Conservation Advisory Council Agenda

November 20, 2019
1:30 p.m. – 4:30 p.m.
421 SW Oak St., #300, Portland, OR 97204

1:30 Welcome, old business and short takes *(information and Q&A)*

- Introductions, agenda review and approve September 19 meeting minutes
- Review previous meeting follow-ups
- 2020 meeting dates
- 2020-2024 Strategic Plan approved by board (Q&A)
- Large electric customer funding analysis (Q&A)

1:50 2020 Budget update *(Q&A)*
Director of Energy Programs Peter West will provide an overview of changes to the Draft 2020 Budget and 2020-2021 Action Plan and summarize public and stakeholder feedback received. These changes will be reflected in the Final Proposed 2020 Budget and 2020-2021 Action Plan presented to the board in December.

2:20 Diversity Advisory Council update (*Q&A)*
Communications and Customer Service Sr. Manager Sue Fletcher will provide an update on the formation of the Diversity Advisory Council, member recruitment, current and upcoming activities.

2:35 Bonneville Power Administration program update *(Q&A)*
Dave Moody of Bonneville Power Administration will present on the evolution of BPA's energy efficiency programs.

3:00 Break

3:10 New Buildings proposed exception *(Q&A)*
Energy Trust senior program manager Jessica Iplikci will cover planning for New Building program changes to respond to the state's new code.

3:40 Residential campaign *(Q&A)*
Program marketing manager Mana Haeri will present an overview of a new, residential marketing campaign, "Save For," including campaign development process, Spanish transcreation, and example creative.

4:00 Multifamily Program Assessment *(Q&A)*
Commercial Program Manager Kate Wellington will present the outcomes of the 2019 multifamily program assessment, including key priorities for 2020 and the upcoming RFP for 2021 services.

4:30 Adjourn

Meeting materials (agendas, presentations and notes) are available online.

Next meeting: This is the last meeting of the year, thank you for your time and dedication to supporting the implementation of Energy Trust's energy efficiency programs. Our next meeting is currently scheduled for Wednesday, February 19, 2020.

Conservation Advisory Council Meeting Notes

September 18, 2019

Attending from the council:

Warren Cook, Oregon Department of Energy
Kari Greer, Pacific Power
Julia Harper, Northwest Energy Efficiency Alliance
Tim Hendricks, Building Owners and Managers Association (phone)
Anna Kim, Oregon Public Utility Commission
Jason Klotz, Portland General Electric
Lisa McGarity, Avista (phone)
Kerry Meade, Northwest Energy Efficiency Council
Dave Moody, Bonneville Power Administration
Alyn Spector, Cascade Natural Gas
Danny Grady, City of Portland
Rick Hodges, NW Natural (for Holly Braun)

Attending from Energy Trust:

Caryn Appler
Kathleen Belkhayat
Melanie Bissonnette
Quinn Cherf
Amber Cole
Ryan Crews
Hannah Cruz
Becky Engel
Sue Fletcher
Fred Gordon
Jackie Goss
Jack Cullen
Ronald Haynes
Marshall Johnson
Steve Lacey
Oliver Kesting
Jessica Kramer
Scott Leonard
Spencer Moersfelder
Nancy Morales
Jay Olson
Amanda Potter
Eric Sayre
Kenji Spielman
Cameron Starr
Thaddeus Steerman
Greg Stokes
Jay Ward
Kate Wellington
Peter West

Others attending:

Shelly Beaulieu, TRC
Rachel Dawson, Cascade Policy Institute
Jon Eichler, ICF
Lindsey Hardy, Energy Trust board (phone)
Karla Hendrickson, ICF
Jacob Jones, Nexant
Debbie Kitchin, Energy Trust board
Brian Lynch, AESC
Don MacOdrum, TRC
Joe Marcotte, LM Energy
Alan Meyer, Energy Trust board
John Molnar, Rogers Machinery
Stephanie Petit, CLEAResult
Whitney Rideout, Evergreen
Rory Schmick, Stillwater Energy
Ryan Shanahan, Earth Advantage

1. Welcome, old business and short takes

Hannah Cruz convened the meeting at 1:35 p.m. The agenda, notes and presentation materials are available on Energy Trust's website at www.energytrust.org/about/public-meetings/conservation-advisory-council-meetings/. The meeting was recorded on GoToMeeting. If you'd like to refer to the meeting recording for further detail on any of these topics, email info@energytrust.org.

Hannah introduced the agenda. The July meeting minutes were approved with no changes.

Hannah provided an overview of the strategic planning process. Energy Trust received comments from 27 organizations around the state. Feedback about the five focus areas was generally positive, and organizations generally indicated agreement that focus area one is the priority for Energy Trust. Comment responses will be handled differently this year due to the high volume of comments. Energy Trust will present to the board comments organized by theme for review and discussion. The final proposed strategic plan will be presented at the October 16 board meeting for board consideration, and the plan will be shared with council members at the November meeting.

Hannah informed members that all advisory council members are invited to a social hour on October 15 to allow members of the board and three advisory councils to network and get to know one another.

2. Year-end forecast

Topic summary

Director of Energy Programs Peter West highlighted Energy Trust's progress to achieving its 2019 annual energy efficiency goals, including current savings and generation by utility as well as 2019 forecast for each. Energy Trust expects to fall short of 2019 goals for some gas and electric utilities due to construction equipment and labor price increases, and shortages in labor that can delay or reduce the size of projects. Lighting participation also is down due to tariffs and a decrease in Energy Trust's incentive amounts.

Areas that are performing better than expected include new homes, residential retail and midstream offerings, Existing Multifamily, commercial/industrial Strategic Energy Management, prescriptive industrial and agriculture incentives, and Existing Buildings offerings for Avista and Cascade Natural Gas.

Energy Trust has begun looking at increasing custom and prescriptive incentives for gas territories. Incentives have been increased for PGE and Pacific Power customers for lighting, including for direct installation for commercial customers. Energy Trust has increased outreach for residential lighting and Energy Saver Kits for PGE and NW Natural customers and has begun a smart thermostat marketing campaign.

Discussion

Anna Kim asked how savings compare to last year at this time. Staff will check and follow up.

Next Steps

Energy Trust will continue to update council members about progress to goals and efforts to increase participation and savings.

3. 2020 action plans preview

Topic summary

Members received an overview of in-progress 2020 action plans for each sector, including context, new strategies for 2020 and any significant changes from 2019. Presenters included Residential Program Manager Marshall Johnson, Commercial Sector Lead Oliver Kesting and Industrial and Agriculture Sector Lead Amanda Potter.

Among the factors influencing Residential program action plans, Marshall Johnson explained that the federal Energy Independence and Security Act (EISA) standards for incandescent bulbs will not got into effect in 2020. As a result, Energy Trust will maintain a retail lighting presence in 2019 and 2020. Other factors impacting the Residential program include declines in new construction savings and a decline in savings from ductless heat pumps and gas furnaces in

rental properties. In the future, the Residential program will make strategic changes to improve savings and outreach, including expanding participation, expanding utility-driven programs, making shifts to reflect new building code in 2021, and launching new measures and new pilot offerings.

Oliver Kesting noted commercial sector savings decreases and described key activities in 2019, including marketing campaigns in outlying areas and working with utilities and many partner organizations to expand Energy Trust's reach. New activities include more efforts with schools; new pilots that will launch this year through 2020; location-specific incentives; and releasing a request for proposals for program management and delivery services for the Existing Multifamily program, Existing Buildings program, and commercial and industrial lighting.

Amanda Potter explained that savings in the industrial and agriculture sector are decreasing because of fewer custom opportunities with larger customers, less lighting savings and the impact of the strong economy and tariffs on available labor and project costs. Future program efforts to mitigate the effects of these market conditions, including an request for proposals for delivery of commercial and industrial lighting offerings, a lighting pilot, new measures and an evolution of the industrial Strategic Energy Management offering to support smaller customers. Changes in 2020 include increasing in custom and lighting incentives, reaching small- to medium-sized customers and launching new standard measures.

Discussion
Members asked questions about the causes for declines in Residential program participation (Julia Harper) and the timing for code changes (Warren Cook). Julia Harper also asked if Energy Trust would extend the successful industrial and agriculture network pilot to the commercial sector.

Next Steps
Peter West encouraged council members to attend the October 16 budget workshop for more information about Energy Trust's draft 2020 budget and action plans.

4. 2020 program and measure changes
Topic summary
Staff provided further details on measure and program changes in development for 2020, including a status on measures with OPUC cost-effectiveness exception requests. Scott Leonard, senior residential project manager, described Residential program measure changes and new measures for 2020. Kate Wellington, Existing Multifamily program manager, provided an overview of Existing Multifamily program changes and new measures for 2020. Jay Olson, Existing Buildings program manager, provided an overview of Existing Buildings measure changes and new measures, including new pilot programs and targeted load management support.

Jessica Kramer, industrial and agriculture program manager, Kate Wellington and Jay Olson shared an update about future lighting strategies to support commercial and industrial sector customers, including how the changes in lighting may influence projected savings. This discussion provided more detail about the forthcoming competitive solicitation for delivery of commercial and industrial lighting offerings, which will be issued in 2020.

Discussion
During the discussion about residential measure changes, members asked about who receives the incentives for new central air conditioning measures (Alan Meyer), requirements around baseboard removals for ductless heat pump incentives (Danny Grady) and how many products are qualified for smart thermostat incentives (Warren Cook).

Marshall Johnson also explained NEEA's incentives for smart thermostats, and Julia Harper mentioned NEEA's instant coupons for smart thermostats. Members asked questions about the air exchange data cited in the meeting (Anna Kim and Warren Cook), the definition of fireplace savings and whether Energy Trust would pursue incentives for wood-burning fireplaces (Julia Harper and Jason Klotz).

Jason Klotz also asked question about net zero and smart grid incentives and whether there is a renewable component to the smart grid incentives.

Members asked about the impact on cost-effectiveness for expanding Savings Within Reach (Anna Kim) and about water heating savings (Alan Meyer). Members asked questions about air conditioner incentives and the potential impacts on peak (Jason Klotz). Fred explained that the purpose of Energy Trust's air conditioner incentives is to encourage people to invest in a more efficient model. The existing incentive amount is not enough to catalyze someone not already considering a purchase to consider purchasing one. Jason Klotz encouraged Energy Trust to be sensitive to the impact of these incentives on peak demand.

During the discussion about Existing Multifamily, members asked if Energy Trust has trends about air conditioners (Anna Kim) and whether air conditioner incentives are only for homes with natural gas or if they will apply to electric customers (Alyn Spector). Questions were also asked about potential incentive changes for custom offerings (Dave Moody), the ability to change the pool size requirements for pool heater incentives (Jason Klotz) and if the clothes dryer incentive was for electric customers only (Lisa McGarity).

During the discussion about Existing Buildings, members asked if Energy Trust offers pool cover incentives and whether chemicals and other savings were measured as part of the non-energy benefits (Lisa McGarity). Members also asked how many sites Energy Trust will target for the network lighting controls pilot (Anna Kim).

During the discussion about commercial and industrial sector measure changes, members asked how long the program management and delivery competitive solicitation process will take (Anna Kim). Peter West explained that the decision of the selected Program Management Contractor will be recommended to the board at the July 2020 board meeting. Julia Harper offered NEEA's support to Energy Trust to leverage its data and insights from other NEEA relationships and programs.

Next Steps
More details about program and measure changes will be shared at the November meeting. Members are encouraged to attend. Jason Klotz requested more data about the market size for pool pumps.

5. Board nominating committee
Topic summary
Debbie Kitchin, board member and chair of the board's nominating committee, presented an overview of the current member composition of the board and the board's functions and responsibilities. Energy Trust will begin recruiting two new board members in late 2019 to fill the positions of existing board members who will step down in February 2020.

Debbie described the recruitment process, including methods to recruit more members who bring broad perspectives, skills and experiences that complement those of existing board members. Debbie shared feedback from past recruitment efforts that could improve future

recruiting efforts. The timeline for the board recruitment process will be determined soon. Nominations will go to the board for approval.

She then invited council input about the skills, experience and perspectives the nominating committee should consider when recruiting for board members.

Discussion
Members asked how many positions need to be outside Portland (Anna Kim) and whether someone living in Vancouver but working in Portland could be considered (Alyn Spector).

Council members provided suggestions to the nominating committee about relevant skills to consider in future candidates, including climate experience (Warren Cook) and someone with background in finance, trading markets and commodities (Kerry Meade).

Next Steps
Alyn Spector suggested Energy Trust determine if a potential candidate living in Vancouver with professional experience in Portland could apply to serve on the board. An announcement about the recruitment process will go out this fall, with selection of new members by February 2020.

6. Public comment
There was no public comment.

7. Meeting adjournment
The meeting adjourned at 4:10 p.m.

Council members are invited to attend the social hour on Tuesday, October 15 to meet other advisory council members and the board of directors.

The next meeting is the budget workshop with the board and other advisory councils on Wednesday, October 16, 2019. The last Conservation Advisory Council meeting of the year is Wednesday, November 20. Meeting dates for 2020 are forthcoming.

2020 Conservation Advisory Council Meeting Dates

November 2019

January	No meeting
February	Wednesday, 2/19, 1:30 p.m.
March	No meeting
April	Wednesday, 4/22, 1:30 p.m.; potentially joint with DAC and RAC
May	No meeting
June	Wednesday, 6/17, 1:30 p.m.
July	Wednesday, 7/29, 1:30 p.m.
August	No meeting
September	Wednesday, 9/16, 1:30 p.m.
October	Wednesday, 10/14, time to be announced; draft budget workshop
November	Wednesday, 11/18, 1:30 p.m.
December	No meeting

Meeting start times may change, although they typically start at 1:30 and end around 4:30 p.m.

Renewable Advisory Council meetings are typically held the same day in the morning.

Agendas are sent 1 week in advance of each meeting and indicate the actual start and end times. Meeting materials (agendas, presentations, notes) are available online. https://www.energytrust.org/about/public-meetings/conservation-advisory-council-meetings/.

All meetings held at Energy Trust offices, 421 SW Oak St, Suite 300, Portland, with a call-in option.

2020 Diversity Advisory Council Meeting Dates

November 2019

January	Tuesday, 1/28, 9:00 a.m.
February	Tuesday, 2/18, 9:00 a.m.
March	Tuesday, 3/10, 9:00 a.m.
April	Wednesday, 4/22, 1:30 p.m.; joint with CAC and RAC
May	No meeting
June	No meeting
July	Tuesday, 7/28, 9:00 a.m.
August	No meeting
September	Tuesday, 9/15, regional meeting, time and location to be determined
October	Wednesday, 10/14, time to be announced; draft budget workshop
November	Tuesday, 11/17, 9:00 a.m.
December	No meeting

Meeting start times may change, although they typically start at 9:00 a.m. and end around 11:30 a.m.

Agendas are sent 1 week in advance of each meeting and indicate the actual start and end times. Meeting materials (agendas, presentations, notes) are available online https://www.energytrust.org/about/public-meetings/diversity-advisory-council-meetings/

All meetings held at Energy Trust offices, 421 SW Oak St, Suite 300, Portland, with a call-in option.

Energy Trust Strategic Plan 2020-2024

November 20, 2019

Energy Trust of Oregon

Our Vision:
Clean affordable energy for everyone

Our Purpose:

Help customers and communities
reduce costs and realize additional benefits
by saving energy and
using renewable resources

2020-2024 Strategic Plan Focus Areas

1. **Engage customers with relevant programs, information and services, especially underserved customers**
2. **Strengthen the value we deliver by linking energy efficiency and renewable energy to the approaches utilities are using to respond to customer energy needs**
3. **Provide objective information and analyses to support development and implementation of energy policies**
4. **Maximize the effectiveness and reach of public purpose charge funding by leveraging additional funding to advance clean energy investments that deliver multiple benefits**
5. **Enhance our ability to quickly and effectively respond to changes, needs and new opportunities**

Next Steps

- ***Following approval*:**
  - Celebration and Communications
  - Dashboard of Performance Indicator Metrics Developed
- ***Early 2020*:**
  - Strategic Planning Committee Reviews Metrics and Dashboard
- ***Spring 2020*:**
  - Revised Metrics and Dashboard presented to Strategic Planning Committee
- ***May 2020*:**
  - Metrics and Final Dashboard presented at board meeting

Thank You

Debbie Menashe

Director of Legal and Human Resources

EnergyTrust of Oregon

Greater Than 1 aMW Analysis Project

Pacific Power 2018 Report

Energy Trust of Oregon
08.20.2019

PROJECT OVERVIEW

The purpose of this project is to determine the percentage of SB 1149 funds that Energy Trust spent on Pacific Power sites that used more than 1 aMW (>1aMW) in 2018. This percentage was compared to Energy Trust's historical spending percentages from 2004-2007 to determine if spending on this group of customers has changed since the inception of SB 838.

PROJECT RESULTS

Key Findings

- Overall 1149 revenue decreased by about $637,000 from 2017 while >1 aMW incentives increased by about $625,000.
  - The increase in spending was mostly due to the increase of incentives for Production Efficiency programs from the previous year
- Total kWh savings for Pacific Power only decreased by 11% while savings at >1 aMW sites increased by 37% from the 2017
- The cumulative post-838 share of 1149 revenue spent on incentives at >1aMW sites remains consistent around 20% for the past five years, making 2018 still below the pre-838 baseline of 27%

In 2018, total spending on >1aMW users was 18% of SB 1149 revenue, an increase of 3 percentage points from 2017. The percentage of total savings from >1aMW customers decreased by 5 percentage points in 2018. Average savings per >1aMW customer site increased by almost 60%, from around 269,000 kWh per site to 425,415 kWh per site. The total incentives per site also increased by almost 37%, from about $52,000 to over $71,000 in 2018.

Table 1: Comparison of analysis and results 2015 -2018

PAC >1aMW Percentages	2016	2017	2018	Change in Overall Percentage
% 1149 revenue to >1aMW customers	22.7%	15.1%	18.0%	2.9%
Average % 1149 revenue to >1aMW customers since 2008*	20.1%	19.5%	19.7%	0.2%
% Total kWh savings from >1aMW customers	13.0%	8.8%	14.0%	5.2%

*Historical baseline average is 27%

Tables 2 & 3 below show SB 1149 revenue, incentives spent on >1aMW customers, the percentage of total SB 1149 revenue spent on the >1aMW sites, total kWh savings from projects at >1aMW sites, and the number of sites receiving incentives for 2004-2007 and 2009-2018.

Table 2: Summary of spending and kWh savings for >1aMW customers 2004-2007 (pre-838)

Pre-838 Results					
Pacific Power	2004	2005	2006	2007	2004-2007 (average)
Energy Efficiency 1149 Revenue	$13,346,771	$13,584,551	$14,614,927	$15,514,799	**$14,265,262**
Incentives to >1aMW Sites	$8,109,843	$3,401,328	$2,194,056	$1,867,641	**$3,893,217**
>1aMW Incentives as a Percent of 1149 Revenue	61%	25%	15%	12%	**27%**
Number of >1aMW Sites Receiving Incentives	38	42	27	34	**35**
Savings from >1aMW Sites (kWh)	64,086,521	36,711,900	14,947,636	27,311,042	**35,764,275**
Total Savings (kwh)	135,919,794	104,841,801	101,439,945	113,245,845	**113,861,846**
Percent of Total Savings from >1aMW Sites	47%	35%	15%	24%	**31%**

Table 3: Summary of spending and kWh savings for >1aMW customers 2009-2018 (post-838)

Pacific Power	2010	2011	2012	2013	2014	2015	2016	2017	2018	2008-2018(average)
Energy Efficiency 1149 Revenue	$16,254,154	$18,772,015	$19,637,424	$20,069,559	$21,298,942	$21,164,176	$21,541,576	$22,701,600	$22,064,810	**$215,963,713**
Incentives to >1aMW Sites	$5,595,740	$4,223,682	$3,993,951	$2,953,604	$4,618,310	$3,168,073	$4,892,441	$3,431,040	$4,056,047	**$41,895,113**
>1aMW Sites Incentives as a Percent of 1149 Revenue	34%	23%	20%	15%	22%	15%	23%	15%	18%	**19%**
Cumulative Average	22%	22%	22%	20%	21%	20%	20%	20%	20%	**20%**
Number of >1aMW Sites Receiving Incentives	54	51	50	53	48	49	43	66	57	**51**
Savings from >1aMW Sites (kWh)	73,365,871	43,075,265	60,102,118	68,146,982	49,011,387	37,592,519	27,779,471	17,746,357	24,248,691	**40,966,245**
Total Savings (kwh)	175,567,589	163,873,693	180,707,979	194,374,912	186,775,439	191,556,490	213,302,647	201,578,561	178,762,991	**171,321,767**
Percent of Total Savings from 838-Exempt Sites	42%	26%	33%	35%	26%	20%	13%	9%	14%	**24%**

*Due to space, 2008 and 2009 figures are not shown

Chart 1 shows the annual cumulative average of 1149 spending from 2004-2007 and 2008-2018. The horizontal dashed line indicates total cumulative average from 2004-2007, which is the historical baseline and threshold for spending in the post-SB 838 period. While annual 1149 spending on >1aMW customers has fluctuated since 2008, the cumulative average has shifted only slightly from 22% to 20% from 2010 to 2018. The cumulative average of the post-838 period has not exceeded the 27% threshold and is not likely to reach that level without a considerable increase in >1aMW spending relative to recent trends. If current revenue levels remained consistent, it would require an increase of over 100 percent from the current annual >1aMW incentive spending average for over seven years for the cumulative average to reach the 27% threshold.

Chart 1: Cumulative average of SB 1149 revenue spending on >1aMW customer incentives 2004-2016, pre & post-838

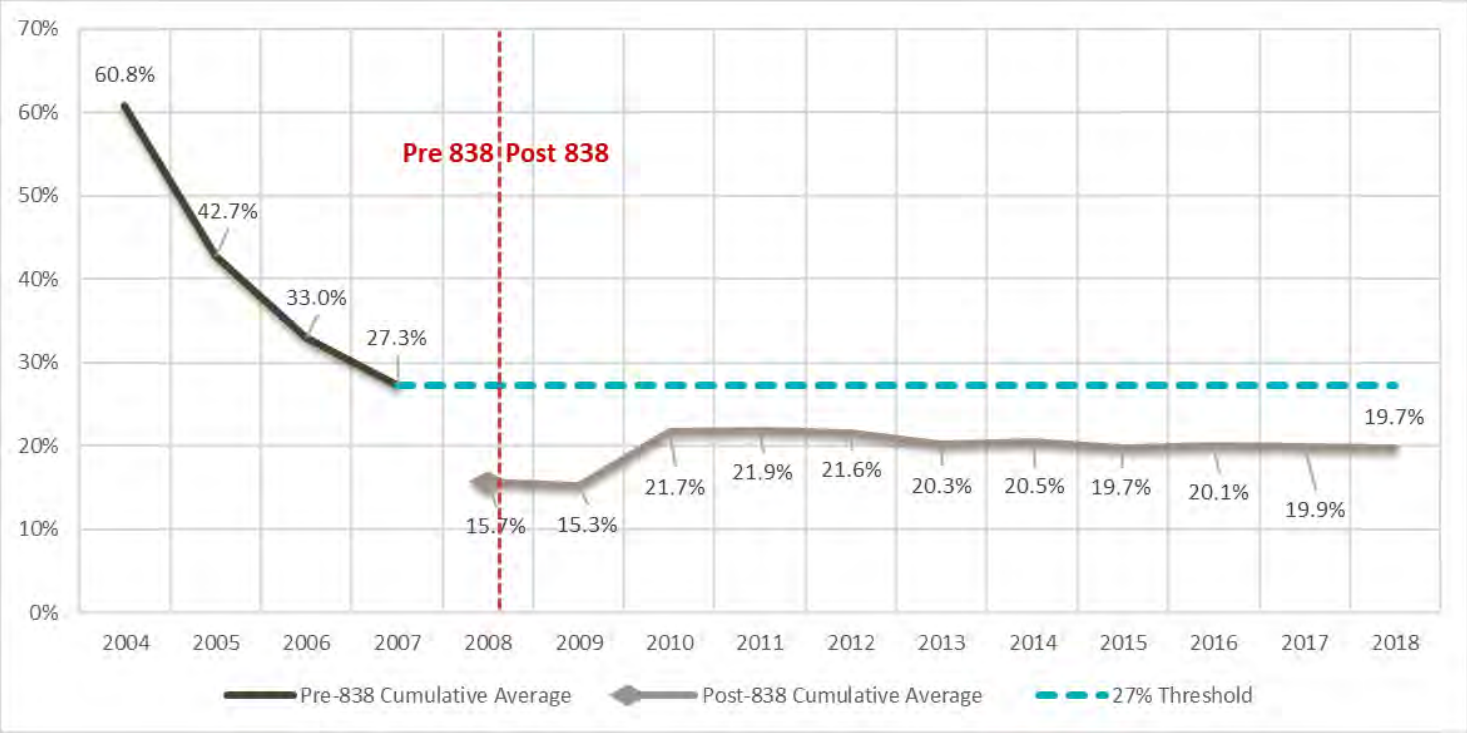


Table 4 below shows Pacific Power spending on >1aMW customers by program by year beginning in 2004. Programs include Production Efficiency, Existing Buildings, and New Building Efficiency projects.

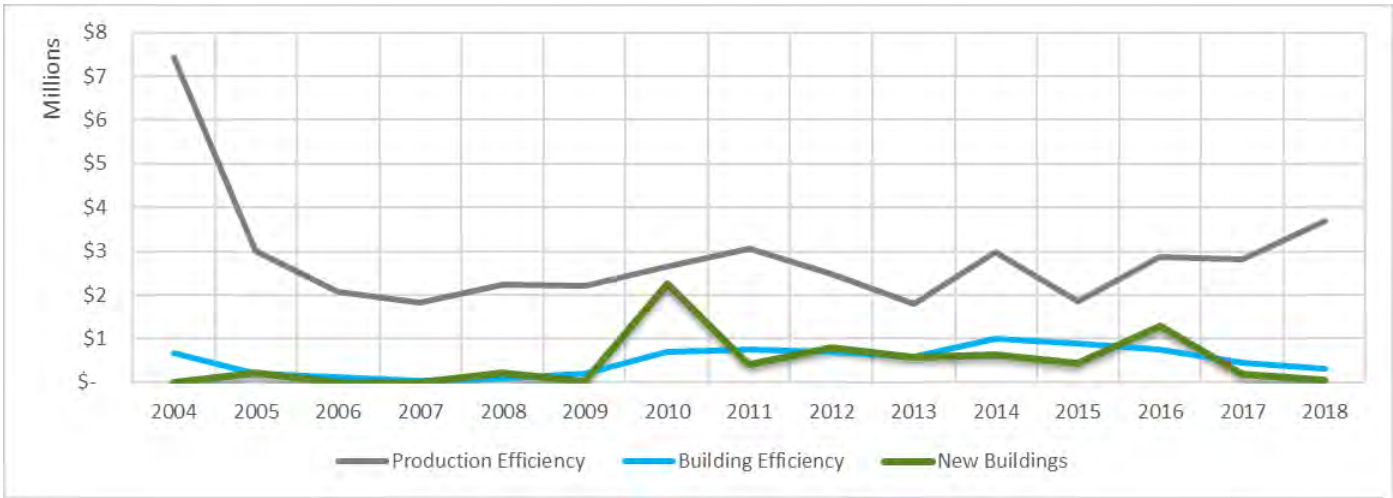
Table 4: Summary of incentive spending & savings by program by year on >1aMW customers 2004-2018 pre & post-838

PAC	Industrial		Existing Building Retrofit		New Building		Total	
	$	kWh	$	kWh	$	kWh	$	kWh
Pre-838 Results								
2004	$7,437,150	59,431,460	$672,694	4,655,061	$0	0	$8,109,843	64,086,521
2005	$3,001,897	32,462,637	$191,317	1,471,116	$208,114	2,778,147	$3,401,328	36,711,900
2006	$2,064,894	12,915,875	$129,162	1,954,899	$0	76,862	$2,194,056	14,947,636
2007	$1,829,793	26,303,769	$37,848	1,007,273	$0	0	$1,867,641	27,311,042
Post-838 Results								
2008	$2,228,208	26,993,981	$81,581	558,736	$217,375	1,391,894	$2,527,165	28,944,611
2009	$2,205,999	19,304,368	$196,508	1,172,455	$32,553	138,596	$2,435,060	20,615,419
2010	$2,637,471	43,403,777	$701,914	3,988,196	$2,256,356	25,973,898	$5,595,740	73,365,871
2011	$3,068,225	36,323,836	$739,033	4,439,079	$416,424	2,312,350	$4,223,682	43,075,265
2012	$2,484,773	33,870,298	$704,960	2,905,115	$804,219	23,326,705	$3,993,951	60,102,118
2013	$1,803,408	21,747,738	$578,404	2,628,407	$571,188	43,770,837	$2,952,999	68,146,982
2014	$2,974,893	33,411,070	$1,009,363	10,392,722	$634,054	5,207,595	$4,618,310	49,011,387
2015	$1,839,594	22,287,566	$889,313	3,725,733	$439,167	11,579,220	$3,168,073	37,592,519
2016	$2,870,429	17,865,468	$748,341	3,232,974	$1,273,671	6,681,029	$4,892,441	27,779,471
2017	$2,809,164	15,188,554	$436,588	1,673,437	$185,288	884,366	$3,431,040	17,746,357
2018	$3,684,166	21,900,153	$324,615	2,158,342	$47,267	190,196	$4,056,048	24,248,691

Chart 2 below shows spending by program by year in graphical form. Each program category demonstrates unique year to year incentive spending patterns.

- Production Efficiency program spending in 2018 increased 31% from 2017 levels
- New Buildings program spending decreased by 74% from 2017
- Existing Buildings program spending has been experiencing a decline in spending since 2015

Chart 2: Pacific Power >1aMW incentives by program 2004-2018, pre & post-838



METHODOLOGY

The Utility Customer Information (UCI) agreement allows utilities to share information with Energy Trust. UCI contains data on sites which consume over 1 aMW and are therefore exempt from paying 838 funds. The source data is housed in the 'Over1aMW' table of the UCI database. To associate this information with Energy Trust site data, Energy Trust appends CRM sites with an "Exempt from 838 charges" label. Because UCI only provides customer name and site address, marking exempt sites in CRM is a manual process. Many exempt sites are related to other sites as a campus or building with multiple units, in which case every unique site is marked with the exempt marker in CRM. This ensures higher accuracy when reporting on customers who are exempt from 838.

Every year, sites can become exempt from 838 rate schedule, or fall off the rate schedule, depending on the previous year's usage. Energy Trust consults UCI and updates CRM sites annually, prior to generating the data for the 838 customer analysis. "To" and "From" dates are used in the CRM site status to indicate when sites are added to or removed from the exempt list for the year. Below are some scenarios where updating is required.

A site receives an exempt from 883 status when:

- A customer's annual electric consumption exceeds 1 aMW (often the utility customer is unaware of this change)
- An expansion with a new meter is added to an existing exempt from 838 customer, thus possibly creating a new CRM site
- New sites are added to existing campuses or site hierarchies in CRM during project-related data entry

A site's 838 status is deactivated when:

- The customer's annual electric consumption falls below 1 aMW

There were several challenges to using addresses as the primary identifying characteristic of an exempt site. The following scenarios highlight these challenges:

- Some sites include multiple addresses
- Campuses or buildings may have multiple associated sites
- The address of an existing meter may change, leading to duplicate sites in CRM
- Some addresses have multiple customer names (typically, multiple divisions or business lines at one address)
- Multiple addresses exist for the same physical location (ie, one data set uses an address on a particular street, and the other uses an address on the cross street or a parallel street)
- Discrepancies in spelling or entry of addresses between data sets
- Generic locations are listed on the PGE >1aMW customer list instead of addresses; for example, "Warehouse" instead of "123 Main Street"
- For large industrial sites, the >1aMW customer list may contain an address for an adjacent office building, and may not include every building address within the site

ASSUMPTIONS

The crucial element of this analysis is the site definition. The OR SB 1149 definition of a site is: "'Site' means a single contiguous area of land containing buildings or other structures that are separated by not more than 1,000 feet, or buildings and related structures that are interconnected by facilities owned by a single retail electricity consumer and that are served through a single electric meter." Energy Trust often must infer which buildings in the campus are included in the exempt from 838 rate structure and which buildings are excluded.

Energy Trust does not attempt to calculate annual electric consumption data to determine if a customer consumes over 1 aMW. Instead, Energy Trust QC's the data received from utilities, requesting clarification when necessary. Aggregating collections of meters and summing their annual usage generates the best data available to Energy Trust,but may not always precisely indicate whether or not a site is exempt from 838 charges.

Greater Than 1 aMW Analysis Project

Portland General Electric (PGE) 2018 Report

Energy Trust of Oregon
09.26.2019

PROJECT OVERVIEW

The purpose of this project is to determine the percentage of SB 1149 funds that Energy Trust spent on sites that used more than 1 aMW (>1aMW) in 2018. This percentage was compared to Energy Trust's historical spending percentages from 2005-2007 to determine if spending on this group of customers has changed since the inception of SB 838.

PROJECT RESULTS

Key Findings

- Overall 1149 revenue increased by $8,908 from the last year, and >1aMW incentives spends increased by over $251,583 from 2017.
- Total kWh savings in PGE territory fell by11% as compared to the previous year, reaching 315 million kWh saved in 2018.
- The cumulative post-838 share of 1149 revenue spent on incentives at >1aMW sites saw a slight increase from 18.8% to 19.0%, meaning the cumulative average remains over the pre-838 baseline of 18.4%, but still below the new provisional threshold of 20%

In 2018, total incentive spending on >1aMW users was 20.5% of SB 1149 revenue, an increase of 0.8% from the previous year. Average spending per site was $76,628, compared to last year at $73,484, while average savings decreased by a larger amount.

Table 1 compares the previous years by showing the average percentage of SB 1149 revenue spending on >1aMW customers since 2008, and the percentage of total savings from >1aMW customers

Table 1: Comparison of analysis and results 2016 -2018

PGE >1aMW Customer Activity	2016	2017	2018	Percent Change
% 1149 revenue to >1aMW customers	22.8%	19.7%	20.5%	0.8%
Cumulative average % 1149 revenue to >1aMW customers since 2008	18.7%	18.8%	19.0%	0.2%
% Total kWh savings from >1aMW customers	14.8%	21.3%	17.2%	-4.2%

*Historical baseline average is 18.4% but was changed in 2018 to 20%

Tables 2 & 3 below show SB 1149 revenue, incentives spent on >1aMW customers, the percentage of total SB 1149 revenue spent on the >1aMW sites, total kWh savings from projects at >1aMW sites, and the number of sites receiving incentives for 2005-2007 and 2008-2018.

Table 2: Summary of spending and kWh savings for >1aMW PGE customers 2005-2007 (pre-838)

Pre-838 Results				
Energy Efficiency 1149 Revenue	2005	2006	2007	2005-2007 (average)
Energy Efficiency 1149 Revenue	$21,065,813	$22,720,384	$25,673,961	**$23,153,386**
Incentives to >1aMW Sites	$9,742,145	$1,282,158	$1,762,765	**$4,262,356**
>1aMW Incentives as a Percent of 1149 Revenue	46%	6%	7%	**18.4%**
Number of >1aMW Sites Receiving Incentives	39	30	27	**32**
Savings from >1aMW Sites (kWh)	126,503,077	14,056,604	68,431,766	**69,663,816**
Total Savings (kwh)	213,903,461	121,192,910	139,322,053	**158,139,475**
Percent of Total Savings from >1aMW Sites	59%	12%	49%	**44%**

Table 3: Summary of spending and kWh savings for >1aMW PGE customers 2008-2018 (post-838)

Post-838 Results										
PGE	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**	**2016**	**2017**	**2018**	**2008-2018 (average)**
Energy Efficiency 1149 Revenue	$27,065,764	$28,510,770	$28,119,658	$26,484,405	$28,741,721	$28,723,137	$28,127,435	$29,843,360	$29,852,268	**$309,028,975**
Incentives to >1aMW Sites	$4,189,900	$5,950,881	$7,508,724	$6,705,824	$5,621,248	$5,004,680	$6,413,577	$5,878,681	$6,130,264	**$58,604,337**
>1aMW Sites Incentives as a Percent of 1149 Revenue	15%	21%	27%	25%	20%	17%	23%	20%	21%	**19.0%**
Cumulative Average	12%	14%	17%	18.1%	18.3%	18.2%	18.7%	18.8%	19.0%	**19.0%**
Number of >1aMW Sites Receiving Incentives	49	54	56	56	55	57	62	80	80	**56**
Savings from >1aMW Sites (kWh)	49,949,458	46,516,463	62,520,010	95,229,586	73,813,874	40,267,774	48,926,554	75,477,544	54,128,864	**54,007,267**

*Due to space, 2008 and 2009 figures are not shown

Chart 1 shows the cumulative average of 1149 spending from 2005-2007 and 2008-2018. There are two horizontal lines, the yellow indicates the cumulative average from 2005-2007, which is the historical baseline, but no longer the threshold for spending in the post-SB 838 period. The new threshold, the blue horizontal line, is the new agreed upon threshold of 20%. Annual 1149 spending on >1aMW sites and the cumulative average increased from 2008 through 2012, but decreased slightly in 2013 and 2014. The cumulative average of the post-838 period (19.0%) is below the 20% line.

Chart 1: Cumulative average of SB 1149 revenue spending on >1aMW PGE customer incentives 2004-2018, pre & post-838

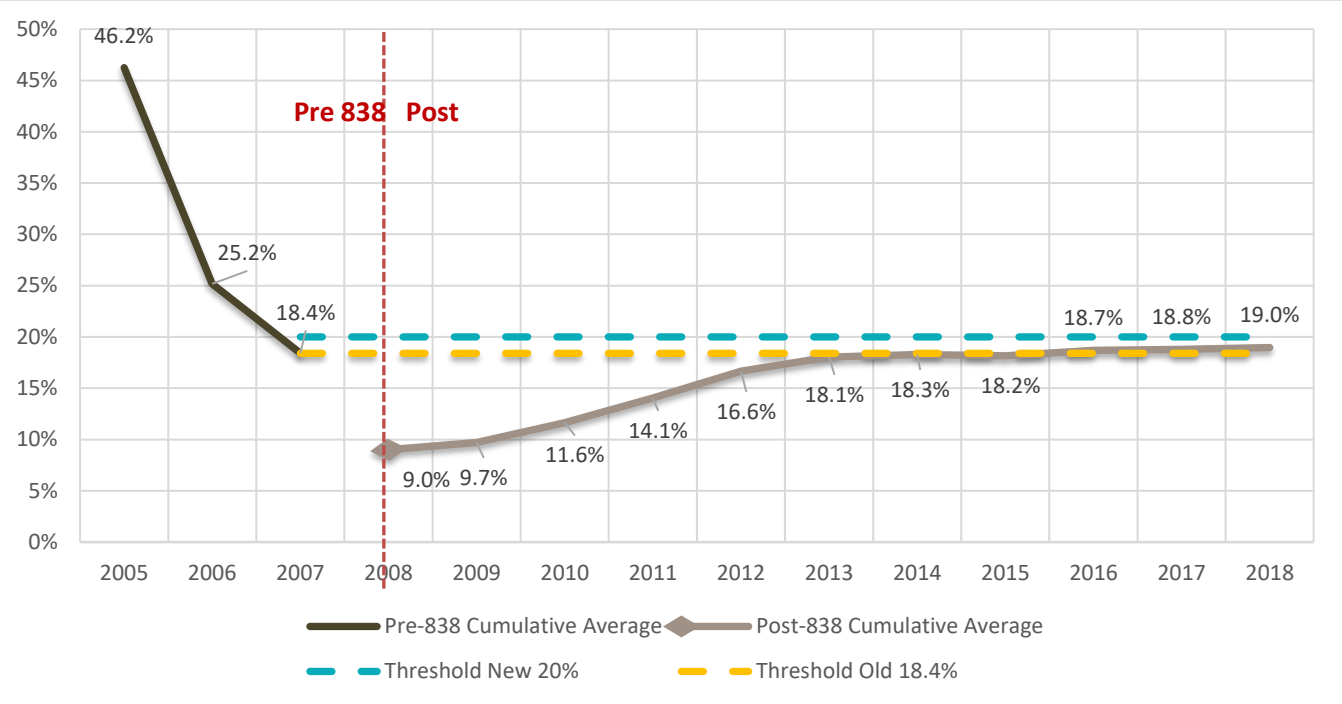


Table 4 below shows PGE spending on >1aMW customers by program by year beginning in 2005. Programs include Production Efficiency (PE), Existing Buildings (BE), and New Building Efficiency (NBE) projects.

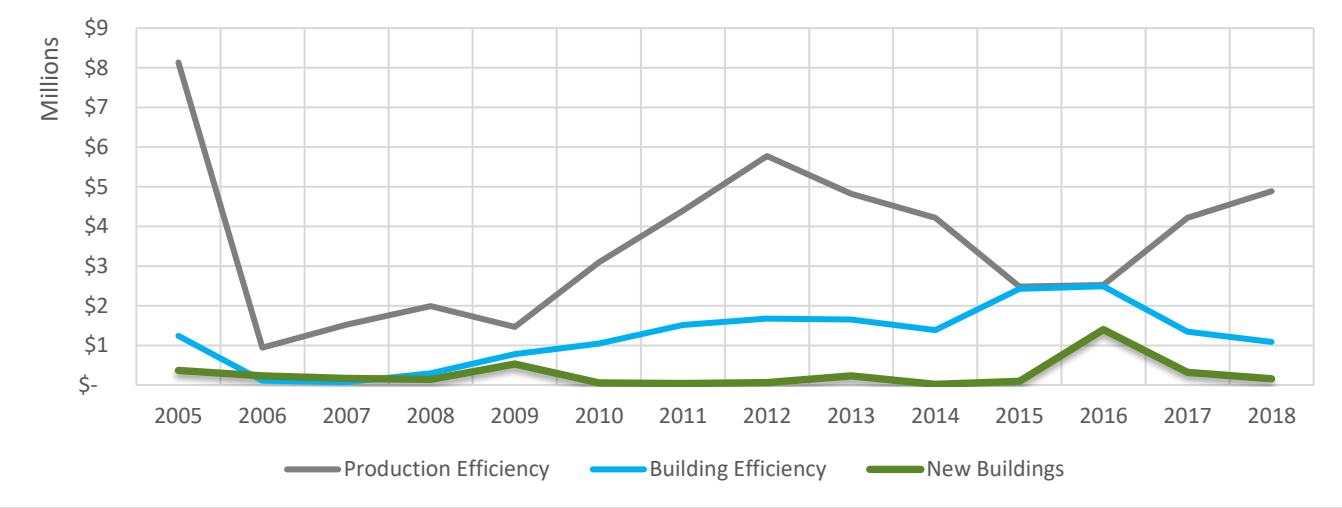
Table 4: Summary of incentive spending & savings by program by year on >1aMW PGE customers 2005-2018, pre & post-838

PGE	Production Efficiency		Existing Building Retrofit		New Building		Total	
	$	kWh	$	kWh	$	kWh	$	kWh
Pre-838 Results								
2005	$8,134,413	N/A	$1,236,725	N/A	$371,008	N/A	$9,742,145	N/A
2006	$942,023	N/A	$111,121	N/A	$229,014	N/A	$1,282,158	N/A
2007	$1,520,782	N/A	$73,324	N/A	$168,659	N/A	$1,762,765	N/A
Post-838 Results								
2008	$1,989,391	N/A	$294,243	N/A	$138,184	N/A	$2,421,817	N/A
2009	$1,466,194	N/A	$781,466	N/A	$531,081	N/A	$2,778,741	N/A
2010	$3,097,231	43,322,367	$1,042,144	6,495,907	$50,525	131,184	$4,189,900	49,949,458
2011	$4,397,749	39,347,943	$1,513,314	6,703,335	$39,818	465,185	$5,950,881	46,516,463
2012	$5,774,602	51,916,828	$1,673,182	10,428,884	$60,940	174,338	$7,508,724	62,520,010
2013	$4,824,179	81,668,283	$1,654,099	11,204,217	$227,546	2,357,086	$6,705,824	95,229,586
2014	$4,219,172	66,948,131	$1,384,860	6,765,869	$17,216	99,874	$5,621,248	73,813,874
2015	$2,485,462	28,953,430	$2,425,927	11,013,332	$93,291	301,012	$5,004,680	40,267,774
2016	$2,525,003	31,048,159	$2,490,249	10,271,143	$1,398,325	7,607,252	$6,413,577	48,926,554
2017	$4,214,054	66,459,695	$1,343,681	7,788,934	$320,947	1,228,915	$5,878,681	75,477,544
2018	$4,883,656	44,896,817	$1,085,037	8,518,714	$161,571	713,333	$6,130,264	54,128,864

Chart 2 below shows spending by program by year in graphical form. Each program category demonstrates unique year to year incentive spending patterns:

- New Buildings and Existing Building programs spending did not maintain the increased spending from 2016 and continued to fall for the past two years.
- Production Efficiency had two consecutive years where spending was historically low, in 2015-2016. However, savings have increased in the two years following that two year low.

Chart 2: PGE >1aMW incentives by program 2005-2018, pre & post-838



METHODOLOGY

The Utility Customer Information (UCI) agreement allows utilities to share information with Energy Trust. UCI contains data on sites which consume over 1 aMW and are therefore exempt from paying 838 funds. The source data is housed in the 'Over1aMW' table of the UCI database. To associate this information with Energy Trust site data, Energy Trust appends CRM sites with an "Exempt from 838 charges" label. Because UCI only provides customer name and site address, marking exempt sites in CRM is a manual process. Many exempt sites are related to other sites as a campus or building with multiple units, in which case every unique site is marked with the exempt marker in CRM. This ensures higher accuracy when reporting on customers who are exempt from 838.

Every year, sites can become exempt from 838 rate schedule, or fall off the rate schedule, depending on the previous year's usage. Energy Trust consults UCI and updates CRM sites annually, prior to generating the data for the 838 customer analysis. "To" and "From" dates are used in the CRM site status to indicate when sites are added to or removed from the exempt list for the year. Below are some scenarios where updating is required.

A site receives an exempt from 838 status when:

- A customer's annual electric consumption exceeds 1 aMW (often the utility customer is unaware of this change)
- An expansion with a new meter is added to an existing exempt from 838 customer, thus possibly creating a new CRM site
- New sites are added to existing campuses or site hierarchies in CRM during project-related data entry

A site's 838 status is deactivated when:

- The customer's annual electric consumption falls below 1 aMW

There were several challenges to using addresses as the primary identifying characteristic of an exempt site. The following scenarios highlight these challenges:

- Some sites include multiple addresses
- Campuses or buildings may have multiple associated sites
- The address of an existing meter may change, leading to duplicate sites in CRM
- Some addresses have multiple customer names (typically, multiple divisions or business lines at one address)
- Multiple addresses exist for the same physical location (ie, one data set uses an address on a particular street, and the other uses an address on the cross street or a parallel street)
- Discrepancies in spelling or entry of addresses between data sets
- Generic locations are listed on the PGE >1aMW customer list instead of addresses; for example, "Warehouse" instead of "123 Main Street"
- For large industrial sites, the >1aMW customer list may contain an address for an adjacent office building, and may not include every building address within the site

ASSUMPTIONS

The crucial element of this analysis is the site definition. The OR SB 1149 definition of a site is: "'Site' means a single contiguous area of land containing buildings or other structures that are separated by not more than 1,000 feet, or buildings and related structures that are interconnected by facilities owned by a single retail electricity consumer and that are served through a single electric meter." Energy Trust often must infer which buildings in the campus are included in the exempt from 838 rate structure and which buildings are excluded.

Energy Trust does not attempt to calculate annual electric consumption data to determine if a customer consumes over 1 aMW. Instead, Energy Trust QC's the data received from utilities, requesting clarification when necessary. Aggregating collections of meters and summing their annual usage generates the best data available to Energy Trust, but may not always precisely indicate whether or not a site is exempt from 838 charges.

Update on 2020 Annual Budget & 2020-21 Action Plan

November 20, 2019

Energy Trust of Oregon

2020 Annual Goals - Draft

1 Meet savings targets of 45.6 aMW and 6.8 million annual therms, meet the generation target of 3.4 aMW, and create future opportunities

2 Use guidelines to determine resource investments in community efforts

3 Provide information to policymakers, agencies and implementers

4 Strengthen internal innovation capabilities and develop new proposals

5 Make operational improvements

Key Takeaways

1. 2020 organizational goals position us to accomplish new strategic plan
2. Portfolio of cost-effective programs remains a strength
3. As forecasted, electric savings declining and costs increasing; remains least-cost resource for customers
4. Developing insights, program enhancements and data to better reach underserved customers
5. Piloting approaches to deliver more value to utility systems

Workshop Comments Summary

- Shorter action plans appreciated
- Intent of 2020 Annual Goal 2 regarding communities needs clarification
- Desire to see integration of energy efficiency and solar activities more clearly in the budget and action plan
- Concern regarding whether increasing efficiency baselines for measures exclude population segments
- Interest in whether additional energy savings and generation could be accomplished with funding or policy changes
- Interest in how staff development efforts support innovation

Utility Comments Summary

- General support
- Support diversity, equity and inclusion initiative and collaboration to deliver benefits to more customers
- Encouraged coordination, alignment with IRPs, and monitoring levelized costs
- Support for prioritizing innovation in areas of specific interest to each utility
- Funding to community energy initiatives should be tied to acquiring savings and renewable energy

OPUC Comments Highlights

- Decrease transaction costs for high-volume activities through employing new technologies and automation
- Continue to work with OPUC on future staffing costs as savings continue to decline
- Prioritize residential and multifamily programs, focusing on pilot studies and program re-design
- Report on DEI initiative progress and co-funding opportunities
- Incorporate a longer-range forecast into reporting on activities for the Community Solar program
- Complete implementation of new budget tool and measure development automation

Changes Underway to Draft Budget

- Revisions to Goal
- Revenue updated to reflect funding agreements
- Emphases in action plans to adjust as we proceed in response to comments
- Efficiency programs making minor adjustments
- Savings shift -0.45% in electrics and +0.36% in gas
  - +/- 1.2% to 1.9% based on utility territory
  - Updates to market projections for measures and projects
  - First view of gas savings from NEEA added
- Expenditures increase 0.9%, overall
  - +0.37% in electric and +3.22% in gas
  - Correction for unallocated incentives for New Homes
  - Adjustments for projects shifting and forecasts

Goal 2: ~~Use~~ Develop guidelines to ~~determine~~ guide resource investments in community efforts, engaging stakeholders for input.

We will seek input from community partners and advisory councils as we develop a set of guidelines to more clearly identify Energy Trust's role in supporting community energy efforts. These guidelines will have a particular emphasis on:

- Coordinating with utility efforts in communities
- Building capacity in communities and community-based organizations
- Strengthening internal capabilities to support community efforts
- Developing toolkits and templates

Draft to Final Proposed Savings Changes

	2020 Draft Savings	2020 Final Proposed Savings	Total Change	% Change
PGE (aMW)	27.53	27.40	-0.13	-0.47%
Pacific Power (aMW)	18.06	17.98	-0.07	-0.41%
NW Natural Oregon (MMTh)	5.57	5.59	0.02	0.42%
NW Natural Washington (MMTh)	0.34	0.34	0.00	0.14%
Cascade Natural Gas (MMTh)	0.55	0.55	-0.01	-1.17%
Avista (Th)	0.38	0.39	0.01	1.88%
Total Electric Savings (aMW)	**45.59**	**45.38**	**-0.20**	**-0.45%**
Total Gas Savings (MMTh)	**6.84**	**6.87**	**0.02**	**0.36%**

Columns may not total due to rounding

aMW: average megawatts
MMTh: million annual therms

Draft to Final Proposed Expenditures Changes

	2020 Draft Expenses ($ Million)	2020 Final Proposed Expenses ($ Million)	Total Change ($ Million)	% Change
PGE (efficiency)	$89.61	$90.30	$0.69	0.77%
Pacific Power (efficiency)	$61.93	$61.81	-$0.13	-0.20%
NW Natural Oregon	$24.97	$25.83	$0.85	3.41%
NW Natural Washington	$2.58	$2.58	$0.00	0.11%
Cascade Natural Gas	$3.33	$3.36	$0.03	0.79%
Avista	$1.70	$1.87	$0.17	9.90%
Total Electric Efficiency	**$151.54**	**$152.11**	**$0.57**	**0.37%**
Total Gas Efficiency	**$32.59**	**$33.64**	**$1.05**	**3.22%**

Columns may not total due to rounding

Next Steps

Final Proposed Budget will be online December 6

- www.energytrust.org/budget

Board will consider for adoption on December 13

Thank You!

EnergyTrust of Oregon

Diversity Advisory Council Update

November 20, 2019

Energy Trust of Oregon

Diversity Advisory Council Formation

- ✓Assembled internal project team including members of the Energy Trust board
- ✓Recruited Foundational DAC members
- ✓Held five meetings (January – March 2019)
- ✓Foundational DAC arrived at a draft charter
- ✓Board approved charter (July 2019)
- ✓Foundational DAC members that applied were approved as members (Sept. 2019)

Charter Development

Dedicated time to developing a charter with input from experts and those invested in outcome

- ✓Built charter from ground up
- ✓Started meetings with check-ins
- ✓Established ground rules
- ✓Took time to step back, answer questions and provide information
- ✓All members focused on listening and understanding

Membership

Diversity Advisory Council Members:

Foundational DAC members the applied to join DAC

- Kaeti Namba: Native American Youth and Family Center
- Cheryl Roberts: African American Alliance for Homeownership
- Charity Fain: Community Energy Project
- Kheoshi Owens: Empress Rules
- Oswaldo Bernal: OBL Media, LLC

Foundational DAC Members:

- Carolina Iraheta Gonzalez – Verde
- Anthony Veliz – IZO Marketing

Diversity Advisory Council Recruitment

- 5 of 11 member slots are filled
- Of the six openings, four will be filled by members who reside outside of Portland metro area
- Online application on Energy Trust website
- Seeking members who have:
  - Expertise in diversity, equity and inclusion
  - The ability to work collaboratively with people of diverse perspectives and experiences
  - Interest in energy efficiency and renewable energy programs, services and impacts
  - The ability to bring perspective on the geographic and demographic diversity of the region

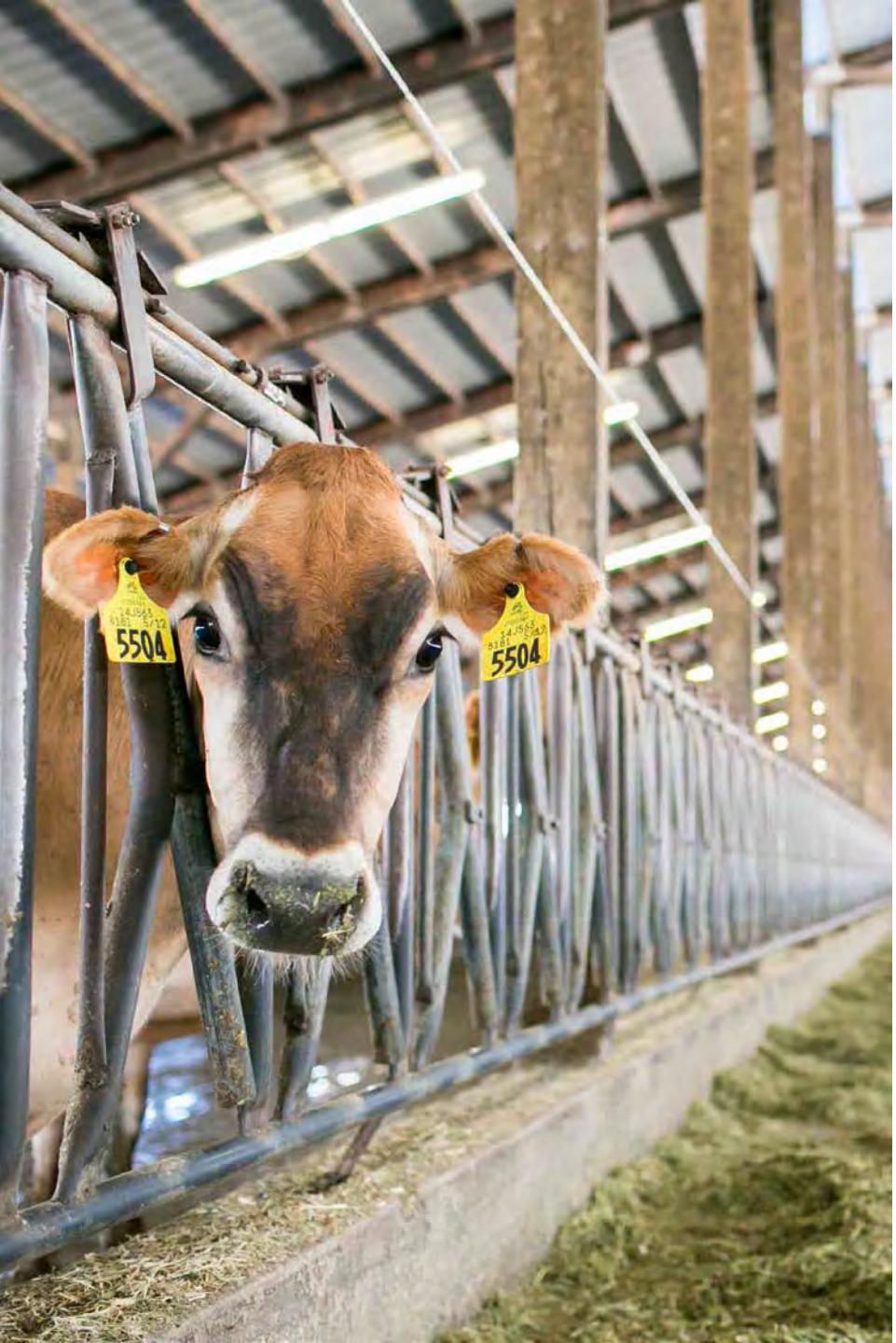
Diversity Advisory Council Charter

The RAC and CAC charters served as reference points for the DAC charter. Key distinctions and elements:

- ✓11 members
- ✓Regional distribution (4 outside Portland metro)
- ✓Stipends
- ✓Application, member review process and skills matrix
- ✓Term limits
- ✓Outside Portland meeting

Activity To Date and Upcoming

- ✓Meetings in September and November
- ✓Attended budget workshop
- ✓Board nomination committee feedback
- ✓Board is expected to consider stipend policy in February
- ✓2020 meeting schedule
  - ✓Meet day prior to CAC and RAC
  - ✓Two joint sessions with CAC and RAC
  - ✓Retreat once all members on board



Thank You

Sue Fletcher

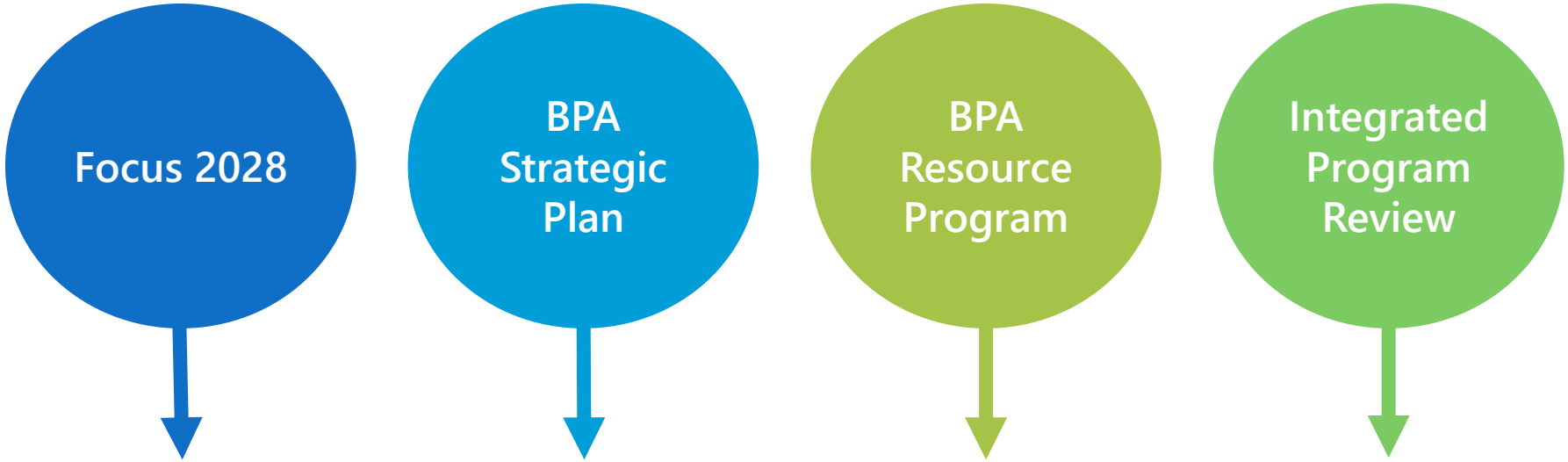
Sr. Manager Communications
and Customer Service

EnergyTrust of Oregon

2020-2021 BPA EE Implementation Plan

January 24, 2019

BACKGROUND



Commitment to review of how BPA determines EE goal

Increase focus on EE that supports BPA's evolving needs

Identified EE as a key component to meeting BPA's power needs

Confirmed 2020-2021 budget and savings goals

IMPLEMENTATION PLAN

This 2020-2021 EE Implementation Plan seeks to better align BPA's Energy Efficiency portfolio with BPA's Resource Program findings starting in the 2020-2021 rate period

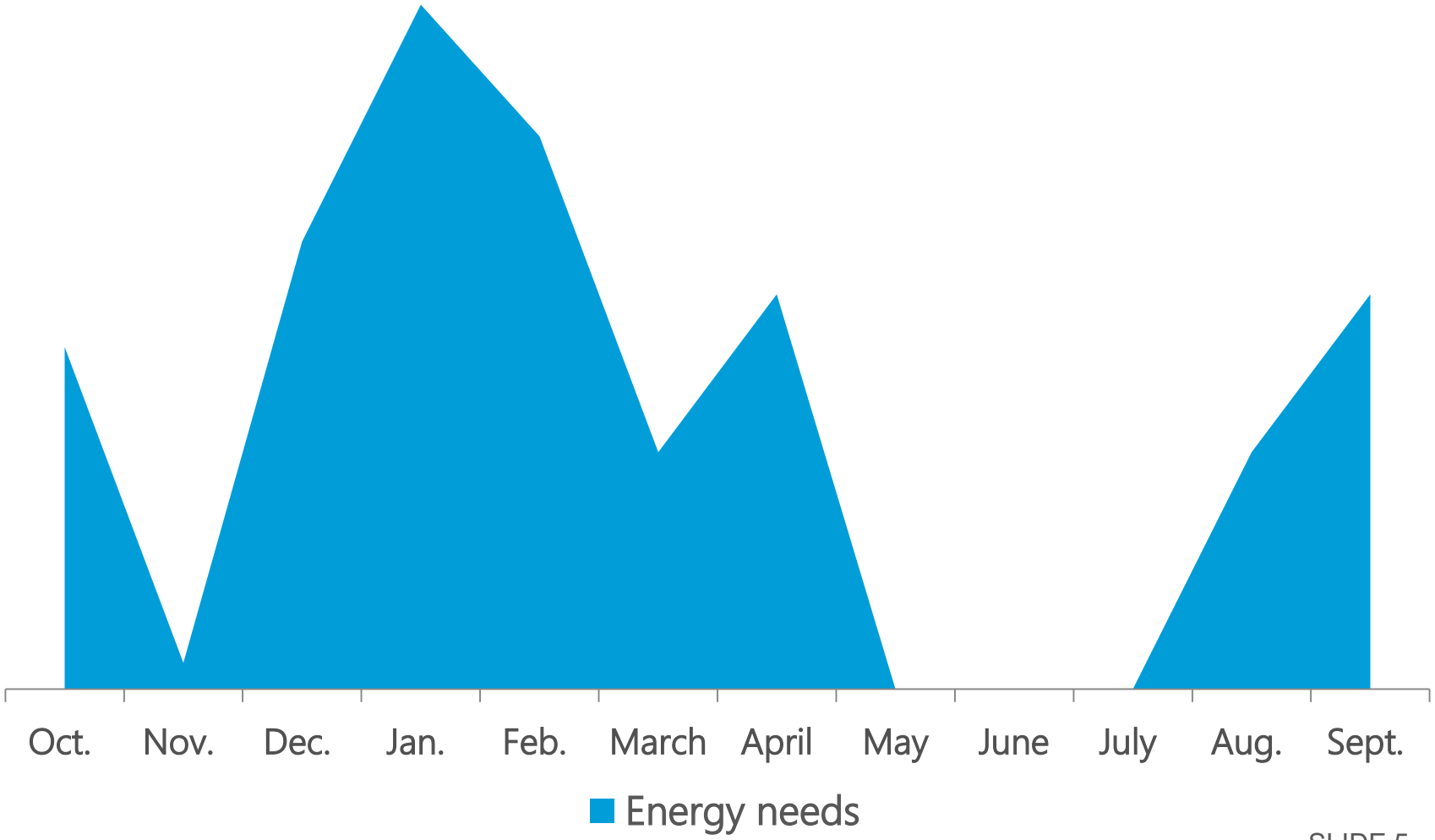
WHAT ARE BPA'S NEEDS FROM EE?

HOW MUCH

EE to acquire to meet our system needs

TYPE

of EE most suited to meet our system needs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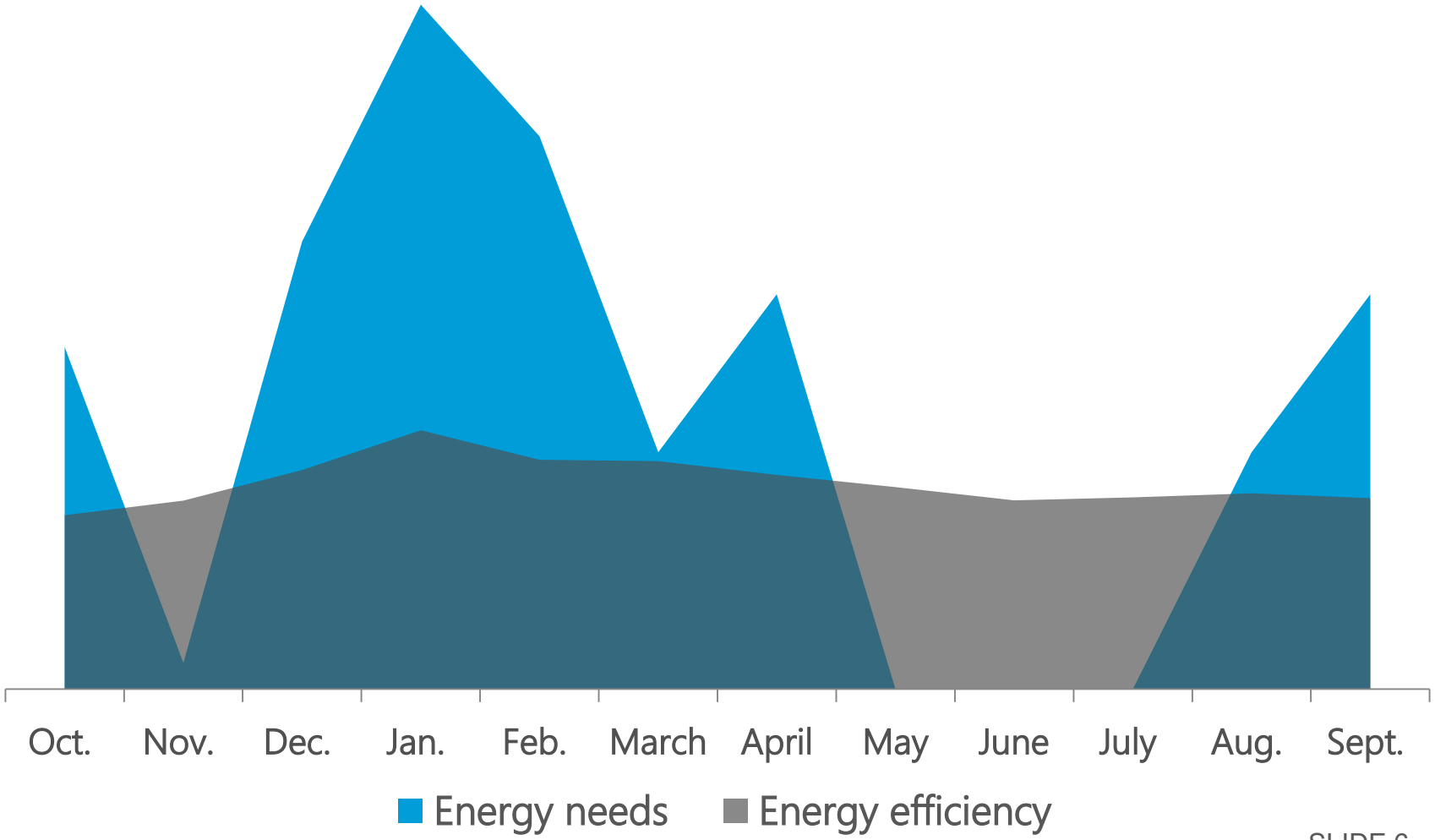
Energy needs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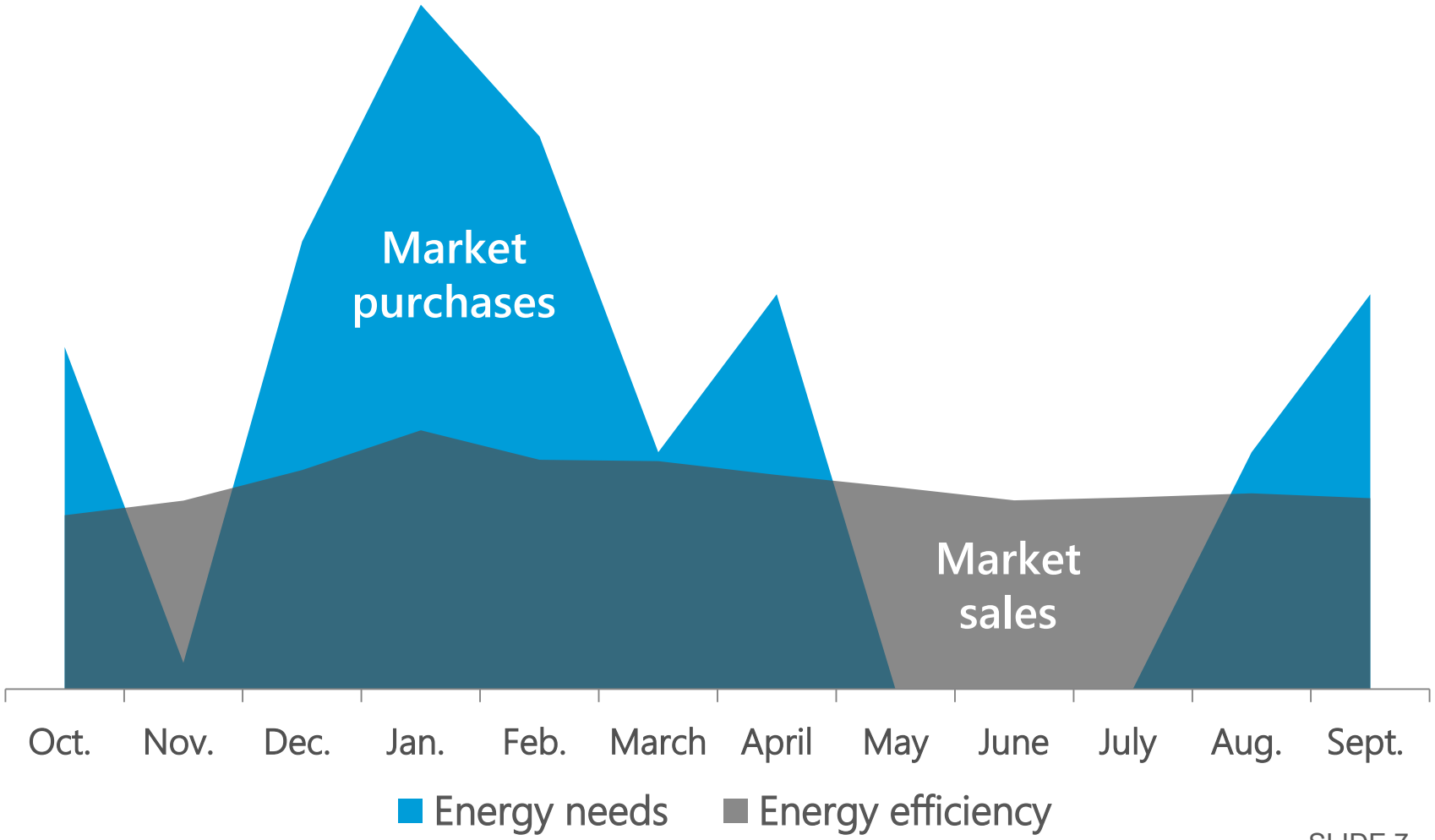
Energy needs
Energy efficiency


Market purchases
Market sales
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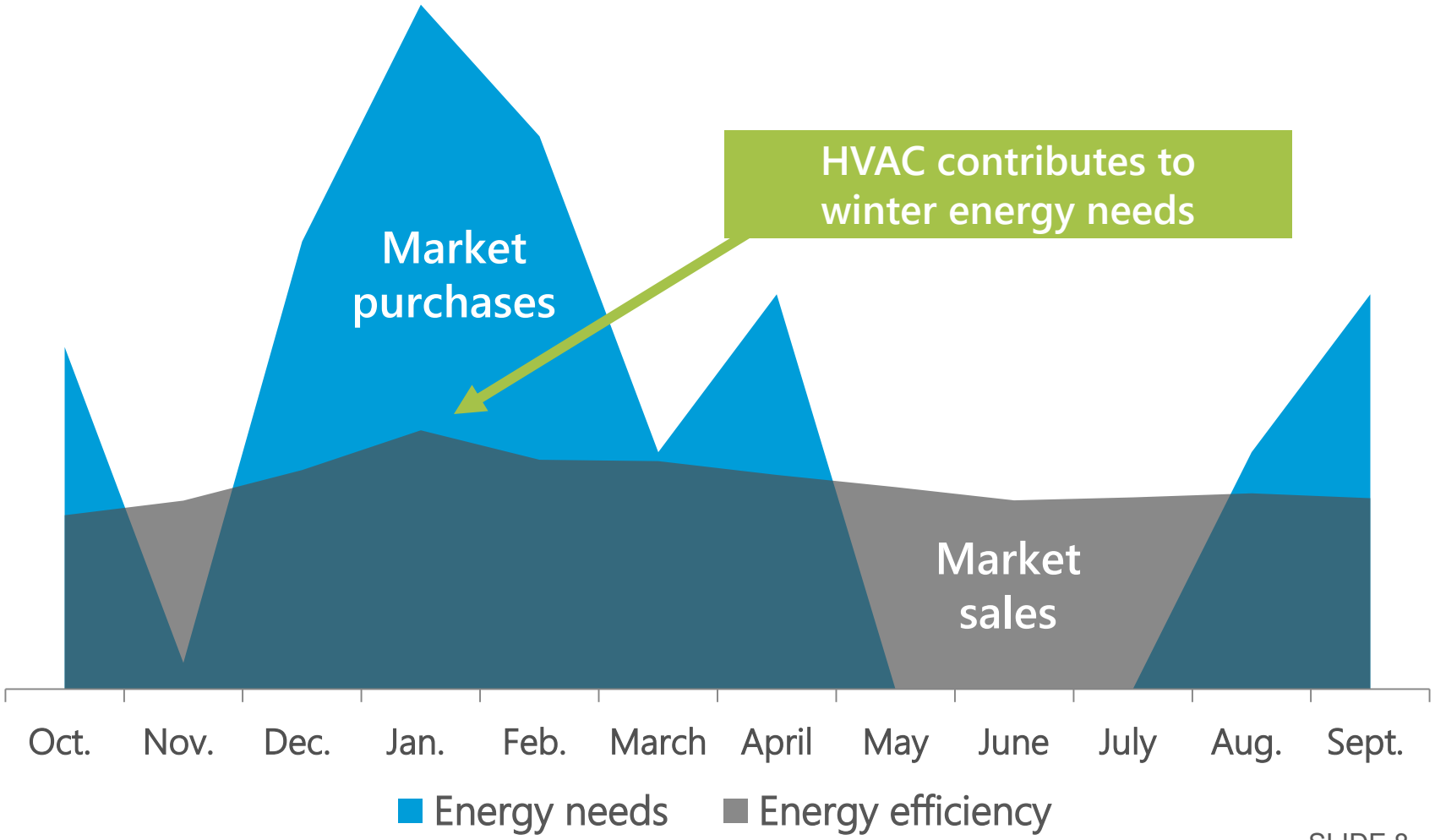
Energy needs
Energy efficiency


HVAC contributes to winter energy needs
Market purchases
Market sales
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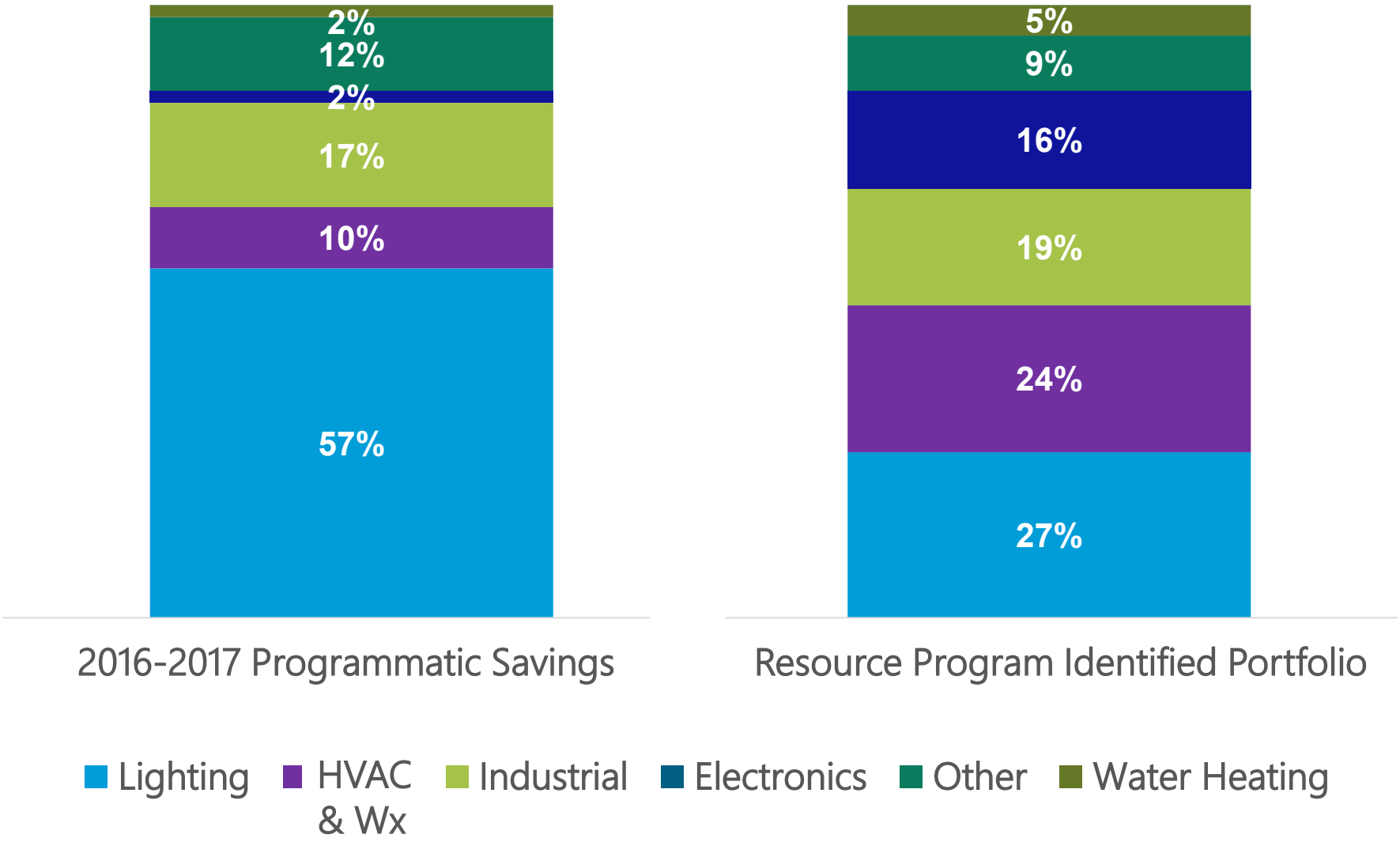
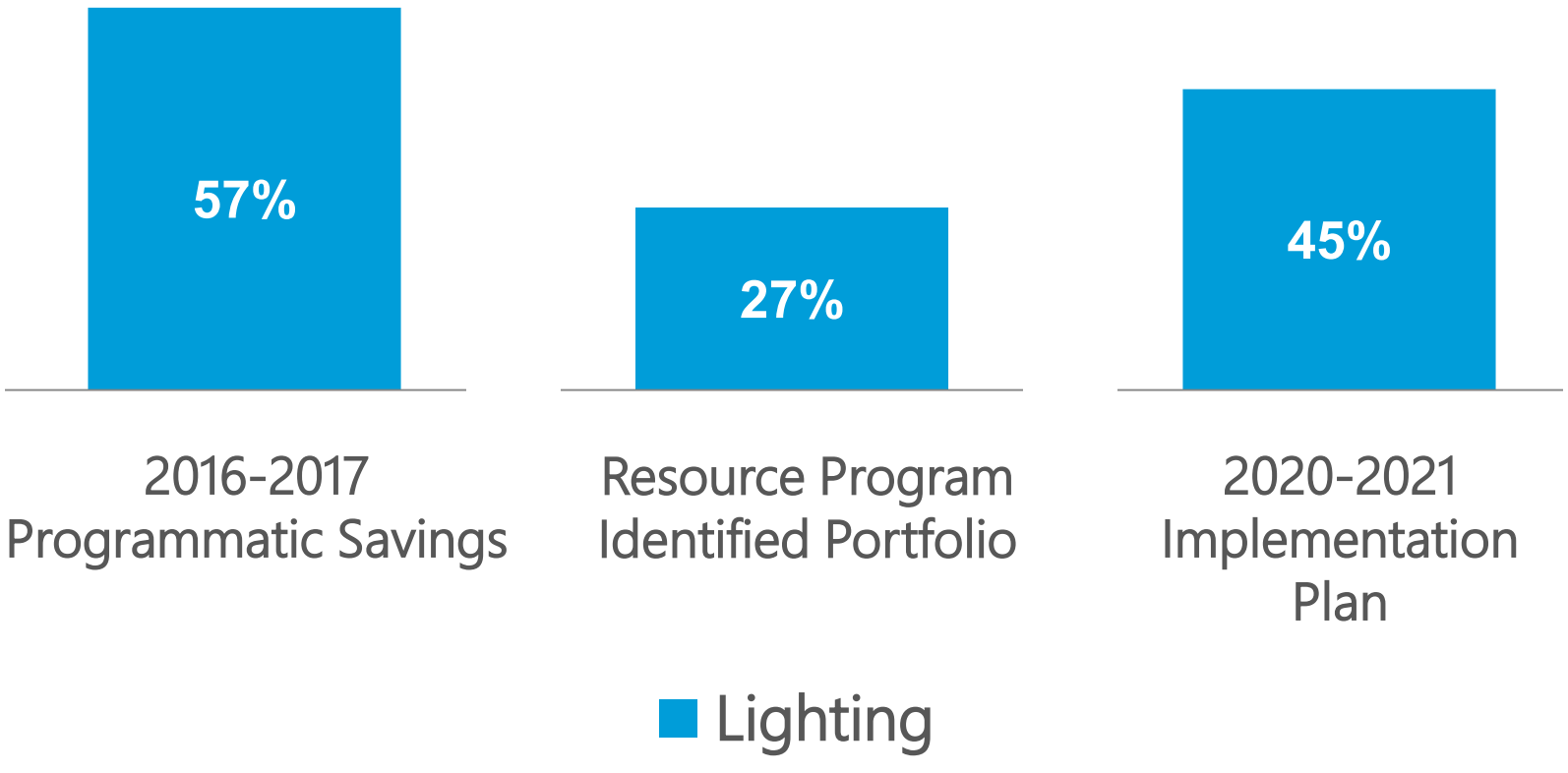
Energy needs
Energy efficiency

BUT…THE TYPE OF EE SELECTED IS DIFFERENT




57%
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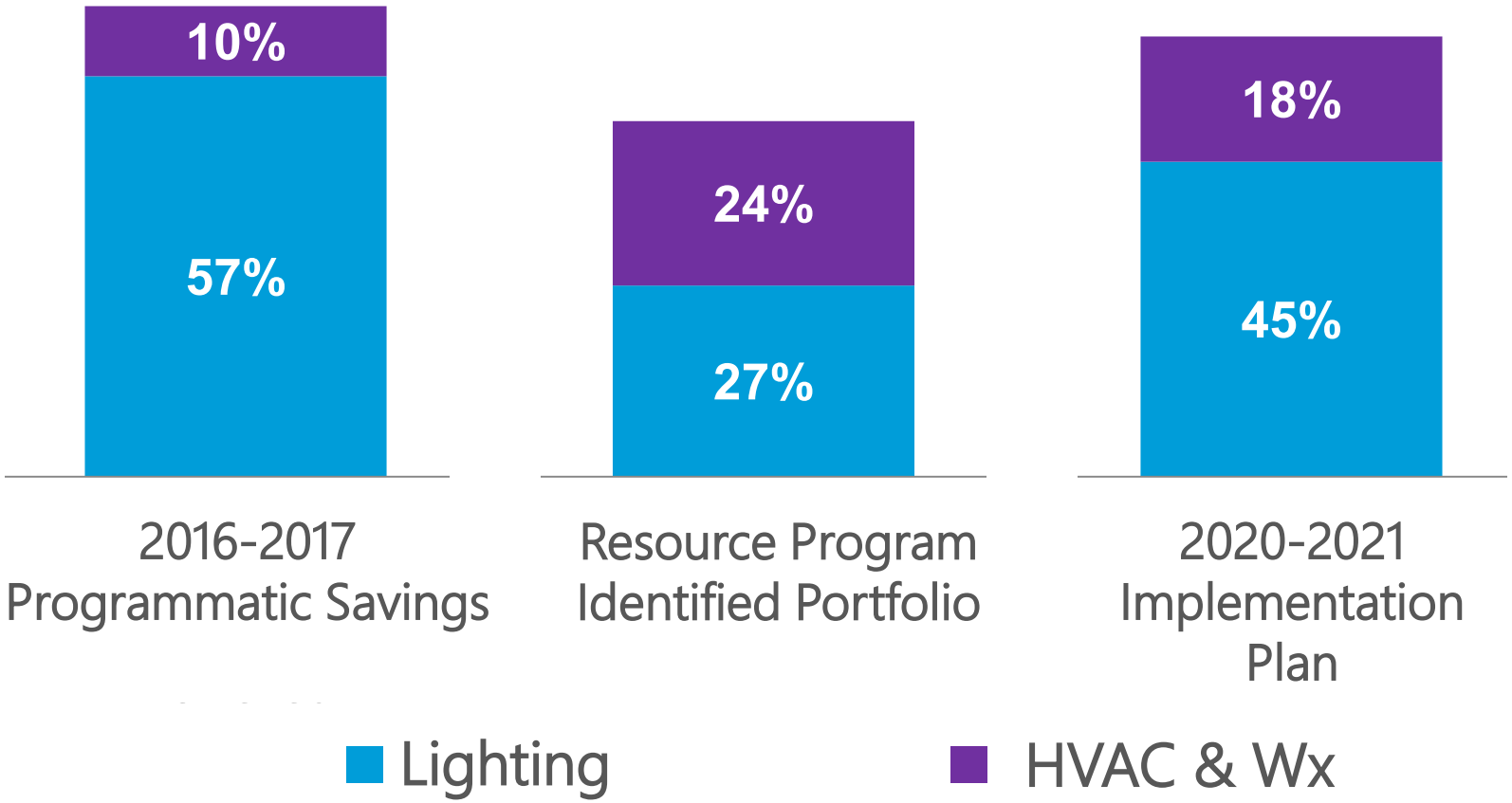
2016-2017 Programmatic Savings
Resource Program Identified Portfolio
2020-2021 Implementation Plan
Lighting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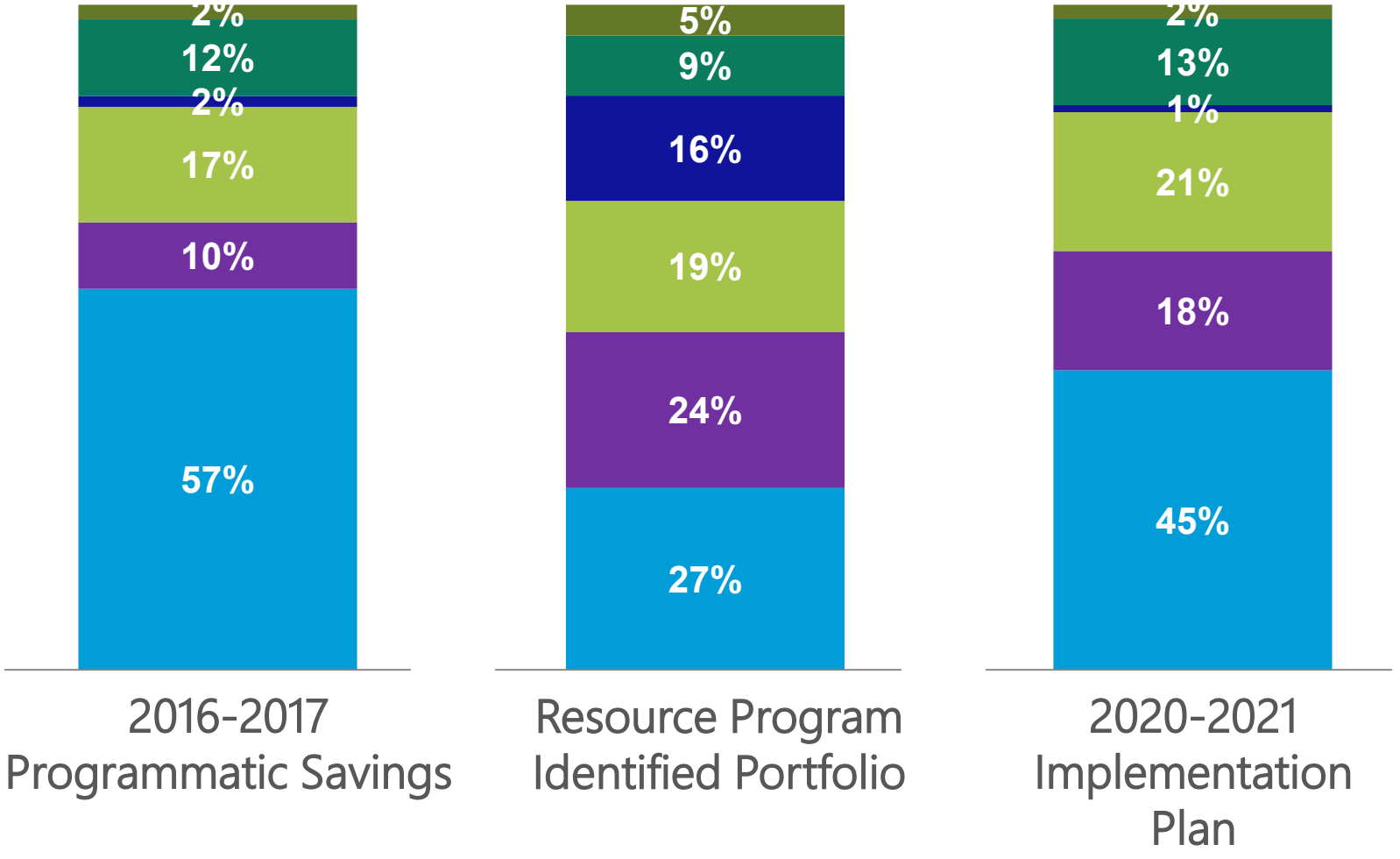
2016-2017 Programmatic Savings
Resource Program Identified Portfolio
2020-2021 Implementation Plan
Lighting
HVAC & Wx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45%
2016-2017 Programmatic Savings
Resource Program Identified Portfolio
2020-2021 Implementation Plan
Lighting
HVAC & Wx
Industrial
Electronics
Other
Water Heating

Questions?

New Buildings Proposed Exception

November 20, 2019

EnergyTrust of Oregon

Code Changes began 2019

2019 Oregon Zero Energy Ready Commercial Code:

- took effect Oct 1, 2019 with mandatory use effective Jan 1, 2020

A 2020 code update to energy provisions is anticipated to take effect Oct 1, 2020, with mandatory use effective Jan 1, 2021

Program Changes

State's code shift: 2 codes in 12 months:

- In 2019: change from 2009 IECC based code to ASHRAE 90.1-2016
- In 2020: change from ASHRAE 90.1-2016 to ASHRAE 90.1-2019

Program will reference State code

- In 2020: ASHRAE 90.1-2016
- In 2021: ASHRAE 90.1-2019

No longer a feasible way to establish precise measure-level energy savings or incremental cost for the TRC test.

Program challenges for custom analysis

"Why is there no longer a feasible way for Energy Trust to establish project level incremental costs as we do now?"

The new code includes a pathway for compliance that is based on total building performance. A static baseline is used that references a 2004 building and a performance index that has no cost basis.

Those two factors make it virtually impossible to distinguish specific building characteristics (or energy savings measures) that lead to code compliance. We cannot get incremental cost comparisons.

Without a feasible way to establish incremental costs we cannot calculate the TRC.

Program savings approach

"What will energy savings estimates be based on?"

Oregon's 2019 code will be referenced for New Buildings custom modeled projects permitted under the new code.

This provides a whole-building methodology to accurately determine energy saved.

"Without a referent cost basis what will incentives be based on?"

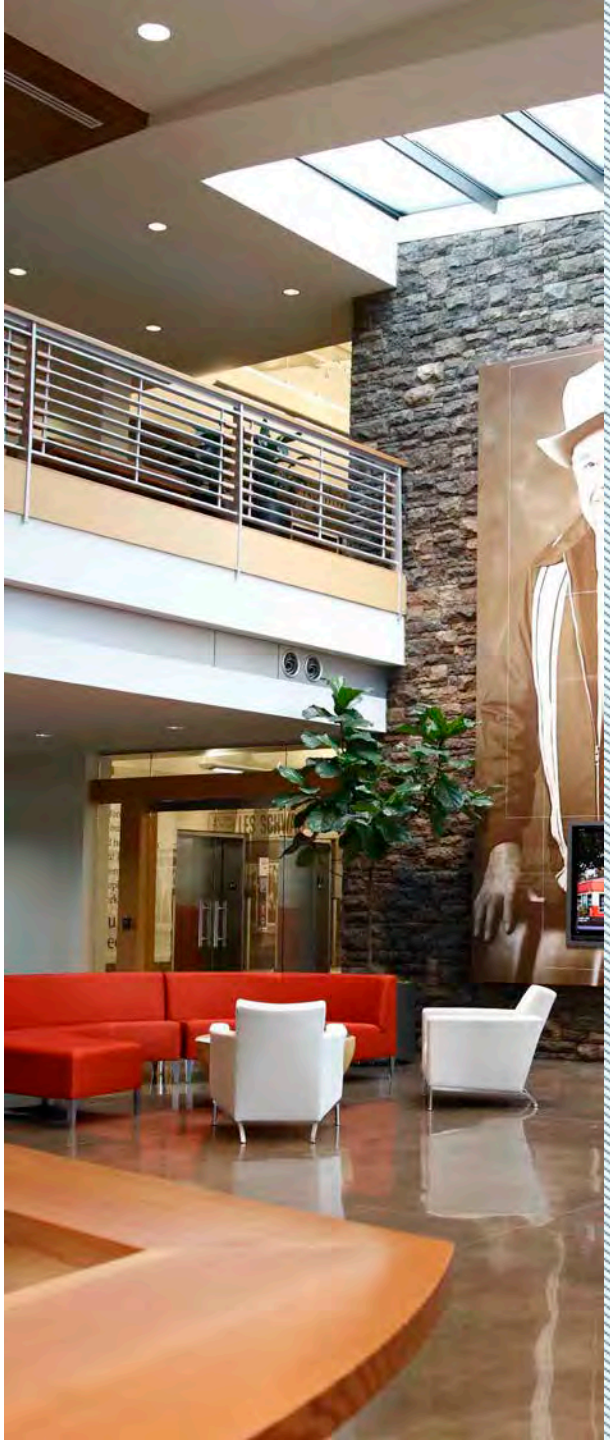
Energy Trust will utilize the utility cost test (UCT) to estimate building-level incentives for customers.

Overcoming barriers to invest

"What updates will the program make?"

New Buildings Technical Guidelines will be updated to:

- reference ASHRAE Appendix G for modeled projects
- offer guidance on how energy modeling should be completed



Thank you

Jessica Iplikci

Senior Program Manager, Commercial

EnergyTrust of Oregon

Energy Trust “Save For” Campaign

Mana Haeri
Marketing Manager—Energy Programs

Energy Trust of Oregon

Campaign Goal

Design and execute an INTEGRATED MARKETING COMMUNICATIONS CAMPAIGN to drive residential customers across our service territory to the best deals and incentives on energy-efficient technologies and services.

Key Objectives:

1. Increase REACH AND ENGAGEMENT among customers across Energy Trust's service territory, including communities of color, rural communities and low- to moderate-income customers.
2. Increase ADOPTION of key residential energy efficiency measures, such as smart thermostats and efficient water heaters during promotional periods. Give audiences a reason to "act now."

Timing: November 19, 2019 – November 2021

Challenges

- Appealing to a broad range of audiences
- Accommodating a range of technologies
- Balancing customer engagement and savings acquisition (savings versus value/service)
- Coordinating with multiple creative agencies

Solutions

- A rigorous process rooted in marketing best practices
- Transcreation, not translation
- A culturally elastic creative concept
- An integrated marketing communication campaign design
- Patience and self-awareness

Phase 1

Scoping

- Setting goal and objectives
- Bid process and selection

Discovery

- Research review
- Taking the “who” mindset

Strategic Planning

- Refining target audiences
- Channel strategies, KPIs and timing

Research

- Customer Insights Survey Results
- Propensity Modeling
- Past “My Home” Campaign Evaluation and Panel Survey Findings
- Residential Program Marketing Plan
- Oregon Community Foundation “Latinos in Oregon” Report

Target Audiences

- Likely adopters of Smart Thermostats
- Heat pump water heater adopters
- Rural customers
- Latinx/Hispanic communities (bilingual and monolingual)

Phase 2

Creative Ideation

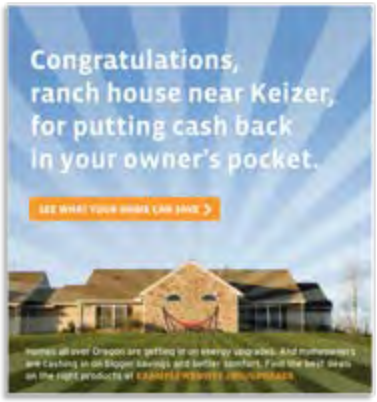
- Preliminary concepts
- Transcreation

Message Testing

- Four online focus groups
- Spanish-language survey

Message Testing

English



Spanish

Message Testing

Concept Rankings	Rationale
1 **Saving Suits You**	This concept's inclusive tone performed best in testing. It's a clear winner that can easily be modified to accommodate various product offerings and values.
2 **Save On, Save For**	The humor of the initial concept fell a little flat, but the feedback received gives actionable guidelines for shifting to an aspirational tone that will deeply resonate with Energy Trust's audiences.
3 **Get More**	While this campaign came out second place in testing, we believe it has less upside that an improved Save On, Save For campaign. The tone of this campaign grabs attention, but it will remain divisive even with changes. This campaign's reliance on specific product messages could also present challenges.
4 **See What Your Home Can Save**	People just didn't connect with this campaign in the same way they did with the others. Addressing the issues won't be possible without drastically reworking the campaign.

Final Concept

"Save for"

- Lead with the reason to save
- Introduce an aspirational message
- Focus on the pride of place, family and the future
- Make it about the audience and make it personal

Phase 3

Creative Development

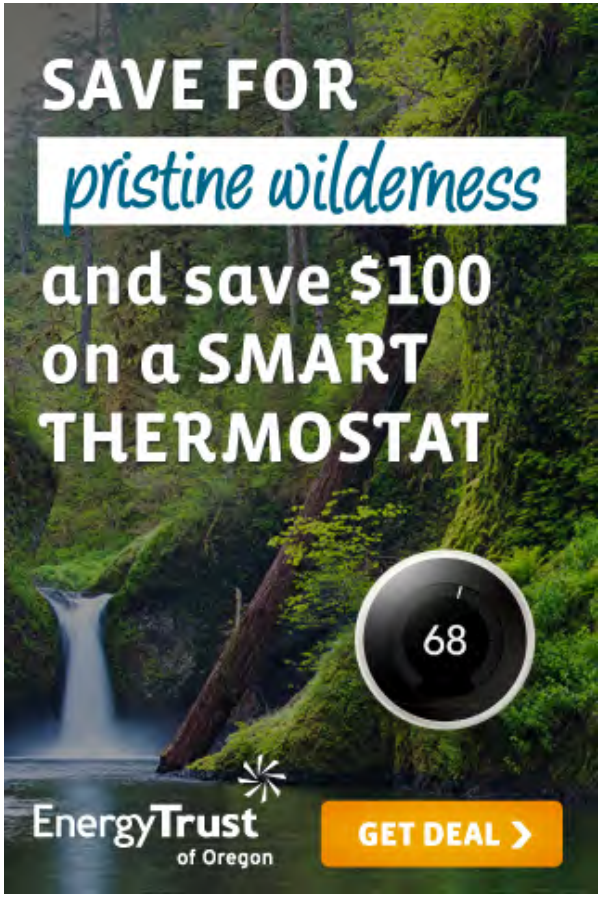
- Digital banners
- TV and radio
- Paid and organic social
- Web

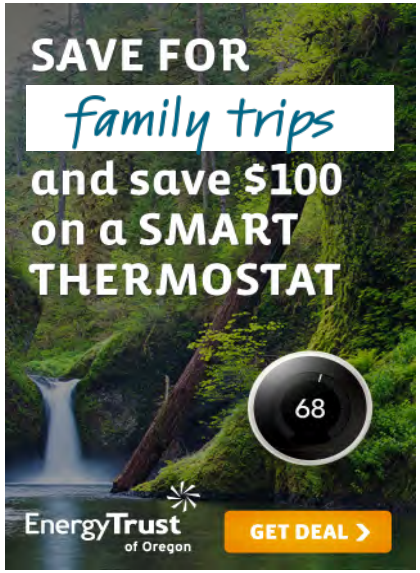
Execution

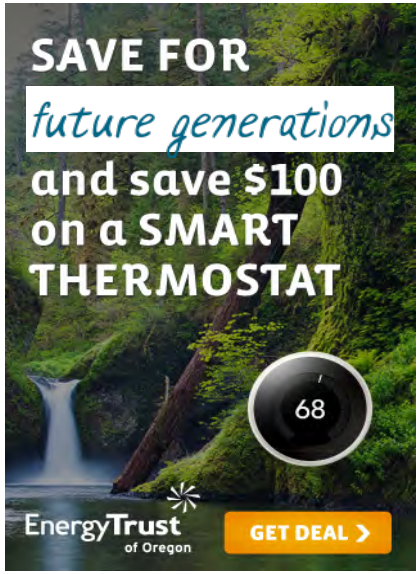
- Media buys
- PR coordination
- Coordination with PMC and program managers

NOVEMBER 19 LAUNCH

“Save For” Creative







“Save For” TV Ad

Phase 4

Tracking & Evaluation

- Coupon reservations
- Ad performance
- Web traffic and behavior
- Social engagement

Next Steps

- Photography
- Refine channel strategy as necessary
- Design and execute PR and influencer strategies
- Update creative and content

Thank you

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EnergyTrust of Oregon

Multifamily Program Assessment Update

Conservation Advisory Council
November 20, 2019

EnergyTrust of Oregon

Agenda

- Status
- Objectives
- Focus areas & priorities
- What’s next?

Project Status

Phase 1: Exploration	Phase 2: Options/Impacts	Phase 3: Concepts & Recommendations
January 2019 through March 2019	**April 2019 through June 2019**	**June/July 2019 through January 2020**

• Working sessions
  • Customer segments
  • Resource potential
  • Cost-effectiveness
  • Program delivery models
  • Vision planning
	• Continued working sessions
	• Stakeholder engagement
	• Savings resource planning
	• Develop and prioritize early concepts
		• Present early concepts to CAC, board & other stakeholders
		• Determine changes for program optimization in 2020
		• Present recommendations for program updates and structure for 2020 rebid

Objectives

Maintain a resilient and robust program with a suite of cost-effective offerings that will meet the diverse needs of multifamily customers in Energy Trust service territory.

- Ensure offerings reach and serve all multifamily customers
- Decrease market confusion and improve customer and contractor experience
- Explore non-energy benefits and cost-effectiveness approaches
- Increase participation rates by all multifamily customer segments

Concept themes

- Customer engagement
- Reaching underserved customers
- Driving and quantifying savings
- Future measure offerings

Customer Engagement

Focus Area	Priorities
Cross-program alignment	• Align incentive amounts and requirements across programs when possible • Focus on customer perspective in processes • Support trade allies as program ambassadors
Streamline midstream	• Streamline distributor engagement and processes with midstream offerings • Remain a resource for customers • Focus on increased access to midstream offerings

Reaching Underserved Customers

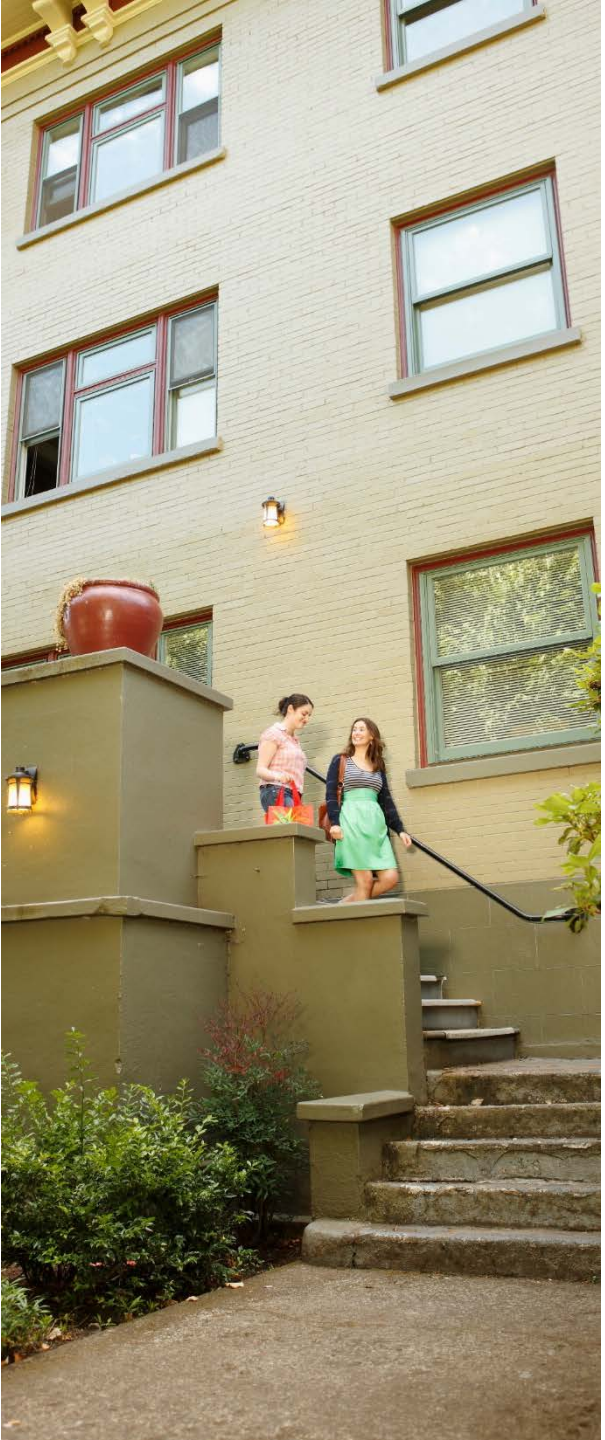
Focus Area	Priorities
New offerings for underserved customers	• Design program offerings based on customer type, not just building type • Continue discussions around defining “underserved” and data needs • Develop overarching strategy for serving renters
Renter engagement	• Identify resources and opportunities to directly serve tenants • Support Community Energy Project DIY cooling workshops • Explore additional partnerships

Driving & Quantifying Savings

Focus Area	Priorities
Differential baselines	• Develop comprehensive list of potential differential baselines to consider • Select set of measures to incorporate differential baselines into measure development approaches in 2020
Non-energy benefits	• 2020 research project on health non-energy benefits, led by Planning • Develop recommendations for non-energy benefits for existing multifamily customer segments

Future Measure Offerings

Focus Area	Priorities
New technologies	• Continue to monitor for new technologies • Pursue development work in 2020 on new measures
Comprehensive upgrades	• Identify strategies to drive repeat participation and whole-building upgrades
Other new opportunities	• Demand-response coordination opportunities with utilities • Leverage additional funding sources



Next Steps

2020 RFP for 2021 program services:

- Existing Buildings
- Existing Multifamily
- Commercial & Industrial Lighting

Questions?

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EnergyTrust of Oregon