

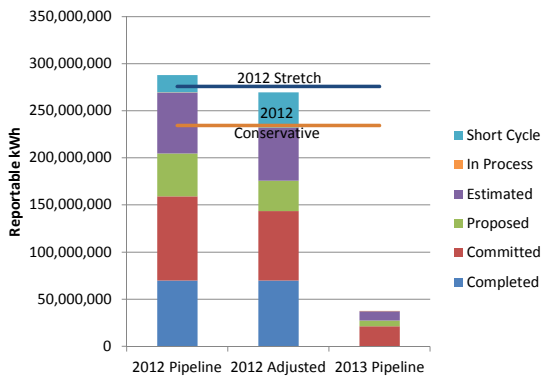
Efficiency Summary with Market Transformation

July 1, 2012

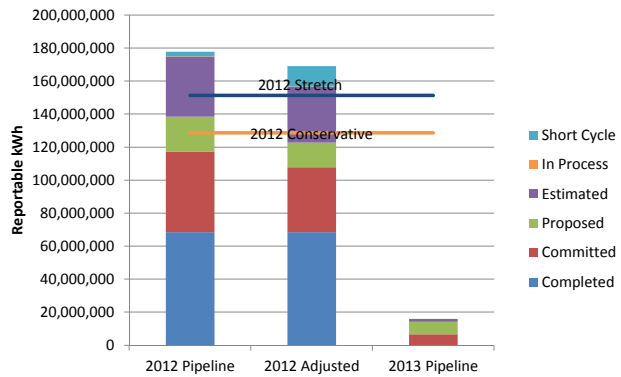
Combined Efficiency		PGE	PAC	NWN	CNG
Achievement	2012 Achievement to Date (Rpt kWh or therm)	69,843,396	68,545,488	1,550,306	91,861
	To date % of Conservative goal	30%	53%	35%	25%
	To date % of stretch goal	25%	45%	30%	21%
Context	Historical % of actual accomplishment	34%	26%	34%	27%
Budget	To Date % of Incentive Budget Spent	28%	44%	36%	19%

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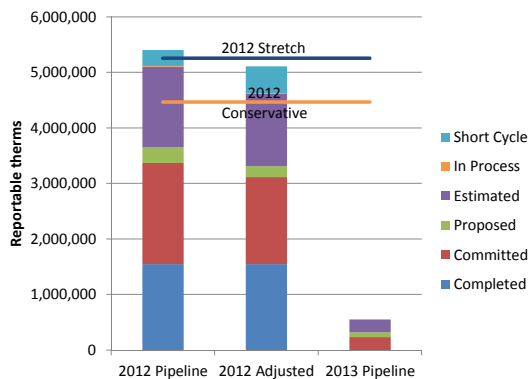
PGE Savings Pipeline 2012-2013



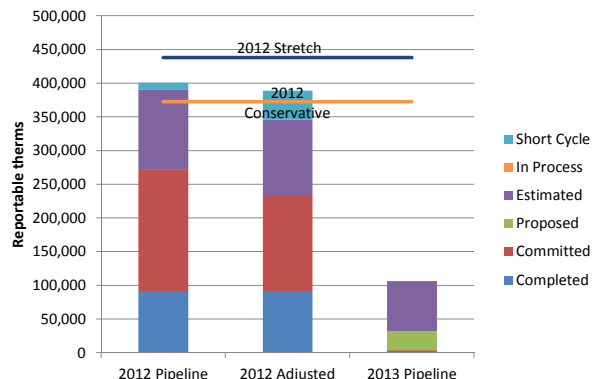
PAC Savings Pipeline 2012-2013



NWN Savings Pipeline 2012-2013



CNG Savings Pipeline 2012-2013



2012 Adjusted Pipeline percent of Stretch Goal	
PGE: 97.69%	PAC: 111.66%
NWN: 97.18%	CNG: 88.82%

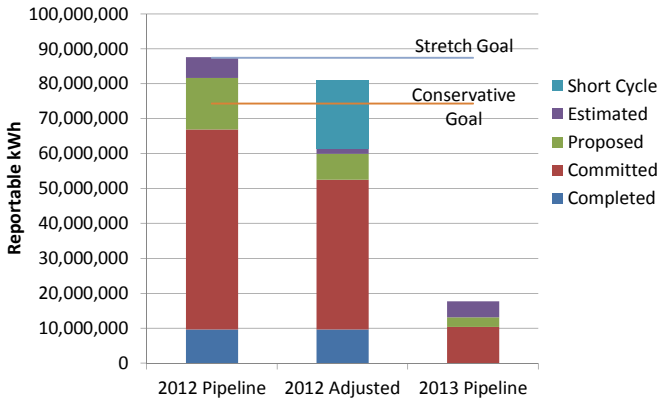
Industry & Agriculture Summary

July 1, 2012

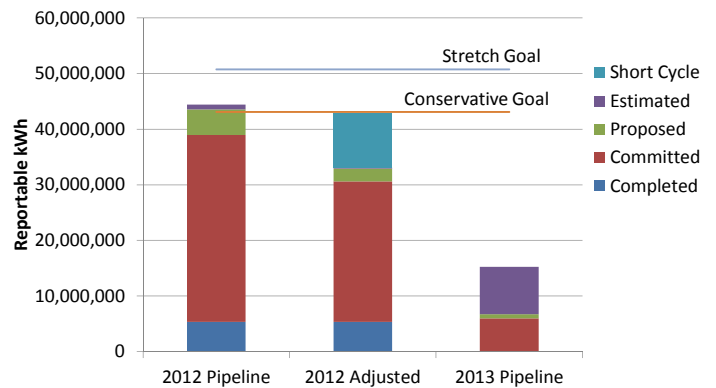
		PGE	PAC	NWN	CNG
Achievement	2012 Achievement to Date (Rpt kWh or therm)	9,611,282	5,366,925	161,264	-
	2012 Stretch Goal (kwh or therm)	87,391,719	50,701,285	1,031,485	126,035
	To date % of conservative goal	13%	12%	18%	0%
	To date % of stretch goal	11%	11%	16%	0%
Budget Context	Historical % of actual	29%	23%	22%	11%
	% of incentive budget spent	17%	15%	9%	6%

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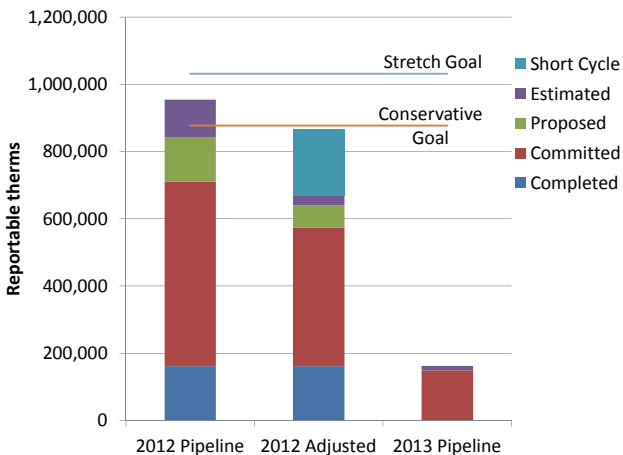
PGE Pipeline 2012 - 2013



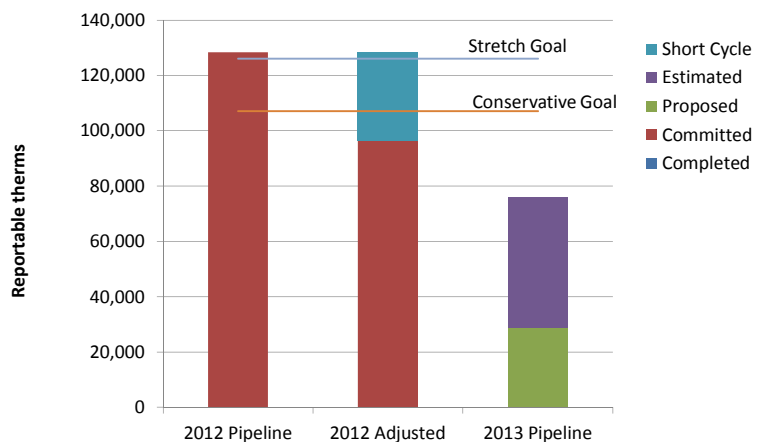
PAC Pipeline 2012 - 2013



NWN Pipeline 2012 - 2013



CNG Pipeline 2012 - 2013



2012 Adjusted Pipeline percent of Stretch Goal			
PGE:	93%	NWN:	84%
PAC:	85%	CNG:	102%

Program Activity		
Activity	2012	2011
<i>Studies Assigned</i>	35	78
<i>Studies Approved</i>	47	57
<i>Offers Signed</i>	204	172
<i>Offers counter-signed</i>	130	162
<i>Projects Completed</i>	326	291

Special Considerations:

Overall:

The program appears to be on track to meet or exceed Conservative goals in all territories. Program activity has been intense in Q2, with the Kick Start bonus helping to drive 125 new offers and 85 new commitments to proceed before it ended on June 29th.

PGE

The adjusted pipeline in PGE territory is at 93% of stretch goal. Project completions are lagging in comparison to historical trends, but activity is high, with many new committed projects entering the pipeline in Q2, and the program appears to be on track to achieve savings approximately midway between stretch and conservative goal. Spending to date is in alignment with budget expectations.

PAC

The adjusted pipeline in PAC territory is at 85% of stretch goal. Project completions to date are lagging in comparison to historical trends, and it will be necessary to continue to push hard in Q3 for new savings in order to reach beyond conservative and towards stretch goal. Spending to date is in alignment with budget expectations.

NWN

The adjusted pipeline in NWN territory is at 84% of stretch goal. An uptick in new projects just entered the pipeline in the last 4 weeks and not all of these are reflected in these estimates. These new savings plus the historical influx of smaller gas projects that usually appear in the early fall is expected to result in the program achieving savings of more than 90% of stretch at year end. Incentive spending to date is lower than expected for the therm savings achieved.

CNG

CNG's pipeline remains robust, at 102% of stretch goal, with a small number of fairly large projects moving through construction now. Confidence is high that the program will achieve stretch goal in CNG territory in 2012. Spending to date is in alignment with expectations.

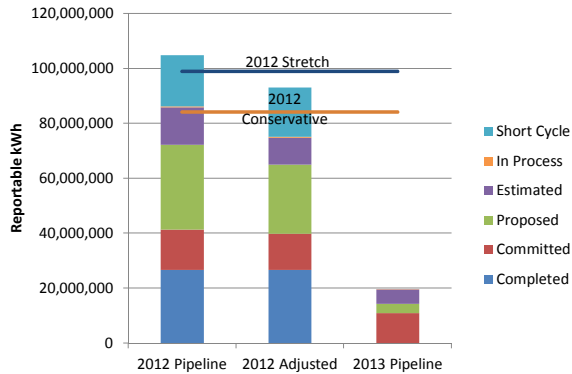
Commercial Programs Summary

July 1, 2012

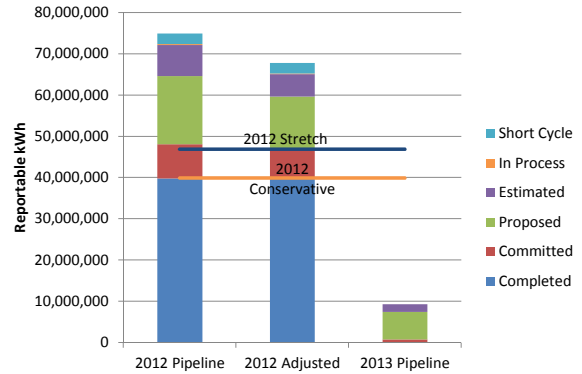
Commercial Sector		PGE	PAC	NWN	CNG
Achievement	2012 Achievement to Date (Rpt kWh or therm)	26,645,096	39,816,507	518,186	43,058
	To date % of Conservative goal	32%	100%	35%	31%
	To date % of stretch goal	27%	85%	29%	26%
Context	Historical % of actual accomplishment	23%	19%	23%	26%

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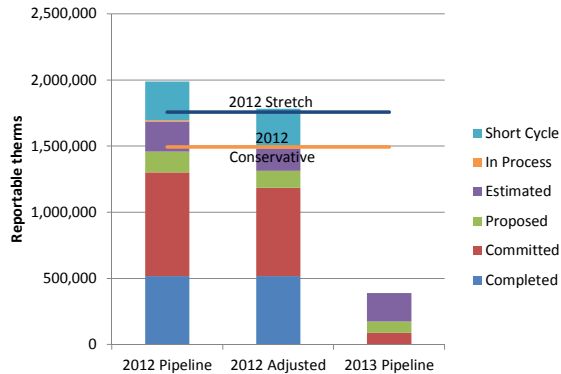
PGE Savings Pipeline 2012-2013



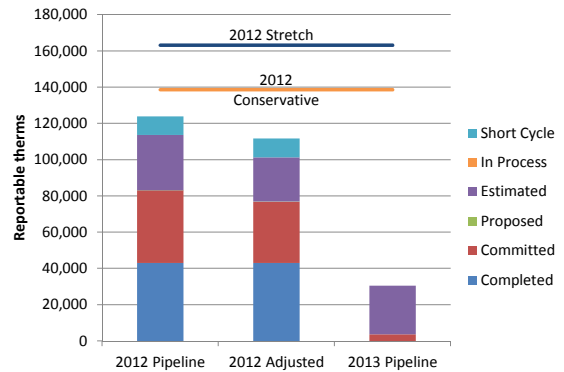
PAC Savings Pipeline 2012-2013



NWN Savings Pipeline 2012-2013



CNG Savings Pipeline 2012-2013



2012 Adjusted Pipeline percent of Stretch Goal	
PGE: 94%	PAC: 144%
NWN: 101%	CNG: 69%

Special Considerations:

Overall

- The Sector is on Track to exceed Stretch Goal for PGE, Pacific Power and NWN.
- The Sector is on Track to exceed Conservative Goal in CNG. The Sector is focusing efforts on enrolling same year NB and EB projects to achieve the Stretch Goal.
- The Kick-Start Bonus (KSB) offer, a 20% incentive increase for lighting and custom projects, contributed significantly to the 2012 project pipeline. In order to be eligible for the bonus projects had to have an incentive offer from the program by June 29th. The Existing Buildings program is well positioned to meet or exceed stretch goals for all utilities.
- NB Electric savings are more than double this time last year, due to an increase in same year enrollments driven by projects in the industrial, multi-family and grocery market sectors unexpectedly enrolling early this year. Increased incentive demand and savings are expected for electric utilities, resulting in a much lower leveled cost for the year than anticipated.
- Oregon has seen unprecedented growth in data centers over the past few years, a trend we see continuing. While this affords the New Buildings program with the opportunity to capture large savings through custom analysis, the full savings potential may be missed without a specific program offer that scales with the market potential. The new offer, launching in July, is a series of incremental changes that will streamline the process, is scaled to meet the needs of large enterprise, mid-tier, localized and small that range in size anywhere from >10MW load data server "farm" to an office building with a <10kW load.
- The sector has been collaborating closely with ODOE on the State's Cool School initiative by providing outreach and planning services to schools to help them leverage ODOE's SB 1149 schools funds. To date Existing Buildings has been in contact with over 30 school districts; 10 of these districts have committed to complete projects by the end of 2012.
- MF has deepened outreach efforts focusing on cultivating existing relationships with decision makers at top property management. In addition, focus on direct install, custom measures, and mid stream incentives has put us ahead of historic mid-year accomplishments.
- MF is continuing work with local, regional and national organizations to develop and deploy an on-bill financing pilot called MPower Oregon continued throughout Q2.

PGE

- The EB program saw a significant surge in projects entering the pipeline as a result of the KSB end date of June 29, 2012; 546 projects are eligible for KSB. The program is on-track to meet the PGE conservative goal and is currently forecast to deliver 86% of the stretch goal. Savings are presently forecast to come from the following program Tracks: Lighting 50%, Custom 28%, Standard 6%, O&M 7% and 80+ 9%. It is still early enough in the year that it is still possible to meet the stretch goal with strategic market initiatives. Increased marketing and outreach efforts are underway for specific target markets for lighting, PC Power Management and VFDS.
- Based on the current NB pipeline the program is currently forecasted to exceed the PGE stretch goal by over 24%. This is due in part to ten large projects completing this year, one completing with over 1.5 million kWh more electric savings than originally estimated, and an unexpected increase in same year enrollments from industrial, multi-family and large grocery projects. With a \$500,000 incentive increase, the program expects to achieve a total of 23 million kWh this year.
- Existing Multifamily has continued to take steps to conduct studies with affordable housing agencies served primarily by PGE to develop long-term strategies to achieve savings in this underserved market through MPower Oregon.

PAC

- Due to a large NB project delivering significant savings that closed in Q2 the sector has already met conservative goal and is on track to exceed stretch goal.
- At the conclusion of the Kick-Start Bonus, 284 EB projects are eligible for the bonus and the program has a pipeline full of custom and lighting projects. The program is in a position to exceed the 2012 Stretch goal and budget for PacifiCorp with the current forecast indicating that the program will achieve 113% of the stretch goal. Savings are presently forecast to come from the following program Tracks: Lighting 43%, Custom 41%, Standard 4%, O&M 1% and 80+ 11%. Staff informed the Energy Trust board that the program may exceed the incentive budget by up to \$934,000 acquiring additional savings. The program will work to actively manage projects so that this increased budget is not exceeded.

NWN

- MF program has begun to see the expected rise in term savings in Q2 and Q3 which are typically the warmer quarters of the year when large custom and prescriptive HVAC projects are typically completed and processed.
- A large, custom MF project with a key affordable housing agency that was initiated in 2010 and struggled to obtain financing throughout 2011 and 2012. After extensive efforts by Energy Trust to assist this project in obtaining financing the project is re-energized and is expected to complete during Q3 2013.
- The custom EB project pipeline was strong and the Kick-Start Bonus added another 57 projects to the pipeline. Roof-Top Tune-up (RTU) activity has picked up substantially this year putting the program in a position to achieve 126% of the 2012 stretch goal and exceed the incentive budget. Savings are presently forecast to come from the following program Tracks: Custom 63%, Standard 11% and O&M 26%. The program will be actively managing additional uptake on Custom Project and RTU activity in order to manage the commercial program portfolio to achieve the Commercial Sector NWN stretch goal.
- NB Gas savings for NWN are down from last quarter due to many small changes in savings estimates and a few projects moving out of 2012. Program staff are taking steps to boost results in the second half of the year, including tapping existing projects for more savings, enrolling quick-turn projects like restaurants and reaching out to New Building Allies.

CNG

- The EB Kick-Start Bonus had a less substantial impact in CNG territory with only 4 projects leveraging the bonus. Nevertheless, the program is presently on-track to meet the Conservative Goal with the current forecast indicating the program will yield 78% of the stretch goal. Savings are presently forecast to come from the following program Tracks: Custom 73%, Standard 16% and O&M 11%. Program staff is in the process of developing an updated Steam Trap direct install initiative. Direct marketing and outreach should allow the program to push this initiative and other measures to help the program meet the stretch goal by the close of the year.
- NB Gas savings for CNG were ahead, as projected in Q1, but fell behind due to two large projects not coming through. Program staff are taking steps to boost results in the second half of the year, including tapping existing projects for more savings, enrolling quick-turn projects like restaurants and reaching out to New Building Allies.

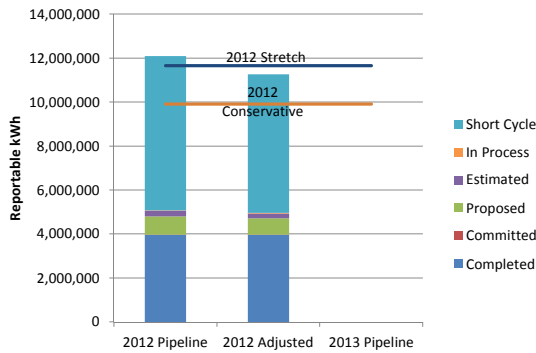
Existing Multifamily Summary

July 1, 2012

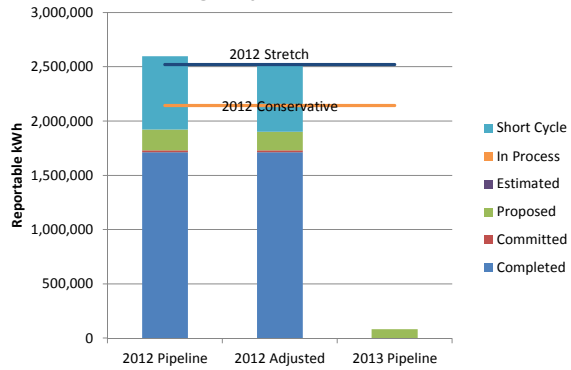
Program: Existing Multifamily		PGE	PAC	NWN	CNG
Achievement	2012 Achievement to Date (Rpt kWh or therm)	3,954,545	1,713,497	33,812	217
	To date % of Conservative goal	40%	80%	25%	0%
	To date % of stretch goal	34%	68%	21%	0%
Context	Historical % of actual accomplishment	24%	24%	33%	0%
	To Date % of Incentive Budget Spent	20%	55%	13%	0%

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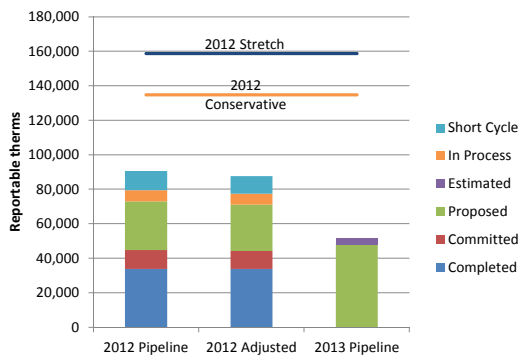
PGE Savings Pipeline 2012-2013



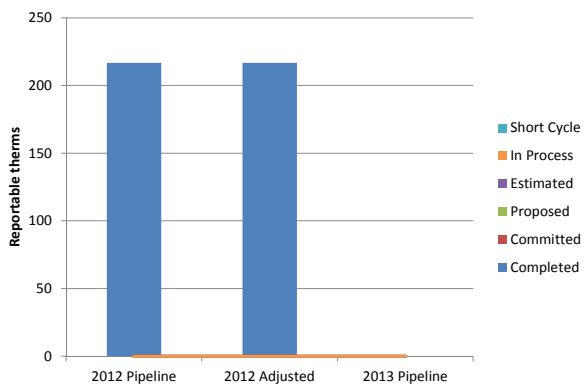
PAC Savings Pipeline 2012-2013



NWN Savings Pipeline 2012-2013



CNG Savings Pipeline 2012-2013



Special Considerations:

General

- Instant Savings Measures (ISMs) and direct install continue to make up the majority of the electric savings for Existing Multifamily and are projected to make up 60% of the overall electric stretch goal for 2012. This targeted level of contribution is down from previous years.
- Savings from custom and prescriptive measures are continuing to grow compared to previous years and are expected to contribute more robust and varied savings as the year progresses.
- Outreach efforts have deepened the focus on cultivating existing relationships with decision makers at top property management and affordable housing agencies to go access the savings opportunities identified through past direct install and building assessments.
- During Q2 Existing Multifamily continued to integrate assisted living, memory care centers and retirement living communities into the normal program focus. This integration into our normal outreach is already bringing in savings through direct install, and the first prescriptive savings are expected early in Q3.

Impact of the Economy

- Non-owner occupied dwellings continue to have some of the lowest vacancy rates on record, due to the continuing crunch for credit on home ownership.

Q2 Accomplishments

- Kick-Start Bonus brought in 13 completed projects in the second quarter with savings of over 270,000 kWh. In addition to those already completed there are 33 Kick-Start Bonus projects forecast to close by the end of 2012 which will contribute an additional 900,000 kWh.
- Comfort Now Bonus sunset at the end of Q2 with 20 completed projects, contributing over 100,000 kWh, slated to be processed in July 2012.
- The mid-stream buy-down promotion with a regional appliance distributor that was launched in Q1 has seen modest success thus far, and many opportunities for potential growth as the year continues.
- Work with local, regional and national organizations to develop and deploy an on-bill financing pilot called MPower Oregon continued throughout Q2 with the following milestones achieved;
 - HUD EIF Cooperative Agreement completed between MPower Oregon and HUD which allows over \$3M in funds to flow into the pilot
 - MPower Oregon officially becomes an Energy Trust of Oregon Pilot
 - MPower Oregon designated as an EEAST Pilot

How we are positioning the program to achieve savings.

Overall:

- Using the learning's from the HE Clothes Washer mid-stream buy-down promotions, an RFP targeted at key regional appliance distributors was developed to influence the market to purchase energy-efficient refrigerators. The RFP will be released in mid-July.
- A comprehensive lighting pilot targeted at memory care facilities was recently launched and is expected to bring three projects during 2012.

PGE

- PGE results through Q2 show completed projects at 34% of stretch goal. Historically, achievement at the end of Q2 is 24%. During the past two years Existing Multifamily has achieved its PGE stretch goal.
- When year-to-date achievement is combined with forecast and short-cycle savings the program is on track to reach and exceed its conservative goal. As custom and prescriptive savings come in program staff will actively manage the budget and direct install operations to keep within the 2012 budget and maintain savings above stretch goal.
- The run rate of incentive dollars needed to achieve each kWh of savings has been less than budgeted to date, giving leverage to close out Kick Start Bonus offerings without budget implications.
- Existing Multifamily has continued to take steps to conduct studies with affordable housing agencies served primarily by PGE to develop long-term strategies to achieve savings in this underserved market through MPower Oregon.

PAC

- Existing Multifamily achieved results through Q2 exceed 68% of stretch goal. This compares to the historic savings to goal results of 24%.
- When year-to-date achievement is combined with forecast and short-cycle savings the program is on track to reach and exceed stretch goal for 2012.
- The run rate of incentive dollars needed to achieve each kWh of savings has been less than budgeted to date, giving leverage to close qualifying projects leveraging Comfort Now and Kick Start Bonus offerings without budget implications.

NWN

- Results through Q2 for NW Natural show completed projects at 21% of stretch goal. This compares to the historic savings to goal results of 33%
- Program staff has begun to see the expected rise in therm savings in Q2 and Q3 which are typically the warmer quarters of the year when large custom and prescriptive HVAC projects are typically completed and processed.
- When year-to-date achievement is combined with forecast and short-cycle savings the program is still short of the conservative savings goal.
 - This is directly related to a large, internally managed, custom project with a key affordable housing agency that was initiated in 2010 and struggled to obtain financing throughout 2011 and 2012. After extensive efforts by Energy Trust to assist this project in obtaining financing the project is re-energized and is expected to complete during Q4 2013.
- Program staff continued efforts with Planning and Evaluation to add and modify gas measures to diversify program offerings and accelerate gas efficiency projects for the remainder of 2012 and into 2013.

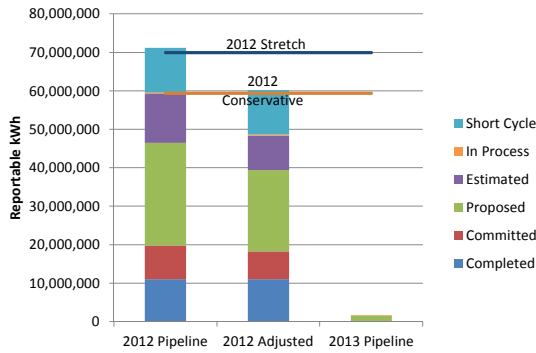
Existing Buildings Summary

July 1, 2012

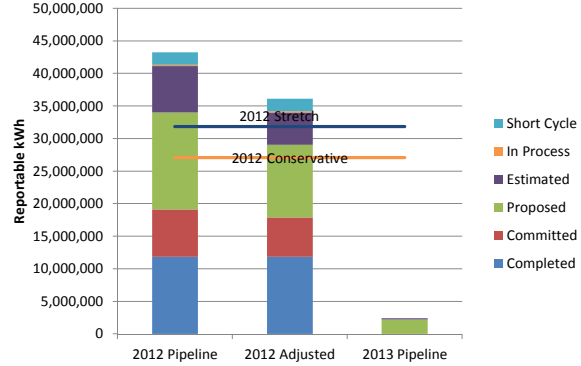
Program: Existing Buildings		PGE	PAC	NWN	CNG
Achievement	2011 Achievement to Date (Rpt kWh or therm)	11,034,585	11,844,544	313,034	34,224
	To date % of Conservative goal	19%	44%	33%	34%
	To date % of stretch goal	16%	37%	28%	29%
Context	Historical % of actual accomplishment	23%	22%	23%	15%
Budget	To Date % of Incentive Budget Spent	15%	40%	39%	22%

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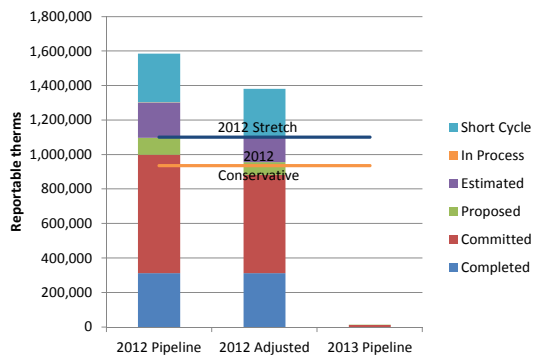
PGE Savings Pipeline 2012-2013



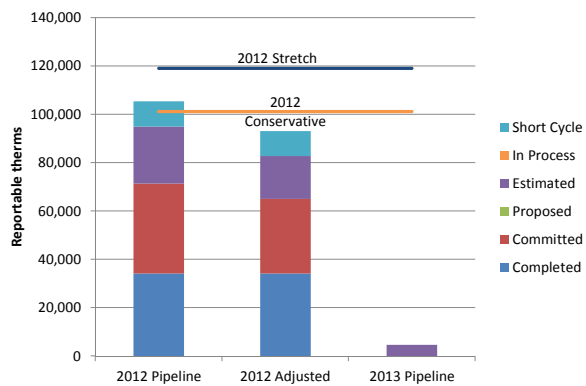
PAC Savings Pipeline 2012-2013



NWN Savings Pipeline 2012-2013



CNG Savings Pipeline 2012-2013



Special Considerations:

Overall:

- The Kick-Start Bonus (KSB) offer, a 20% incentive increase for lighting and custom projects, contributed significantly to the 2012 project pipeline. In order to be eligible for the bonus projects had to have an incentive offer from the program by June 29th.
- As a result of sustained outreach and marketing efforts leveraging the Kick-Start Bonus, the program is well positioned to meet or exceed stretch goals for all utilities.
- The program has been collaborating closely with ODOE on the State's Cool School initiative by providing outreach and planning services to schools to help them leverage ODOE's SB 1149 schools funds. To date Existing Buildings has been in contact with over 30 school districts; 10 of these districts have committed to complete projects by the end of 2012.

PGE

- The program saw a significant surge in projects entering the pipeline as a result of the KSB end date of June 29, 2012; 546 projects are eligible for KSB. The program is on-track to meet the PGE conservative goal and is currently forecast to deliver 86% of the stretch goal. Savings are presently forecast to come from the following program Tracks: Lighting 50%, Custom 28%, Standard 6%, O&M 7% and 80+ 9%. It is still early enough in the year that it is still possible to meet the stretch goal with strategic market initiatives. Increased marketing and outreach efforts are underway for specific target markets for lighting, PC Power Management and VFDs.

PAC

- At the conclusion of the Kick-Start Bonus, 284 projects are eligible for the bonus and the program has a pipeline full of custom and lighting projects. The program is in a position to exceed the 2012 Stretch goal and budget for PacifiCorp with the current forecast indicating that the program will achieve 113% of the stretch goal. Savings are presently forecast to come from the following program Tracks: Lighting 43%, Custom 41%, Standard 4%, O&M 1% and 80+ 11%. Staff informed the Energy Trust board that the program may exceed the incentive budget by up to \$934,000 acquiring additional savings. The program will work to actively manage projects so that this increased budget is not exceeded.

NWN

- The custom project pipeline was strong and the Kick-Start Bonus added another 57 projects to the pipeline. Roof-Top Tune-up (RTU) activity has picked up substantially this year putting the program in a position to achieve 126% of the 2012 stretch goal and exceed the incentive budget. Savings are presently forecast to come from the following program Tracks: Custom 63%, Standard 11% and O&M 26%. The program will be actively managing additional uptake on Custom Project and RTU activity in order to manage the commercial program portfolio to achieve the Commercial Sector NWN stretch goal.

CNG

- The Kick-Start Bonus had a less substantial impact in CNG territory with only 4 projects leveraging the bonus. Nevertheless, the program is presently on-track to meet the Conservative Goal with the current forecast indicating the program will yield 78% of the stretch goal. Savings are presently forecast to come from the following program Tracks: Custom 73%, Standard 16% and O&M 11%. Program staff is in the process of developing an updated Steam Trap direct install initiative. Direct marketing and outreach should allow the program to push this initiative and other measures to help the program meet the stretch goal by the close of the year.

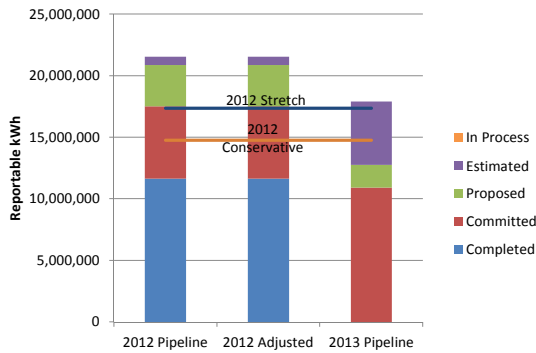
New Buildings Summary

July 1, 2012

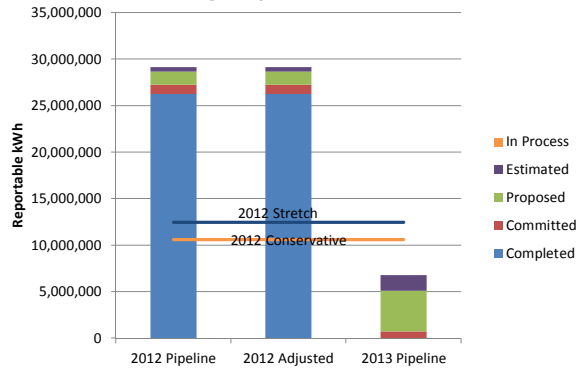
Program: New Buildings		PGE	PAC	NWN	CNG
Achievement	2012 Achievement to Date (Rpt kWh or therm)	11,655,966	26,258,466	171,340	8,618
	To date % of Conservative goal	79%	248%	40%	23%
	To date % of stretch goal	67%	211%	34%	20%
Context	Historical % of actual accomplishment	21%	13%	22%	53%
Budget	To Date % of Incentive Budget Spent	48%	60%	27%	18%

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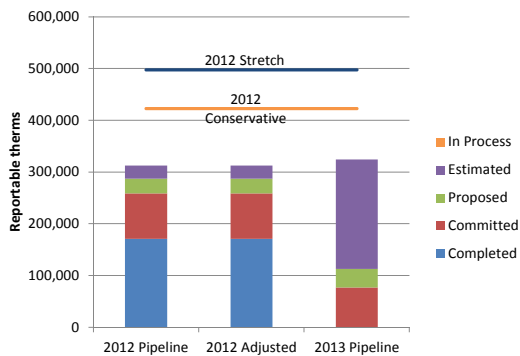
PGE Savings Pipeline 2012-2013



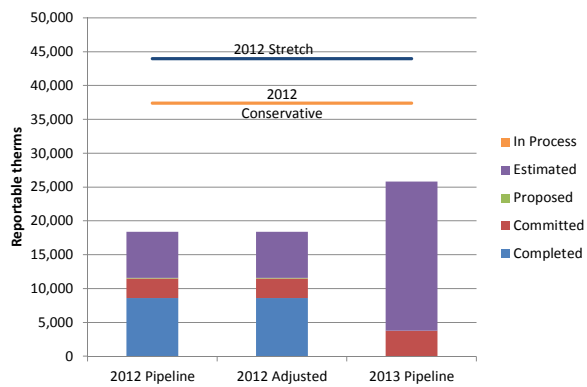
PAC Savings Pipeline 2012-2013



NWN Savings Pipeline 2012-2013



CNG Savings Pipeline 2012-2013



Special Considerations:

Overall

- The New Buildings pipeline is strong across electric utilities with large projects bringing in a majority of the electric savings this year. Program staff is seeing signs of economic recovery in the number of new project enrollments for 2012 and 2013 pipeline development.
- Electric savings for the quarter are more than double this time last year, due to an increase in same year enrollments driven by projects in the industrial, multi-family and grocery market sectors unexpectedly enrolling early this year. Increased incentive demand and savings are expected for electric utilities, resulting in a much lower levelized cost for the year than anticipated.
- Gas savings for NWN are down from last quarter due to many small changes in savings estimates and a few projects moving out of 2012. Gas savings for CNG were ahead, as projected in Q1, but fell behind due to two large projects not coming through. Program staff are taking steps to boost results in the second half of the year, including tapping existing projects for more savings, enrolling quick-turn projects like restaurants and reaching out to New Building Allies.
- Program staff are starting to see project enrollments pick-up from New Building Design Allies as they begin to work closely with the program. This result builds from a program strategy started in 2011 to build and create a market position for allies.
- With the launch of two new program offerings, the Market-Specific Incentive Offering for small commercial and the Data Center Offering, the program is bringing a more comprehensive approach to capture deeper savings and grow the 2013 pipeline.

Market-Specific Incentive Offering

- Based on the successful results of the 2009-2011 Small Commercial Efficiency Pilot, a mainstream small commercial offering will be rolled out in 2012 to more comprehensively serve the needs of the small commercial market. The phased rollout with the first phase launching in May, targeting office, retail and restaurant buildings less than 50,000 square feet. The second phase may include grocery, schools and multifamily buildings, expected to launch in July. The new offers are comprehensive packages of measures with modeled savings meeting three main objectives: provide simple, achievable bundles of measures that encourage incrementally higher savings; allow flexibility for buildings that have a variety of operating characteristics or want to make measure substitutions or select additional elective measures; and incentivize more efficient HVAC design choices. This builds from current prescriptive measures, where historically, small buildings install two to three measures. By driving high efficiency HVAC and lighting at the core and offering 11 elective measures, program staff can help customers do more and estimate savings of 12 – 20% for retail and 4 – 8% for office, (restaurants are being analyzed). Incentives will be paid on a per square foot basis, savings graduate depending on the customer's appetite. The expected near term impact will be in the number of enrollments in 2012, increased savings results are expected in 2013 and 2014 as projects close. For perspective on the market, the program closed 270 projects last year that were less than 50,000 square feet, office and retail are some of the major building types program staff can influence.

Data Center Offer

- Oregon has seen unprecedented growth in data centers over the past few years, a trend we see continuing. While this affords the New Buildings program with the opportunity to capture large savings through custom analysis, the full savings potential may be missed without a specific program offer that scales with the market potential. The new offer, launching in July, is a series of incremental changes that will streamline the process, is scaled to meet the needs of large enterprise, mid-tier, localized and small that range in size anywhere from >10MW load data server "farm" to an office building with a <10kW load. The new offer will emphasize early involvement through design assistance, focus heavily on IT design, and introduce new measures like power supply and power distribution. In cases where early design assistance is not warranted due to the limited scope of a project, such as with an office data closet or room, straightforward standard measures will be available. The expected near term impact will be building awareness with many market actors, working with project teams to set high goals, and begin design and engineering processes where professional design incentives will be leveraged to maximize savings results. In 2013, results are expected to be significant and drive down program levelized cost with a few completed projects.

PGE

- Based on the current pipeline the program is currently forecasted to exceed the PGE stretch goal by over 24%. This is due in part to ten large projects completing this year, one completing with over 1.5 million kWh more electric savings than originally estimated, and an unexpected increase in same year enrollments from industrial, multi-family and large grocery projects. With a \$500,000 incentive increase, the program expects to achieve a total of 23 million kWh this year.

PAC

- Due to a large project delivering significant savings that closed in Q2 the program has exceeded stretch goal, delivering highly cost-effective savings 134% over the stretch goal. A majority of the savings through the end of the year will come from grocery and small commercial projects.

NWN

- Program staff currently forecasts reaching 74% of the conservative savings goal. New Buildings is in a good position at this point in the year to drive more quick-turn opportunity with measures that are simple and cost-effective for customers to install. This year's results are similar to last year's for NWN, although large electric savings are magnified with datacenter projects hitting the incentive cap. Over the last half of the year program staff will drive results by focusing on solar thermal applications and quick-serve restaurants to meet or exceed the conservative goal.

CNG

- New Buildings was forecast to exceed stretch goal earlier in the year, however, the program is forecasted to meet 49% of the conservative savings goal, due to larger projects shifting and dropping (one selecting propane) and final project energy analysis reports showing slightly lower savings than expected for a couple of projects. To reach CNG goal, the program is focusing outreach staff to seek any same-year savings to get more out of current projects and enroll quick-turn projects like restaurants. These efforts will also lead to building a strong 2013 project pipeline.

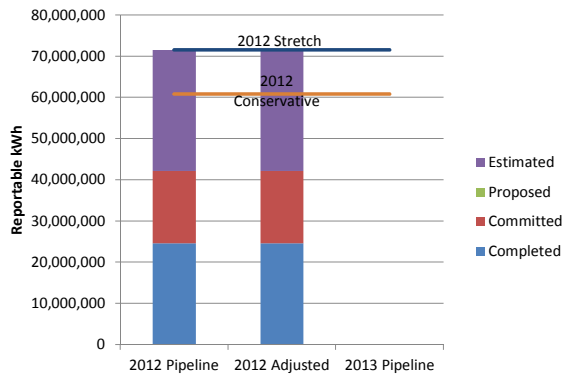
Residential Programs Summary

July 1, 2012

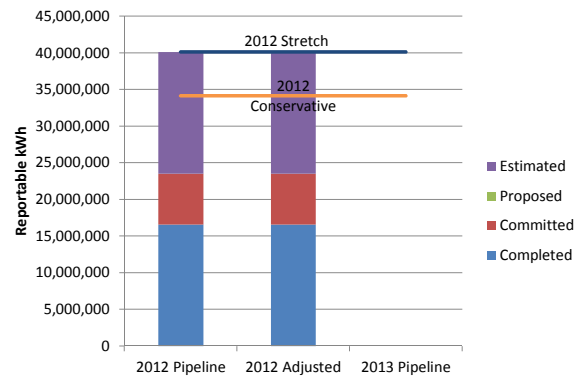
Residential Sector		PGE	PAC	NWN	CNG
Achievement	2012 Achievement to Date (Rpt kWh or therm)	24,580,506	16,567,672	713,031	33,344
	To date % of Conservative goal	40%	49%	39%	32%
	To date % of stretch goal	34%	41%	33%	27%
Context	Historical % of actual accomplishment	46%	37%	52%	31%

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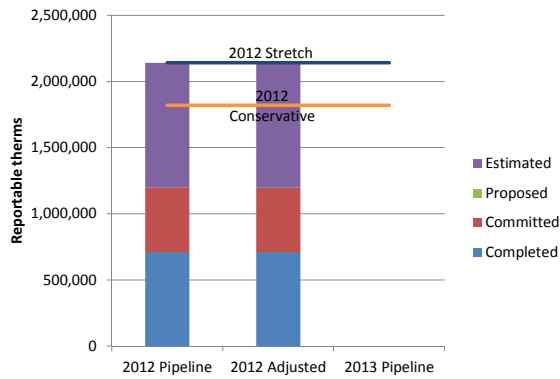
PGE Savings Pipeline 2012-2013



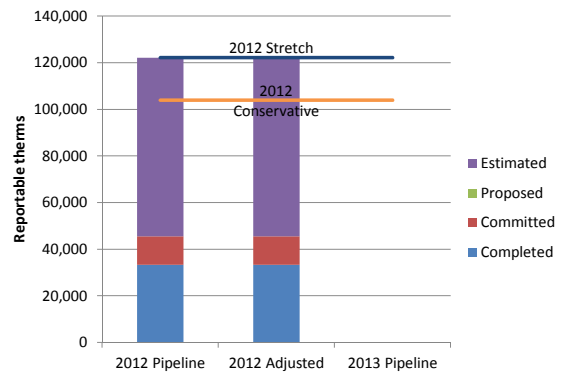
PAC Savings Pipeline 2012-2013



NWN Savings Pipeline 2012-2013



CNG Savings Pipeline 2012-2013



2012 Adjusted Pipeline percent of Stretch Goal	
PGE: 100%	PAC: 100%
NWN: 100%	CNG: 100%

Special Considerations:

Overall

- EPS new homes are expected to stay strong through July with an expected slowdown after that as the market transitions to the new Energy Star spec, but putting us well over our original forecasted goal for the year.
- Launch of home tour season with Ultimate Open House in April.
- EPS sheets with new look and feel was introduced to marketplace.
- Savings from direct install measures continue to be lower than budgeted and will be a key focus during Q3 & Q4.

PGE

- Fridge recycling print, web and radio ads released to integrate with "Empty Nester" theme.
- Excluding the OPOWER pilot savings target, Existing Homes has achieved 40 percent of the 2012 stretch goal through Q2.
- Ductless heat pumps continue to show strong growth compared to last year (109 percent) while water heaters continue to see negative growth (63 percent) driven by decreases in solar hot water and solar pool heat as well as Marathon water heaters (PGE ran a promotion of marathons during Q1 2011 which did not occur in 2012).
- Retail showerheads and refrigerator recycling are currently behind historical averages.
 - The program is exploring opportunities to include additional LED products in retail lighting program for the remainder of 2012 and in preparation for 2013 budget.
 - The program is also looking at adding Advanced Power Strips to limited retail locations.
 - Developing limited time promotional offer with packaged shower wands at retail to increase product diversity and boost sales in 2012.
 - Increased summer and fall fridge recycling TV and radio.

PAC

- Fridge recycling print, web and radio ads released to integrate with "Empty Nester" theme.
- Savings through Q2 are primarily being driven through Energy Saver Kits, Existing Mobile Homes and strong performance in Single-family prescriptive measures which combined make up 89 percent of total savings.
- Expanded PGE community office engagement to include distribution of low income kits.
- Savings within Reach has grown 129 percent compared to the same period last year.
- Through Q2, ductless heat pump installations have increase 59 percent compared to 2011.
- Water Heating savings (not including water conservation devices) have increased 51 percent compared to 2011, driven primarily by the Heat Pump Water Heater pilot.

NWN

- Excluding the OPOWER pilot savings target, Existing Homes has achieved 46 percent of the stretch savings goal.
- Hot water measures (not including ISMs) continue to remain behind last year by 30 percent which is being driven by fewer tankless water heaters and the elimination of .62 water heaters.
- NWN bill insert created for showerheads (June).
- Weatherization savings have decreased 2 percent compared to last year; however, Q2 saw significant growth (64 percent) which was heavily driven by Clean Energy Works Oregon projects.
- Gas Hearths continue to see strong growth (49 percent year-to-date) and have achieved 56 percent of their 2012 savings goal.
- Savings for new homes and products are currently behind historical averages due to slow uptake of retail showerheads and the air sealing pilot. The following strategies are being incorporated to ensure savings goals stay on track.
 - New Homes Stand Alone options being explored as a way to capture additional savings in 2012 and in preparation for 2013 budget.
 - Focusing on low income kit distribution channels in NWN territory and added aerators to kits.
 - Developing limited time promotional offer with packaged shower wands at retail to increase product diversity and boost sales in 2012.
 - Explore opportunities with Sears to introduce showerheads to their product line up.

CNG

- Through Q2 Existing Homes has achieved 25 percent of the stretch savings goal for the year and has seen a 33 percent decrease from the same period last year. This decrease however can be contributed to custom small multifamily project that occurred during Q2 last year in Sunriver.
- Existing Homes is working with a market actor in the Central Oregon region to support a bulk purchase promotion of Energy STAR gas tank water heaters and gas hearths in the Sunriver community. Additionally, 15 small multifamily buildings at Sunriver are anticipated to receive weatherization improvements in Q4 and will contribute significantly to savings goals.
- Weatherization savings have decreased by 26 percent compared to last year, however, Q2 only saw a 5 percent decrease compared to last year. The primary driver to this decrease comes from duct & air sealing measures. As Clean Energy Works projects being to close in Q3/Q4 the program is expecting to see a continued improvement in weatherization measures.
- To overcome this shortfall in savings many efforts underway to ensure savings goals are met.
 - Focus on key products (i.e. 0.67 water heaters and gas hearths). There is currently a 43 unit gas fireplace project that is awaiting HOA approval.
 - Recruitment of contractors is targeted for HVAC and Weatherization in Bend, Madras, Redmond, and surrounding areas.
 - The existing homes program has Identified two CNG Small Multifamily properties with 150 units that have gas DHW.
 - Work with Neil Kelly and the Sunriver HOA to promote Gas Fireplaces & Energy Star Water Heaters as well as direct install of Instant Savings Measures during installation with the goal of 150 of each as well as direct install of instant savings measures in 500 homes.

Existing Homes Summary

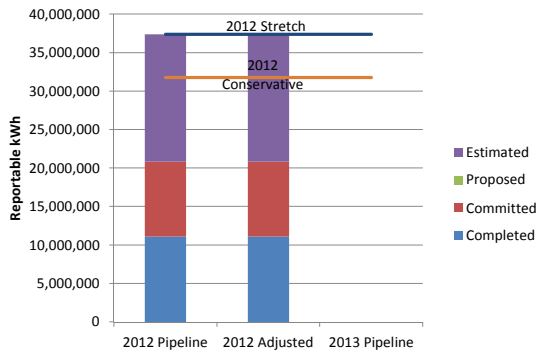
July 1, 2012

Program: Existing Homes		PGE	PAC	NWN	CNG
Achievement	2012 Achievement to Date (Rpt kWh or therm)	11,119,063	8,863,666	551,494	21,764
	To date % of Conservative goal	35%	60%	40%	30%
	To date % of stretch goal	30% *	51%	34% *	25%
Context	Historical % of actual accomplishment	50%	33%	53%	29%
Budget	To Date % of Incentive Budget Spent	37%	49%	33%	15%

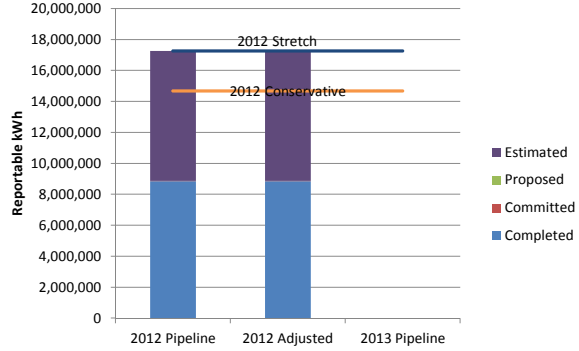
* OPOWER Pilot Savings achievement is committed and not yet recognized.

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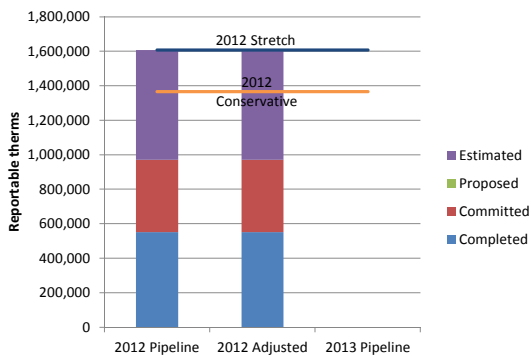
PGE Savings Pipeline 2012-2013



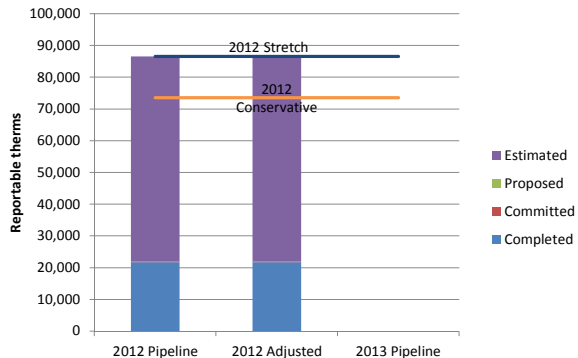
PAC Savings Pipeline 2012-2013



NWN Savings Pipeline 2012-2013



CNG Savings Pipeline 2012-2013



Special Considerations:

Overall:

- Weatherization measure activity across all utilities has increased compared to Q1.
- Savings from direct install measures continue to be lower than budgeted and will be a key focus during Q3 & Q4.

PGE

- Excluding the OPOWER pilot savings target, Existing Homes has achieved 40 percent of the 2012 stretch goal through Q2.
- Ductless heat pumps continue to show strong growth compared to last year (109 percent) while water heaters continue to see negative growth (63 percent) driven by decreases in solar hot water and solar pool heat as well as Marathon water heaters (PGE ran a promotion of marathons during Q1 2011 which did not occur in 2012).
- Weatherization savings remain unchanged compared to last year.

PAC

- Through Q2 Pacific Power remains on target to achieve the 2012 stretch savings goal. Year-to-date Existing Homes has achieved 51 percent (8.85M kWh) of the 2012 stretch goal (17.27M kWh) and utilized 49 percent of the incentive budget.
- Savings through Q2 are primarily being driven through Energy Saver Kits, Existing Mobile Homes and strong performance in Single-family prescriptive measures which combined make up 89 percent of total savings.
- Savings within Reach has grown 129 percent compared to the same period last year.
- Through Q2, ductless heat pump installations have increase 59 percent compared to 2011.
- Water Heating savings (not including water conservation devices) have increased 51 percent compared to 2011, driven primarily by the Heat Pump Water Heater pilot.

NWN

- Excluding the OPOWER pilot savings target, Existing Homes has achieved 46 percent of the stretch savings goal.
- Hot water measures (not including ISMs) continue to remain behind last year by 30 percent which is being driven by fewer tankless water heaters and the elimination of .62 water heaters.
- Weatherization savings have decreased 2 percent compared to last year; however, Q2 saw significant growth (64 percent) which was heavily driven by Clean Energy Works Oregon projects.
- Gas Hearths continue to see strong growth (49 percent year-to-date) and have achieved 56 percent of their 2012 savings goal.

CNG

- Through Q2 Existing Homes has achieved 25 percent of the stretch savings goal for the year and has seen a 33 percent decrease from the same period last year. This decrease however can be contributed to custom small multifamily project that occurred during Q2 last year in Sunriver.
- Existing Homes is working with a market actor in the Central Oregon region to support a bulk purchase promotion of Energy STAR gas tank water heaters and gas hearths in the Sunriver community. Additionally, 15 small multifamily buildings at Sunriver are anticipated to receive weatherization improvements in Q4 and will contribute significantly to savings goals.
- Weatherization savings have decreased by 26 percent compared to last year, however, Q2 only saw a 5 percent decrease compared to last year. The primary driver to this decrease comes from duct & air sealing measures. As Clean Energy Works projects begin to close in Q3/Q4 the program is expecting to see a continued improvement in weatherization measures.
- The Q2 decision to focus the Prescriptive Duct Repair & Sealing pilot outside of CNG territory will require the Existing Homes program to offset a 10k therm deficit during Q3/Q4. This will be primarily accomplished through a focus on key products (i.e. 0.67 water heaters and gas hearths).

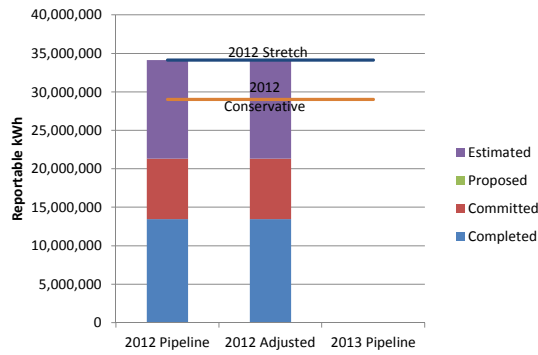
New Homes And Products Summary

July 1, 2012

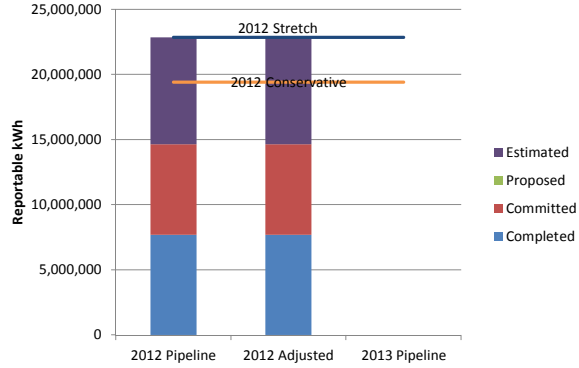
Program: New Homes & Products		PGE	PAC	NWN	CNG
Achievement	2012 Achievement to Date (Rpt kWh or therm)	13,461,443	7,704,006	161,537	11,581
	To date % of Conservative goal	46%	40%	36%	38%
	To date % of stretch goal	39%	34%	30%	32%
Context	Historical % of actual accomplishment	40%	40%	40%	35%
	To Date % of Incentive Budget Spent	41%	35%	58%	25%

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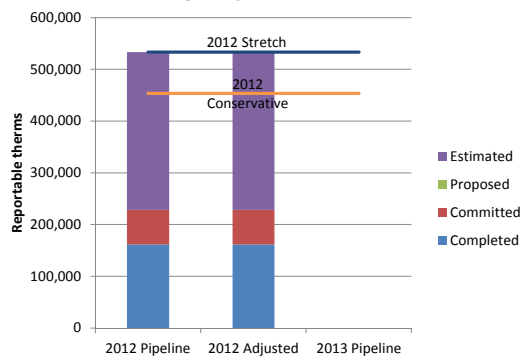
PGE Savings Pipeline 2012-2013



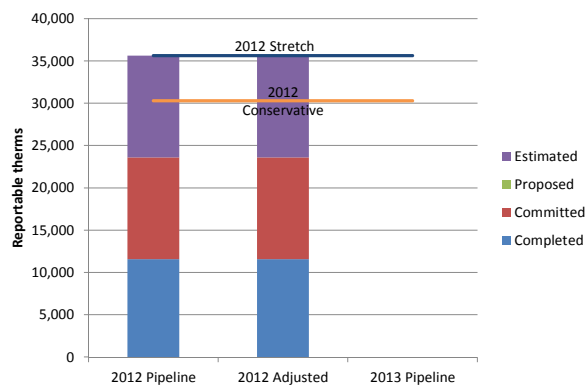
PAC Savings Pipeline 2012-2013



NWN Savings Pipeline 2012-2013



CNG Savings Pipeline 2012-2013



Special Considerations:

Overall:

- The New Homes program continues to go strong with the number of EPS homes expected to significantly exceed the goal for the year.
- Launch of home tour season with Ultimate Open House in April.
- EPS sheets with new look and feel was introduced to marketplace.
- EPS new verifier trainings underway to support transition to free market verification with over 30 new verifiers trained.
- Air sealing pilot insulation contractor group, trainings and baseline home testing underway.
- Field study on qualifying water heater availability at retail completed to support Existing Homes.
- Retail showerheads and refrigerator recycling are currently behind historical averages.

PGE

- Fridge recycling print, web and radio ads released to integrate with "Empty Nester" theme.
- Expanded PGE community office engagement to include distribution of low income kits.
- Q3 launch of six month pilot of market lift strategy with CFL product at big box retailer(s).
- Refrigerator recycling is currently behind historical averages.
 - The program is exploring opportunities to include additional LED products in retail lighting program for the remainder of 2012 and in preparation for 2013 budget.
 - The program is also looking at adding Advanced Power Strips to limited retail locations.
 - Increased summer and fall fridge recycling TV and radio.

PAC

- Fridge recycling print, web and radio ads released to integrate with "Empty Nester" theme.
- Discussions started to possibility distribute low income kits through community action agencies in coordination with Pacific Power.
- RTF has released new High Performance Manufactured Home (HPMH) spec.
- Q3 launch of six month pilot of market lift strategy with CFL product at big box retailer(s).
- Retail showerheads and refrigerator recycling are currently behind historical averages.
 - The program is exploring opportunities to include additional LED products in retail lighting program for the remainder of 2012 and in preparation for 2013 budget.
 - The program is also looking at adding Advanced Power Strips to limited retail locations.
 - Developing limited time promotional offer with packaged shower wands at retail to increase product diversity and boost sales in 2012.
 - Increased summer and fall fridge recycling TV and radio.

NWN

- NWN bill insert created for showerheads (June).
- Savings are currently behind historical averages due to slow uptake of retail showerheads and the air sealing pilot.
 - New Homes Stand Alone options being explored as a way to capture additional savings in 2012 and in preparation for 2013 budget.
 - Focusing on low income kit distribution channels in NWN territory and added aerators to kits.
 - Developing limited time promotional offer with packaged shower wands at retail to increase product diversity and boost sales in 2012.
 - Explore opportunities with Sears to introduce showerheads to their product line up.

CNG

- City of Redmond continues to request showerheads for distribution to their customers.
- Savings are currently behind historical averages due to slow uptake of retail showerheads and the air sealing pilot.
 - New Homes Stand Alone options being explored as a way to capture additional savings in 2012 and in preparation for 2013 budget.
 - Focusing on low income kit distribution channels in CNG territory and added aerators to kits.
 - Developing limited time promotional offer with packaged shower wands at retail to increase product diversity and boost sales in 2012.

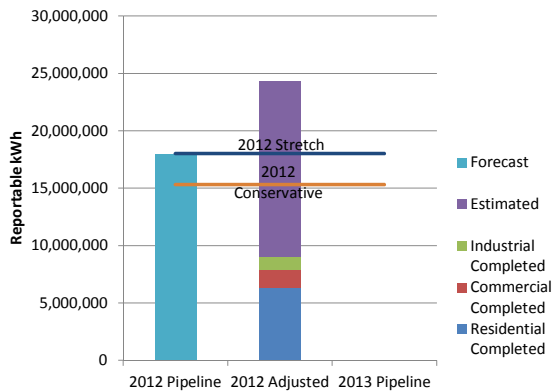
Market Transformation Summary

July 1, 2012

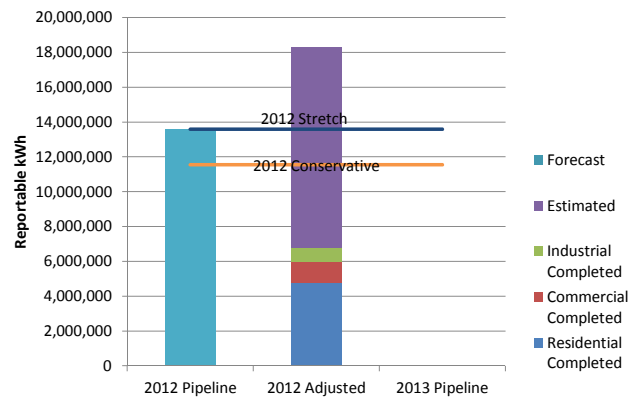
Program: Market Transformation		PGE	PAC	NWN	CNG
Achievement	2012 Achievement to Date (Rpt kWh or therm)	9,006,512	6,794,384	157,826	15,458
	To date % of Conservative goal	59%	59%	58%	69%
	To date % of stretch goal	50%	50%	49%	58%
Context	Historical % of actual accomplishment	59%	58%	63%	91%
Budget	To Date % of Incentive Budget Spent	N/A	N/A	N/A	N/A

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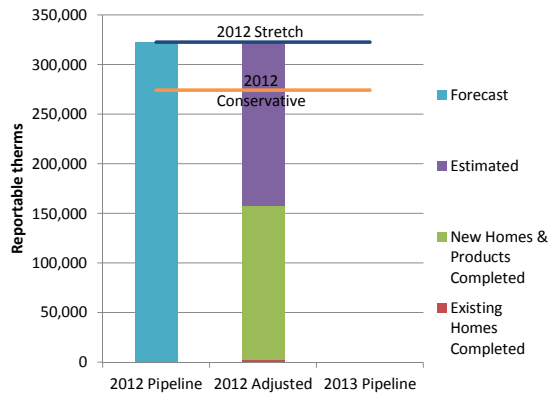
PGE Savings Pipeline 2012-2013



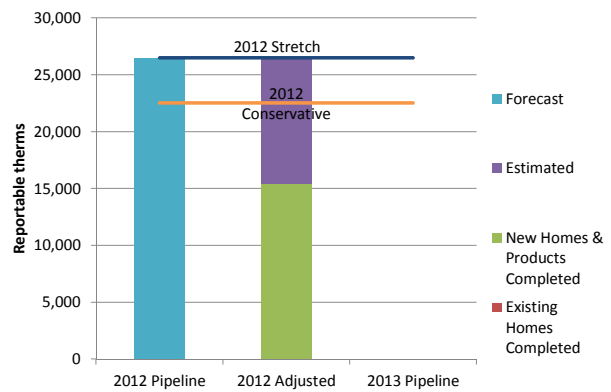
PAC Savings Pipeline 2012-2013



NWN Savings Pipeline 2012-2013



CNG Savings Pipeline 2012-2013



NEEA

- The increases in the forecast for 2012 are largely in the commercial sector, where expectations have increased or the commercial real estate, commercial building code, and commercial desktop initiatives are higher than previously estimated.
- These savings estimates are still early and somewhat volatile. NEEA will provide future updates to these savings estimates in early November and again in early January before the final savings for the year will be claimed.