.
2. Target the small commercial market with simple solutions.
    a. Deploy new offers – called Market Solutions – that are building type-specific and offer projects simpler, pre-calculate, packaged options to drive quick decision making. This stems from results of the successful Small Commercial Efficiency Pilot launched in 2009.
    b. Continue providing a broad array of over 100 standard measures that are trade ally driven.
3. Build on an effective strategy to create a market position for New Building Allies that actively support efficiency and are critical to New Buildings' success in transforming the market.
    a. Focus on the allies' influence on practical elements of integrated design, system selection and critical decisions that affect the efficiency of a project.
    b. Launch a formal training series to bridge practical strategies for designing energy savings to implementation and getting buy-in from building owners.
4. Prepare for the 2013 code cycle and the Reach code, currently a voluntary code expected to be adopted into the next code cycle by the state Building Codes Division.
    a. Adopt any measure changes related to the 2013 Oregon Energy Efficiency Code expected to be published in Q2 or Q3 of 2013.
    b. Collaborate with NEEA to support the Oregon Reach Code.
5. Streamline efforts to increasing the number of solar installations in New Buildings projects, and support the launch of a Solar Ready design option to build a pipeline of future projects.

2014 New Initiatives & Focus Areas

1. Continued focus on small commercial market opportunities.
    a. Expand the packaged approaches for target market segments that face challenges with exceeding code, including small commercial and multifamily.
2. Continue to innovate and build on the success with the Path to Net Zero pilot.
    a. Fine tune program design to remove barriers experienced by far-reaching projects.
    b. Encourage projects to pursue leading edge design strategies or technologies where risk perceptions are a barrier to achieving deep energy savings.
    c. Continue to engage potential net zero and net zero ready projects through targeted outreach, goal-setting, and directed participation.
3. Simplify the program process using a variety of tools including web-based capabilities to support processing.
4. Connect customers with additional financial resources and the Lending Ally network to push innovative financing approaches forward that could reduce financial barriers to participation and boost aggressive savings targets.
5. Position New Buildings to capture additional market transformation savings and adjust to the new code.
6. Engage trade allies to improve code compliance in preparation for the new 2013 code, which may align with the Reach.

2014 Planned Activities

1. Continue building the pipeline and support for 2013 Oregon Energy Efficiency Specialty Code in addition to adoption of the Reach code.
2. Offer incentives and engineering support to reward increasing energy efficiency in excess of 2010 code update.
3. Leverage our emerging delivery network of New Buildings Program Allies to drive projects that exceed code.

(See budget detail on reverse side)

2013-2014 PROPOSED FINAL BUDGET & ACTION PLAN

Acquire cost-effective energy, accelerate investment, innovate, be accessible and transparent, communicate value, focus on customers.

EnergyTrust of Oregon

Targets

	Annual Expense			Electric Savings				Gas Savings			
				Goal		Levelized Cost		Goal		Levelized Cost	
	($M)			aMW		($/kWh)		Therms		($/therm)	
Year	Electric	Gas	Total	Conserv	Stretch	v	Stretch	Conserv	Stretch	Conserv	Stretch
2012 Forecast	$12.7	$1.8	$14.5	6.45		$0.020		537,215		$0.285	
2013 Budget	$16.0	$1.2	$17.3	4.86	5.72	$0.038	$0.032	389,972	458,790	$0.266	$0.226

The Energy Trust of Oregon, Inc
2013 Draft Budget
New Buildings

	2012 Forecast	2013 Budget
Incentives	**$7,738,872**	**$10,148,039**
Delivery Costs		
Program Management	180,828	222,494
Program Delivery	4,316,059	4,094,101
Marketing-PMC	149,173	249,465
Performance Comp	185,000	120,000
Total Delivery Costs	**4,831,059**	**4,686,060**
ETO expenses		
Staffing	352,201	322,741
Marketing	102,000	112,500
Other Services	369,390	700,890
General	31,642	15,000
Allocations	545,550	688,777
Sub-Total before Admin Costs	**13,970,714**	**16,674,007**
Administrative Costs	516,133	607,995
TOTAL EXPENSE	**14,486,848**	**17,282,002**

2013-2014 DRAFT BUDGET & ACTION PLAN

Acquire cost-effective energy, accelerate investment, innovate, be accessible and transparent, communicate value, focus on customers.

EnergyTrust of Oregon

Market Transformation Northwest Energy Efficiency Alliance (NEEA)

Commercial

Program Purpose: NEEA funds regional market transformation initiatives in the Northwest region across commercial, industrial and residential sectors working in coordination with Energy Trust programs. This budget contemplates leveraging NEEA regional market transformation initiatives in the commercial market sector to acquire cost-effective savings while creating sustainable and efficient purchasing patterns among commercial consumers.

2013 Strategies & Activities

1. It continues to be our primary goal to ensure that investing in energy efficiency is a high return option for building owners/operators/ investors and supply chain partners
2. Commercial Real Estate will focus on SEM by facility owners and managers. Initiative will be modified to improve savings measurement. New programs initiated in Boise, Portland and Lloyd Eco District (Portland)
3. Continue transitioning Hospitals initiative to Energy Trust.
4. Complete the commercial lighting initiative as currently defined and define specifics of regional coordination.
5. Existing Building renewal will focus only on pilot acquisition and integrated measure package implementation and testing.
6. Builder Operators Certification will continue to expand the capabilities of our trade allies through certified training programs as well as curriculum, and delivery channel enhancements.
7. Focus on creating capable and integrated supply chain trade allies in each initiative

2013 New Initiatives & Focus Areas

1. Begin 2-3 Existing Building Renewal pilots to test and enhance the accuracy of the integrated measure packages
2. Luminaire level lighting controls introduced as an initiative
3. LED street lighting with controls introduced as an initiative
4. Redefine the competitions and market partner's components of the Commercial Real Estate initiative to expand the impact of these SEM efforts and improve initiative savings measurability. Add Portland, Boise and Lloyd Eco district
5. Expand building Operators certification in existing and new target audiences. Complete introduction of new curriculum and channels.
6. Redefine the commercial lighting initiative to include components of a regional coordination effort which will include training and upstream programs
7. Complete a comprehensive market strategy for the commercial market
8. Review all initiatives currently in scanning and determine resolution

2014 Planned Activities

1. Expansion of the Existing Building Renewal initiative to include market facing activities to broaden the reach and range of technical planning tools and pilots
2. Exit hospital market and initiative
3. Expansion of an integrated SEM approach to market transformation
4. Expansion of commercial lighting regional coordination components including upstream activities
5. Introduction of any initiatives identified in 2013 scanning review process
6. Move all initiatives through appropriate Initiative life cycle stage gates

Targets

	Annual Expense			Electric Savings			
				Goal		Levelized Cost	
	($M)			aMW		($/kWh)	
Year	Electric	Gas	Total	Conserv	Stretch	v	Stretch
2012 Forecast	$2.8		$2.8	1.86		$0.038	
2013 Budget	$3.0		$3.0	1.93	2.27	$0.018	$0.015

The Energy Trust of Oregon, Inc
2013 Draft Budget
11XX Mkt Tr (NEEA) - Comm

	2012 Forecast	2013 Budget
Delivery Costs		
Program Delivery	$2,637,642	$2,843,803
Total Delivery Costs	**2,637,642**	**2,843,803**
ETO expenses		
Staffing	3,067	12,312
Allocations	52,484	62,376
Sub-Total before Admin Costs	**2,693,194**	**2,918,491**
Administrative Costs	102,316	111,445
TOTAL EXPENSE	**2,795,510**	**3,029,936**

2013-2014 DRAFT BUDGET & ACTION PLAN

Acquire cost-effective energy, accelerate investment, innovate, be accessible and transparent, communicate value, focus on customers.

EnergyTrust of Oregon

Business Energy Solutions – Production Efficiency (PE)

Industry and Agriculture

Program Purpose: Acquire cost-effective electric and gas savings through technical assistance and financial incentives for high-efficiency design, equipment and operations in existing and new industrial and agricultural processes and facilities. Promote innovative technological and behavioral approaches to industrial energy efficiency; provide technical expertise, training and project funding to help companies plan, manage and improve their energy efficiency.

2013 Strategies & Activities

1. Custom track allows for a comprehensive approach to process efficiency projects, retrofits, operations & maintenance (O&M).
    a. Custom Program Delivery Contractor (PDC) delivery funds dedicated industrial engineers to work with medium to large sites, to facilitate program participation. The Custom track approach is relationship based and designed to reap the unique, ongoing efficiency opportunities in industry. Custom PDCs are geographically assigned territories with the exception of a single PDC dedicated to food processing and pulp and paper strategic markets.
2. Lighting Trade Ally Network, shared with the Commercial programs, remains a highly cost-effective element of the PE program and will continue to accelerate savings.
3. Small Industrial and Agricultural Initiative relies on Trade Allies to serve smaller manufacturers, farmers, nurseries, and wineries, many in rural areas. Small Industry and Ag PDC will develop additional prescriptive and semi-prescriptive measures. This initiative will increase awareness by focusing on marketing and trade ally development.
4. Industrial gas efficiency is fully integrated into the delivery of both the Custom track for larger projects and the prescriptive track for small industrial and agricultural participants. Industrial customers who purchase their gas from a 3rd party (i.e., Transport customers) are not eligible for incentives. The program also identifies, analyzes and incents industrial solar thermal opportunities as gas efficiency projects
5. Increase depth and persistence of savings and respond to customer demand by providing training, tools, technical support and public recognition to establish or improve an energy management culture in the workplace
6. Drive customer adoption of industrial strategic energy management (SEM) and support their continuous improvement, including a new cohort of Industrial Energy Improvement (IEI) for 10 plants, SEM Maintenance services to past participants, corporate SEM for individual sites, SEM to the ISO 50001 energy management standard for 2 plants, and a new cohort of Refrigeration Operator Coaching (ROC) for 5 food processing or cold storage facilities.

2013 New Initiatives & Focus Areas

1. Hold steady on most program offerings, channels to market, strategies, and base incentive levels for projects. Primary focus is on helping Industrial customers participate easily and continue to achieve even deeper savings by consistently providing the high quality services and incentives that have proven effective in recent years.
2. Further develop Energy Trust's Strategic Energy Management offerings for all sizes of industrial customers. Synthesize best practices and lessons learned in 2009-2012 SEM initiatives and standardize SEM offerings for highest impact. Continue to test the scalability of SEM and provide more comprehensive services to motivated small industrial customers by completing the first cohort (begun in 2012) of 12 companies participating in the CORE pilot. Tune the design based on findings and launch a 2nd cohort of CORE.
3. Increase O&M project volume by tuning and re-launching technical services designed to identify and analyze deep, comprehensive O&M savings opportunities in complex industrial systems.
4. Continue to support and learn from emerging industrial lighting measures and applications, including comprehensive lighting design approaches and LED measures.

2014 Planned Activities

1. Finalize design, integrate cost-effective small industrial SEM into program based on CORE pilot results.

2013-2014 DRAFT BUDGET & ACTION PLAN

Acquire cost-effective energy, accelerate investment, innovate, be accessible and transparent, communicate value, focus on customers.

EnergyTrust of Oregon

Targets

	Annual Expense			Electric Savings				Gas Savings			
				Goal		Levelized Cost		Goal		Levelized Cost	
	($M)			aMW		($/kWh)		Therms		($/therm)	
Year	Electric	Gas	Total	Conserv	Stretch	v	Stretch	Conserv	Stretch	Conserv	Stretch
2012 Forecast	$28.8	$3.2	$32.0	14.05		$0.029		1,089,270		$0.299	
2013 Budget	$31.2	$3.3	$34.5	14.04	16.52	$0.030	$0.025	971,159	1,142,540	$0.344	$0.293

The Energy Trust of Oregon, Inc
2013 Draft Budget
Production Efficiency

	2012 Forecast	2013 Budget
Incentives	**$21,400,442**	**$22,871,905**
Delivery Costs		
Program Delivery	7,476,852	7,853,967
Performance Comp	136,000	156,000
Total Delivery Costs	**7,612,852**	**8,009,967**
ETO expenses		
Staffing	649,522	773,522
Marketing	105,000	196,000
Other Services	734,517	911,517
General	100,210	63,910
Allocations	499,088	613,372
Sub-Total before Admin Costs	**31,101,631**	**33,440,193**
Administrative Costs	915,695	1,048,346
TOTAL EXPENSE	**32,017,326**	**34,488,540**

2013-2014 DRAFT BUDGET & ACTION PLAN

Acquire cost-effective energy, accelerate investment, innovate, be accessible and transparent, communicate value, focus on customers.

EnergyTrust of Oregon

Market Transformation Northwest Energy Efficiency Alliance (NEEA)

Industrial

Program Purpose: NEEA funds regional market transformation initiatives in the Northwest region across commercial, industrial and residential sectors working in coordination with Energy Trust programs. This budget contemplates leveraging NEEA regional market transformation initiatives in the industrial market sector to acquire cost-effective savings while embedding sustainable and efficient products, practices, and services among industrial and agricultural consumers**.**

2013 Strategies & Activities

1. The Small to Medium Industrial (SMI) initiative applies key learnings from the food processing industry to accelerate adoption of Strategic Energy Management (SEM) by the SMI market. The initiative is piloting an online version of Continuous Energy Improvement (CEI) designed to allow resource-constrained SMIs to manage energy as their schedules allow. Focusing on Strategy Development in 2013, field trials will be deployed of online CEI as a reliable methodology for SMIs to achieve energy savings, and leverage utilities and market actors to recruit and deploy online CEI to end users and cohorts of end users.
2. Develop an easy-to-use, integrated agricultural irrigation decision support solution leveraging existing equipment components (irrigation hardware, controls, moisture sensing, soil mapping, weather information, pump controls, user interfaces, and services). Influence the agriculture industry to engage, define, and adopt protocols, and develop standards for data collection and management to enable 20 percent energy and water reduction by 2020.
3. The Food Processing (FP) initiative comprises an SEM whole product that leverages the Northwest Food Processors Association (NWFPA) energy intensity reduction goal to increase adoption of SEM. In 2013, plans to transition the FP initiative to completion and long-term monitoring phase will continue by monitoring CEI-engaged companies in self-sustaining mode to ensure persistence of savings, and promote relationships among food processors and their serving utilities to ensure end users look first to their utilities to begin energy efficiency efforts. The transition will be complete by end of 2013.
4. The Certified Refrigeration Energy Specialist (CRES) initiative is a coordinated effort among associations and other market players to fund, develop, market and launch a certification effort. CRES includes the creation of a project data base, learning objectives, prequalification exam, partnership with RETA, and assuring ANSI accreditation. Refrigeration System Operators (RSO) will be encouraged to obtain certification; owners to require certification; and training orgs to help RSOs prepare for certification.

2013 New Initiatives & Focus Areas

1. Development of Industrial Market Strategy for Strategic Energy Management
2. Development of Industrial Market Strategy for Refrigeration

2014 Planned Activities

1. Achieve Product Release for Precision Irrigation
2. Develop third Industrial Market Strategy for Pumping Systems

Targets

	Annual Expense			Electric Savings			
				Goal		Levelized Cost	
	($M)			aMW		($/kWh)	
Year	Electric	Gas	Total	Conserv	Stretch	v	Stretch
2012 Forecast	$1.4		$1.4	0.47		$0.049	
2013 Budget	$1.6		$1.6	0.56	0.66	$0.041	$0.035

The Energy Trust of Oregon, Inc
2013 Draft Budget
14XX Mkt Tr (NEEA) - Ind

	2012 Forecast	2013 Budget
Delivery Costs		
Program Delivery	$1,327,998	$1,431,794
Total Delivery Costs	**1,327,998**	**1,431,794**
ETO expenses		
Staffing	1,433	6,812
Allocations	52,428	62,147
Sub-Total before Admin Costs	**1,381,859**	**1,500,753**
Administrative Costs	50,245	56,677
TOTAL EXPENSE	**1,432,104**	**1,557,430**

2013-2014 DRAFT BUDGET & ACTION PLAN

Acquire cost-effective energy, accelerate investment, innovate, be accessible and transparent, communicate value, focus on customers.

EnergyTrust of Oregon

Home Energy Solutions- Existing Homes

Residential

Program Purpose: Acquire cost-effective electric and gas savings by providing energy-efficiency services and incentives for existing single-family and mobile home dwellings.

2013 Strategies & Activities

1. Transition to a new PMC, ensuring a high level of customer service and maintaining aggressive savings goals.
2. Utilize the new CRM system and enhance customer experience through the energy efficiency journey to maximize customer participation and investments in energy efficiency.
3. Implement savings portfolio adjustments to provide reliable, long-term savings and replace transforming measures.
4. Adjust measure and program requirements with a goal of reducing installation cost and improving savings performance of weatherization measures.
5. Guide customers to relevant resources and support, based upon customer disposition, utility consumption, and housing characterization criteria.
6. Provide a seamless path for connecting customers to access Trade Allies through referral options.
7. Identify, promote and facilitate consumer awareness and education of energy efficiency actions through online, phone, and in-home Home Energy Reviews and provide education on measure payback.
8. Reduce dependence on Instant Savings Measures (ISM) while transitioning to Program-and Trade Ally- direct installations, integration with the online audit tool, and advancement of relationships with customer-owned utilities.
9. Expand market-based support and responsibility of the Home Performance with ENERGY STAR track by focusing Program resources on industry collaboration and empowerment of trade allies and market actors.
10. Develop promotion and delivery of water heater savings strategies, including ENERGY STAR Gas tank, heat pump, and solar thermal installations through outreach and in collaboration with NEEA, supply chain, and trade allies.
11. Expand lender ally participation and increase promotion of financing products.
12. Integrate Trade Ally participation requirements into the rating system to further distinguish high-performing allies.
13. Provide simplified solutions for trade allies, including web forms for all program tracks, contractor referral codes and development of tools to increase trade ally visibility into their program activities and customers.
14. Manage partnerships with community action programs to support Quality Control verifications in remote regions and to support program referrals to saving within reach and existing mobile homes track.
15. As a pilot, extend delivery of Energy Performance Scores from the new home market to existing homes which participate in deep retrofits.
16. Continue to explore behavioral savings strategies, including a test to measure the persistence of savings related to the 2011-12 Opower pilot with NW Natural and PGE customers; and potentially expand Opower efforts to a small set of Pacific Power electric heating customers.

2013 New Initiatives & Focus Areas

1. Develop and integrate a market-oriented quality control process by training trade allies to develop internal processes for quality assurance.
2. Create avenues to expand program delivery functions, such as Home Energy Reviews and ISMs, to be provided by trade allies.
3. Implement gas weatherization pilots aimed at testing alternative delivery approaches for installation of air and duct sealing measures.
4. Transition school-based approach from Living Wise Kit education program (delivered through Resource Action Programs) to outreach and education services delivered through Community Action Partnership of Oregon (CAPO).
5. Create an EEAST compliant financing product targeted to accommodate the needs of Savings Within Reach customers.

2014 Planned Activities

1. Increase percentage of Home Energy Reviews delivered by trade allies.

2013-2014 DRAFT BUDGET & ACTION PLAN

Acquire cost-effective energy, accelerate investment, innovate, be accessible and transparent, communicate value, focus on customers.

EnergyTrust of Oregon

Targets

	Annual Expense			Electric Savings				Gas Savings			
				Goal		Levelized Cost		Goal		Levelized Cost	
	($M)			aMW		($/kWh)		Therms		($/therm)	
Year	Electric	Gas	Total	Conserv	Stretch	v	Stretch	Conserv	Stretch	Conserv	Stretch
2012 Forecast	$16.3	$9.3	$25.6	6.24		$0.032		1,694,001		$0.442	
2013 Budget	$16.1	$11.4	$27.5	5.20	6.11	$0.037	$0.032	1,056,392	1,242,814	$0.833	$0.708

The Energy Trust of Oregon, Inc
2013 Draft Budget
Existing Homes

	2012 Forecast	2013 Budget
Incentives	**$12,446,125**	**$13,439,952**
Delivery Costs		
Program Management	427,805	440,639
Program Delivery	5,634,368	6,316,448
Marketing-PMC	1,958,367	1,453,000
Performance Comp	200,000	140,000
Total Delivery Costs	**8,220,540**	**8,350,087**
ETO expenses		
Staffing	485,935	672,397
Marketing	380,000	467,500
Other Services	1,094,890	1,101,890
General	70,750	79,500
Allocations	2,070,355	2,421,135
Sub-Total before Admin Costs	**24,768,595**	**26,532,461**
Administrative Costs	852,481	973,894
TOTAL EXPENSE	**25,621,076**	**27,506,355**

2013-2014 DRAFT BUDGET & ACTION PLAN

Acquire cost-effective savings, accelerate investment, innovate, be accessible and transparent, communicate value, focus on customers.

EnergyTrust of Oregon

New Homes & Products

Residential

Program Purpose: Transform the residential new construction market to minimize lost energy efficiency opportunities and support builders to meet higher efficiency standards. Overcome market barriers to the retail purchase of energy-efficient products and manufactured homes. Achieving energy savings through consumer purchase of specialty CFLs & LEDs, high performance showerheads, energy-efficient appliances and recycling of inefficient refrigerators & freezers.

2013 Strategies & Activities

1. Secure 18 percent market share of EPS homes built within Energy Trust territory up from a goal of 13 percent in 2012. As the market continues to rebound this translates to 900 new homes in 2013, down from a projected 1,000 total homes in 2012.
2. Increase homebuyer awareness, understanding, and purchase of EPS homes (Energy Trust's energy performance scoring tool) through home tour support, web content, Smart Homebuyer campaign, and identifying homes striving to reach net zero.
3. Leverage residential market actors (NEEA, real estate community and home builders associations) to reach the largest portion of the market possible.
4. Increase market awareness and uptake of EPS and energy-efficient building practices within the building community (i.e. builders, architects, lenders and appraisers.)
5. Continue to improve trade ally's engagement in the program through paperless processes, enhanced on-line information, and supporting the integration of current modeling with NEEA's online ENERGY STAR New Homes database.
6. Educate customers on energy-efficiency and drive them to purchase the most energy-efficient products at retail.
7. Identify ways to motivate customers to make energy-efficient product choices beyond financial incentives.
8. Build and leverage relationships with retailers and manufacturers to increase availability of energy efficient products and strengthen engagement with the program.
9. Further expand measure portfolio to diversify savings opportunities (clothes washer recycling, LEDs) and develop new innovative program designs.
10. Encourage repeat participation with the program and other Energy Trust residential offerings by analyzing products program data to model future participation behavior.
11. Coordinate retail programs with NEEA, NW utilities, and Western Regional Utility Network (WRUN) to streamline regional energy efficiency efforts.
12. Expand savings within a shrinking manufactured homes market by focusing on new advanced regional specifications, leveraging manufactured home retailers and industry stakeholders to educate consumers.

2013 New Initiatives & Focus Areas

1. Support builders through Oregon code and ENERGY STAR specification increases to encourage continued program participation.
2. Leverage independent training organizations to bring new technical support to our trade allies.
3. Offer stand-alone measures to subcontractors, including a ducts-inside initiative in coordination with NEEA.
4. Continue to work with industry stakeholders to identify cost effective strategies to reduce the energy consumption of new homes.
5. Offer tiered product incentives to consumers at retail to continue pushing a good, better, best approach.
6. Promote LED technology through specific, targeted channels also gather and analyze feedback on customer experience.
7. Explore cost effectiveness improvement of refrigerator recycling and incent clothes washer recycling (retirement).
8. Pilot a market lift approach at retail for CFLs with BPA and D&R Intl. Work with the Existing Homes program staff to leverage predictive modeling and data analysis to help support market engagement efforts.
9. Offer new manufactured homes retailer incentives to support higher standards beyond ENERGY STAR.
10. Research and develop opportunities to increase the assortment of cost effective product to receive incentives.

2014 Planned Activities

1. Continue established activities with available funds, employing flexibility to meet savings and funding expectations.
2. Transition more of the New Homes activities to the marketplace and leverage NEEA's New Homes program.
3. Expand LED lighting offerings while continuing to focus on consumer education and specialty CFLs.
4. Move toward alternative retail models for appliances - market lift, instant incentives, and midstream buy downs.
5. Increase the assortment of products to offer cost-effective incentives - based on 2013 research and development.

2013-2014 DRAFT BUDGET & ACTION PLAN

Acquire cost-effective savings, accelerate investment, innovate, be accessible and transparent, communicate value, focus on customers.

EnergyTrust of Oregon

Targets

	Annual Expense			Electric Savings				Gas Savings			
				Goal		Levelized Cost		Goal		Levelized Cost	
	($M)			aMW		($/kWh)		Therms		($/therm)	
Year	Electric	Gas	Total	Conserv	Stretch	v	Stretch	Conserv	Stretch	Conserv	Stretch
2012 Forecast	$15.0	$4.2	$19.2	5.78		$0.039		792,189		$0.420	
2013 Budget	$17.3	$4.0	$21.2	5.39	6.34	$0.051	$0.043	755,111	888,366	$0.607	$0.516

The Energy Trust of Oregon, Inc
2013 Draft Budget
New Homes & Products

	2012 Forecast	2013 Budget
Incentives	**$10,295,474**	**$11,919,916**
Delivery Costs		
Program Management	227,858	272,160
Program Delivery	4,337,609	4,128,828
Marketing-PMC	1,786,708	1,786,703
Performance Comp	200,000	115,000
Total Delivery Costs	**6,552,175**	**6,302,691**
ETO expenses		
Staffing	311,810	349,403
Marketing	276,500	292,000
Other Services	213,990	510,190
General	54,750	46,000
Allocations	848,268	1,003,133
Sub-Total before Admin Costs	**18,552,967**	**20,423,332**
Administrative Costs	644,755	790,117
TOTAL EXPENSE	**19,197,723**	**21,213,449**

2013-2014 DRAFT BUDGET & ACTION PLAN

Acquire cost-effective energy, accelerate investment, innovate, be accessible and transparent, communicate value, focus on customers.

EnergyTrust of Oregon

Market Transformation Northwest Energy Efficiency Alliance (NEEA)

Residential

Program Purpose: NEEA funds regional market transformation initiatives in the Northwest across commercial, industrial and residential sectors working in coordination with Energy Trust programs. This budget supports NEEA's regional market transformation initiatives in the residential market sector to acquire cost-effective savings while creating sustainable and efficient purchasing patterns among consumers**.**

2013 Strategies & Activities

1. Provide technical and marketing support for the Northwest ENERGY STAR Homes while transitioning program elements to the market (i.e. Support open providership model). This transition allows the program to diversify focus and develop an implementation strategy for an advanced performance home leveraging learnings from the 12 test homes built in 2012.
2. Capitalize on relationships with retailers established in 2009-2012 to continue to gain market share for efficient televisions. Leverage retail relationships to explore additional regional retail strategies leveraging the NW Regional Retail collaborative. Opportunities may include leveraging experience with television initiative to diversify retailer stocking practices across several categories.
3. Continue to build contractor and distributor infrastructure for ductless heat pumps. Support continued advancement of DHPS in retail channel and explore alternative installation practices to support trades outside of traditional HVAC channel. Explore barriers and opportunities of DIY installations.
4. Complete heat pump water heater market test and transition to full scale implementation. Explore additional opportunities to drive demand for Tier 1 HPWH products and leverage NEEA's relationship with retailers to influence increased customer adoption of this technology.
5. Track and report on market transformation savings from new homes, compact fluorescent light bulbs, and consumer appliances.

2013 New Initiatives & Focus Areas

1. Support the region in implementing an integrated, regionally coordinated retail strategy that leverages strengths of NEEA, ETO, BPA, and NW utilities. The retail strategy will utilize the market power of NW, potentially in concert with California utilities, to provide platform for coordinated utility acquisition programs incenting retailers to carry the most energy-efficient products.
2. Support launch of Super-Efficient dryer initiative.
3. Support advancement and field test of high performance home.
4. Develop transition strategy for Television initiative.
5. Continue to identify opportunities to commercialize emerging technologies, utilizing a regional advisory group to help set priorities and scope projects.
6. Increase participation in Federal and regional proceedings to create and improve equipment efficiency standards; bring information on NW successes in market adoption of efficient products to that process.

2014 Planned Activities

1. Similar to 2013.
2. As funding progressively increases, expand work on emerging technologies and select other new initiatives.

Targets

	Annual Expense			Electric Savings			
				Goal		Levelized Cost	
	($M)			aMW		($/kWh)	
Year	Electric	Gas	Total	Conserv	Stretch	v	Stretch
2012 Forecast	$4.5		$ 4.5	2.54		$0.032	
2013 Budget	$4.9		$ 4.9	2.19	2.58	$0.040	$0.034

The Energy Trust of Oregon, Inc
2013 Draft Budget
157X Mkt Tr (NEEA) - Res

	2012 Forecast	2013 Budget
Delivery Costs		
Program Delivery	$4,321,270	$4,659,024
Total Delivery Costs	**4,321,270**	**4,659,024**
ETO expenses		
Staffing	1,549	18,464
Allocations	55,450	66,045
Sub-Total before Admin Costs	**4,378,269**	**4,743,533**
Administrative Costs	141,382	174,393
TOTAL EXPENSE	**4,519,651**	**4,917,926**

2013-2014 DRAFT BUDGET & ACTION PLAN

Acquire cost-effective energy, accelerate investment, innovate, be accessible and transparent, communicate value, focus on customers.

EnergyTrust of Oregon

NW Natural Washington

Program Purpose: To broaden gas savings opportunities to customers of NW Natural (NWN) in southwest Washington by increasing program awareness, building off of Oregon success and collaborating with key stakeholders and utilities.

2013 Strategies & Activities

Residential (Existing & New Homes):

- Further efforts to increase the profile of energy efficiency in the consumer market, build Energy Trust program awareness and motivate homeowners and builders to perform energy efficiency measures.
- Evaluate research, including analysis of customer disposition, utility consumption, and housing characterization criteria, to refine market potential and target specific neighborhoods for high-impact measure approaches.
- Continue to leverage Oregon initiatives applicable to the Washington market including, but not limited to, the use of online forms, contractor referrals and a market-oriented quality control process.
- Collaborate with industry stakeholders, including Clark Public Utilities, Planet Clark, Clark County, NWN, BPA, NEEA, BIA, the verifier network and other market partners, to promote incentive offerings, leveraging their existing communication channels and events.
- In collaboration with regional groups and partners, participate in community events, employer fairs and other public channels that offer access to high potential customers within NWN WA territory.
- Provide education and product-specific collateral to retail product distributors and installers.
- Provide direct support and assistance to current trade allies to increase number of projects submitted to the program, as well as recruiting new trade allies to the network.
- Help to transform the market to increase consumer demand for energy efficient construction and positively affect energy code cycles.

Existing Buildings:

- Drive deeper savings per customer by bolstering portfolio of measures and more heavily promoting custom incentive program.
- Increase outreach efforts to mid-stream and up-stream supply houses and equipment manufacturers.
- Increase marketing activities to improve awareness of services available to Clark County businesses.
- Maintain direct sales efforts slightly below 2012 FTE levels, focusing greater attention toward trade ally recruitment and engagement in order to diversify project channels coming into the program.
- Maintain focus on K-12 Schools, particularly given upcoming WA State funding awards for energy projects.
- Leverage relationships with national lodging and food service chains to boost program participation in this sector (food service equipment, dish washing, pool and water heating projects).

2013 New Initiatives & Focus Areas

Residential (Existing & New Homes):

- Expand participation of lending institutions as lender allies and increase integration and promotion of lending ally products in the WA marketplace.
- Continue to develop plumber direct install initiative of showerheads, showerwands and aerators.
- Continue roll out of low-income energy saver kits through Clark County food pantries.
- Explore possibility of providing incentives for additional efficient building tiers beyond ENERGY STAR.

Existing Buildings:

- Pending analysis of 2012 performance, continue collaborative rooftop unit tune-up (RTU) incentive offerings with Clark Public Utilities.
- Amend WA custom process to allow for up-front study payment to boost program participation. Potentially, WA may closely match the OR custom approach by utilizing ATACs, walk-through assessments and/or site evaluations.
- Explore opportunities for joint funding of custom project studies with Clark Public Utilities.

2014 Planned Activities

- Implement strategies to achieve IRP efficiency savings goals despite termination of furnace incentives after 2013.
- Begin shifting delivery of Home Energy Reviews to the marketplace.

(See targets and budget detail on reverse side)

2013-2014 DRAFT BUDGET & ACTION PLAN

Acquire cost-effective energy, accelerate investment, innovate, be accessible and transparent, communicate value, focus on customers.

EnergyTrust of Oregon

Targets

	Annual Expense			Gas Savings			
				Goal		Levelized Cost	
	($M)			Therms		($/therm)	
Year	Electric	Gas	Total	Conserv	Stretch	Conserv	Stretch
2012 Forecast		$ 1.3	$ 1.3	227,267		$0.445	
2013 Budget		$ 1.4	$ 1.4	223,681	263,154	$0.490	$0.416

The Energy Trust of Oregon, Inc
2013 Draft Budget
WA Combined

	2012 Forecast	2013 Budget
Incentives	**$559,374**	**$610,706**
Delivery Costs		
Program Management	35,713	43,107
Program Delivery	302,428	357,959
Marketing-PMC	95,350	25,472
Performance Comp	7,900	20,000
Total Delivery Costs	**441,391**	**446,538**
ETO expenses		
Staffing	92,565	99,862
Marketing	10,000	31,500
Other Services	35,000	21,500
General	28,214	31,014
Allocations	118,792	148,635
Sub-Total before Admin Costs	**1,285,338**	**1,389,757**
Administrative Costs	45,107	50,486
TOTAL EXPENSE	**1,330,445**	**1,440,243**