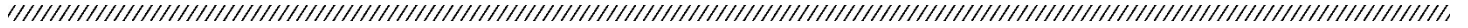


# Quarter Three 2020 Report to the Oregon Public Utility Commission & Energy Trust Board of Directors



**ENERGY TRUST OF OREGON**  
**November 13, 2020**



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A glossary of program descriptions and key terms is available online at [www.energytrust.org/reports](http://www.energytrust.org/reports)

# I Results at a glance<sup>1,2</sup>

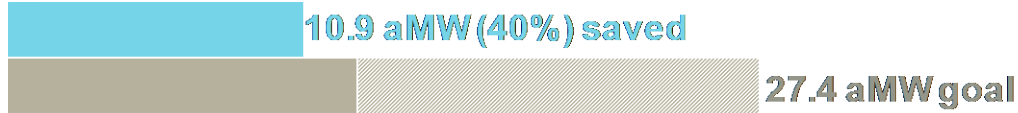
## Savings

 = Year-to-date goal  = Annual goal

### ⚡ Total electric savings



### ⚡ PGE



### ⚡ Pacific Power



### 🔥 Total gas savings



### 🔥 NW Natural



### 🔥 Cascade Natural Gas





### 🔥 Avista



<sup>1</sup> This document reports gross savings.

<sup>2</sup> Note that aMW indicates average megawatts, MMTh indicates million therms and MM is million.

## Generation

 = Year-to-date goal  = Annual goal

### Total renewable electric generation



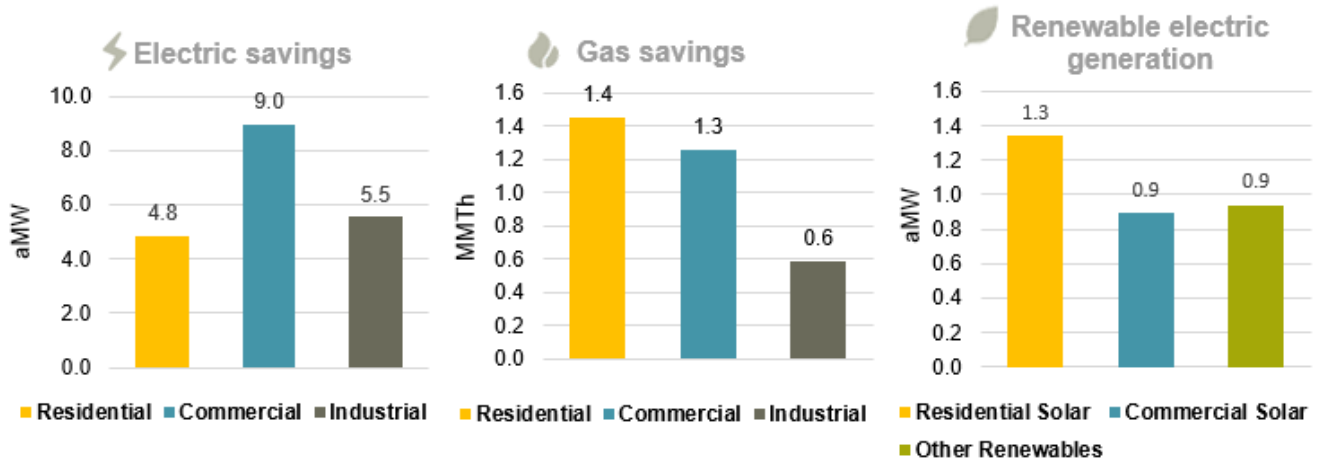
### PGE



### Pacific Power



## Savings and generation by sector year-to-date<sup>3</sup>



## Customer satisfaction<sup>4</sup>

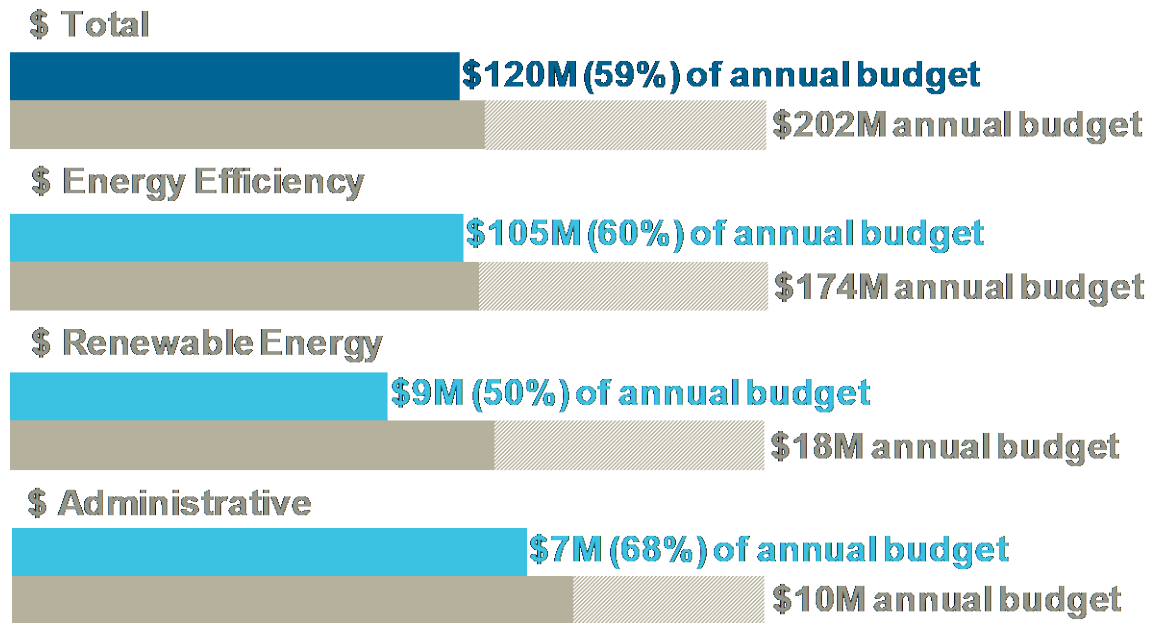


<sup>3</sup> Charts may not total due to rounding.

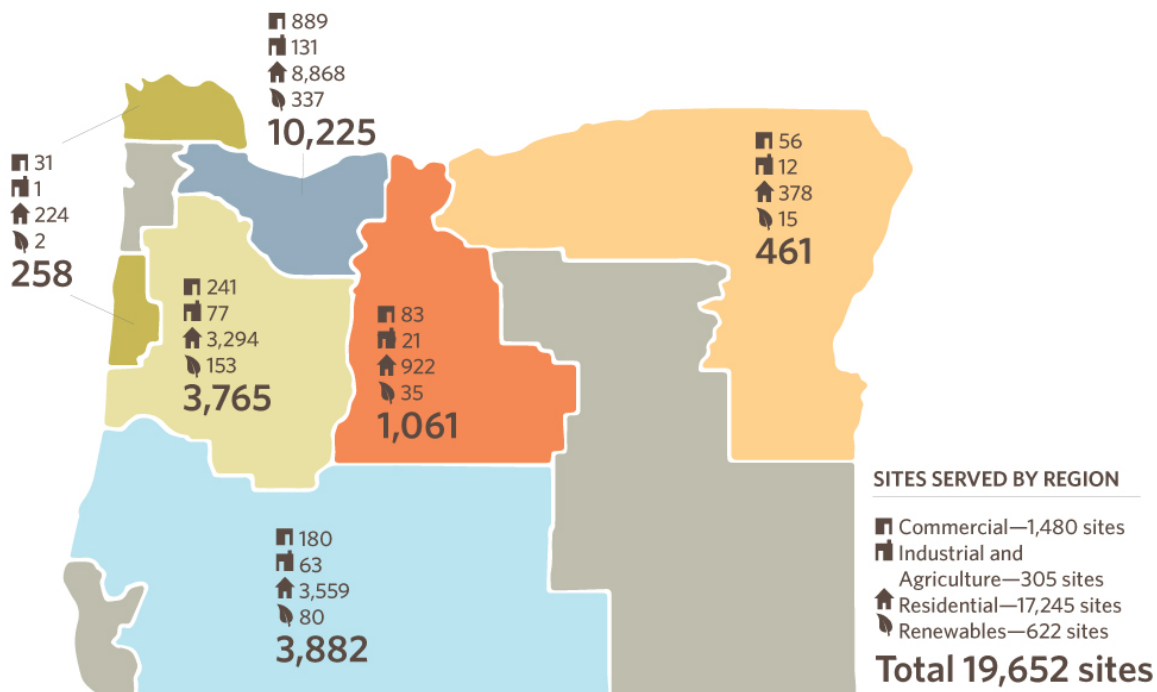
<sup>4</sup> From June to August of 2020, Energy Trust delivered a short web and telephone survey to 449 randomly selected participants in Oregon programs who completed projects between April and June and received an incentive or discount from Energy Trust.

## Oregon public purpose charge expenditures<sup>5,6</sup>

■ = Year-to-date budget    ▨ = Annual budget



## Sites served by region for the quarter<sup>7</sup>



<sup>5</sup> Expenditures include public purpose funds only. Low-income solar grants, Community Solar, NW Natural Washington activity and business development funds are not included. This information is available in the total organization results appendix.

<sup>6</sup> Administrative costs are different from administrative and program support costs defined by the OPUC's performance measure.

<sup>7</sup> This document reports on Energy Trust services to Oregon customers of Portland General Electric, Pacific Power, NW Natural, Cascade Natural Gas and Avista. Areas in gray are not served by these utilities. Sites served excludes products purchased from distributors and retailers.

## Progress to annual organization goals<sup>8</sup>

This table provides an at-a-glance update on Energy Trust’s progress toward 2020 organization goals, which were set as part of Energy Trust’s 2020 Budget and 2020-2021 Action Plan and approved by the board of directors. These goals reflect the organization’s priorities for the year and guide staff decision-making regarding allocation of resources. For more detail on progress to 2020 goals, see Section VI.

Goal	Status
Meet energy savings targets	On track
Meet renewable generation targets	On track
Create future opportunities	On track
Develop guidelines for resource investments in community efforts, engage stakeholders for input	On track
Provide information to policymakers, agencies and implementers	On track
Strengthen internal innovation capabilities, develop new proposals	On track
Make operational improvements	On track

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<sup>8</sup> Some savings targets for individual utilities are off track due to disruptions caused by the COVID-19 pandemic. For more information, see pages 12-16.

## II Executive summary

The body of this report now includes only activity funded by Oregon electric utility customers under state law and through regulatory agreements with natural gas utilities. A new appendix reports energy savings, generation, expenditures and revenue for all Energy Trust activity, including activity in NW Natural territory in Southwest Washington, Energy Trust's subcontract to deliver the Oregon Community Solar Program and other activity. This change will be reflected in all quarterly and annual reports going forward.

### A. Progress to energy efficiency and renewable energy goals

*The purpose of the quarter three report is to identify year-to-date savings and generation and preview expected achievement to year-end goals based on indicators such as pipelines and forecasts, with more information available than in quarter two.<sup>9</sup>*

- At the close of quarter three, **Energy Trust expects to exceed its annual energy efficiency goal for NW Natural's Oregon territory and achieve goals in Pacific Power and Avista territories. In Portland General Electric and Cascade Natural Gas territories, it expects to reach 90% or better of its annual goals.** These forecasts are improved since quarter two based on the success of bonuses, incentive changes and marketing efforts aimed at overcoming disruptions related to COVID-19. The forecast for NW Natural's Oregon territory is aided by a single large industrial project.
- **Electric efficiency improvements completed in quarter three saved 7.9 average megawatts of electricity, contributing to 19.3 aMW saved year-to-date.** Year-to-date savings account for 43% of the 2020 goal of 45.4 aMW.
- **Gas efficiency improvements completed during quarter three saved approximately 1.2 million therms of natural gas, contributing to 3.3 million therms saved year-to-date.** Year-to-date savings account for 51% of the 2020 goal of 6.5 million therms.
- **Renewable energy systems installed during quarter three will generate 0.98 aMW of electricity, contributing to 3.17 aMW of electricity year-to-date.** Year-to-date generation accounts for 97% of the 2020 goal of 3.27 aMW. Renewable energy programs are forecast to exceed goals for the year.

19.3

AMW SAVED IN 2020

3.3

MILLION THERMS  
SAVED IN 2020

3.17

AMW GENERATED IN  
2020

127,000

TONS OF CARBON  
DIOXIDE AVOIDED IN  
2020

<sup>9</sup> Each quarterly report serves a specific purpose for communicating activities: quarter one reflects efforts to build a pipeline of projects through analyses, studies and outreach to achieve annual savings and generation goals; quarter two highlights the organization's mid-year savings and generation, previews expected achievement of year-end goals based on early indicators and reflects priorities and needed changes to reach year-end goals; quarter three identifies year-to-date savings and generation and previews expected achievement to year-end goals based on indicators such as pipelines and forecasts, with more information available than in quarter two; quarter four reflects Energy Trust's final accomplishments and is delivered as an appendix to the annual report in April of the following year.

- **Year-to-date savings and generation achieved represent about 127,000 tons of carbon dioxide** kept out of the atmosphere, the equivalent of removing 27,000 cars from Oregon roads.

## B. Notable activities and trends

- **Energy Trust’s targeted and swift response to COVID-19 earlier in the year continues to pay off.** The success of residential offers—bolstered by strategic marketing and outreach efforts—and commercial and industrial lighting bonuses made up for savings gaps in other areas where activity was more affected by the pandemic. This shows the benefit of Energy Trust’s portfolio approach whereby offers across various sectors can balance out and make the organization more adaptable to market changes.
- To achieve energy savings that benefit utility ratepayers, **the residential sector has focused on delivering low- and no-cost energy saving products to vulnerable customers.** In quarter three, it partnered with Pacific Power to **deliver more than 5,000 Energy Saver Kits and 5,000 smart thermostats to rural and low-income customers.** It also distributed 30,000 LED bulbs to food pantries, community-based organizations and a community action agency to give away to their low-income clients.
- **Bonuses and offers launched in quarter two in response to the pandemic and economic uncertainty were more effective in motivating customers to complete projects** than forecasted in quarter two, particularly commercial and industrial lighting projects. In some cases, bonuses helped restart stalled projects and helped trade allies generate business that kept workers on the job. Bonuses have also helped attract previously disengaged contractors, particularly in rural communities.
  - Energy Trust is in the process of **scaling back certain offers and bonuses** to manage costs and avoid paying more in incentives than needed to move the market.
- **Energy Trust’s increased incentives and move to virtual delivery are driving up participation and savings** in commercial and industrial Strategic Energy Management, which helps customers save energy through no- or low-cost operations or process changes.
- In quarter three, the **Energy Trust board approved staff’s recommendation to award new program management and program delivery contracts** to deliver the Existing Buildings program including multifamily offers and business lighting offers starting in 2021. The new contracts expand on Energy Trust’s commitment to diversity, equity and inclusion by prioritizing diversity in subcontracts and program design. Changes to program structures, designed to improve efficiency and cost-effectiveness, are expected to save more than \$1 million in 2021.
- As wildfires raged across the state in September, staff quickly formed a cross-organizational team to **ensure Energy Trust is ready to respond to communities in their rebuilding efforts, particularly around energy savings and solar opportunities in new affordable housing.** This team, which involves program and outreach staff, draws on lessons learned from Energy Trust’s response to flooding in Umatilla County earlier in the year.
  - An early accomplishment of the fire response work is that Energy Trust has signed a contract with the Housing Authority of Jackson County to help fund a staff member dedicated to replacing affordable housing

**5,000**  
ENERGY SAVER  
KITS DELIVERED  
TO PACIFIC  
POWER  
CUSTOMERS



SUPPORTING  
AFFORDABLE  
HOUSING IN  
WILDFIRE  
RECOVERY  
EFFORTS

- including manufactured homes. This support is expected to yield engagement and energy savings opportunities in the future.
- Energy Trust continues to **work with Pacific Power and NW Natural on targeted load management pilots to save energy during times of peak energy use.**
    - With Pacific Power, Energy Trust stopped marketing efforts in the Phoenix and Talent areas following the devastation caused by the Alameda Fire. Increased incentives for offers that provide high peak demand reduction are still available. The project will wind down at the end of 2020 as scheduled.
    - In Creswell and Cottage Grove, the NW Natural project team increased incentives on cost-effective offers that deliver high peak demand reduction. The team worked to develop an outline and preliminary budget to provide further increased incentives based on a localized avoided cost value.
  - Helped by Energy Trust’s standard solar incentive and Oregon Department of Energy’s solar and storage incentive, **customers completed more solar projects in 2020 than initially anticipated.** Energy Trust began to see slowing in the solar market in quarter three, likely due to overall economic uncertainty and disruptions related to wildfires and smoke in September.
  - **Rural customers in Southern Oregon completed 79 lighting projects at small commercial, industrial and multifamily housing sites** in quarter three thanks to an Energy Trust tubular LED lighting promotion. Under the promotion, local trade allies install TLEDs at no cost to the customer.
  - **Energy Trust staff participated in OPUC workshops on the impact of COVID-19 on utility customers with low incomes,** providing information on low-income initiatives and co-funding approaches.
  - Staff is **monitoring and sharing learnings across the organization as state agencies implement Executive Order 20-04** on greenhouse gas emission reductions. Energy Trust is also attending OPUC working group meetings and will support commission staff with implementation in 2021.
  - **In July, a small group of employees returned to work at the Energy Trust office** with limits on daily capacity; the majority continue to work from home. Energy Trust tapped a staff member with public health work experience and expertise to **develop protocols and infection control strategies and to train staff.**
    - Since remote work began, IT staff has increased support for employees’ remote work by providing necessary equipment; upgrading the phone system to allow employees to make and receive calls on their cell phones; and increasing internet bandwidth at the office to accommodate additional connections.



CONNECTING  
RURAL  
CUSTOMERS TO  
NO-COST  
LIGHTING  
UPGRADES

## C. Updates requested by the OPUC

*This section provides information requested by the OPUC in comments provided on Energy Trust’s 2020 Budget and 2020-21 Action Plan, plus other information requested by OPUC staff.*

**Focus on decreasing transaction costs for high-volume activities, such as expediting the rollout of electronic signatures and automated form processing:**



- Energy Trust **completed 1,251 internal and customer facing electronic transactions using DocuSign** in quarter three, with 61% of transactions completed in under 24 hours. DocuSign forms launched in quarter three include several finance forms, multilingual media consent forms and a solar program participation agreement.
- **Nearly 1,200 hours of staff time have been saved following the addition of a corrections function** in 2019 to software that tracks projects and savings. Automating corrections such as payment reversals, measure reversals and check reissues cuts down on time staff members spend making corrections manually and enables them to focus on higher value work; it also improves tracking of corrections and helps prevent errors by identifying and addressing common sources of errors.

1,200

HOURS OF  
STAFF TIME  
SAVED BY  
SOFTWARE  
ENHANCEMENT

**Complete the measure development automation project in 2020:**

- The measure development automation project, completed in early 2020, was **critical to Energy Trust’s ability to avoid disruptions while working remotely** and is expected to save significant staff time in quarter four.

**Report on diversity, equity and inclusion initiative progress:**

- **Staff finalized updated diversity, equity and inclusion goals for 2021 that cover all areas of the organization**, from customer and contractor participation to hiring and staff makeup. These goals build on the successes and lessons learned under the current Diversity, Equity and Inclusion Operations Plan, which ends in 2020.
- The Solar program developed a **new higher incentive for systems installed by tribes and nonprofits that serve low-income families and other underserved groups** that will launch in quarter four. Staff collaborated with OPUC staff to develop eligibility language.
- Energy Trust **hosted an information session in July for potential Portland Clean Energy Community Benefits Fund (PCEF) grant applicants** to learn how Energy Trust programs, incentives and support could be leveraged for their project proposals. PCEF funding is intended to benefit underserved groups in Portland and presents an opportunity for Energy Trust to collaborate with community-based organizations to reach and serve customers not yet reached in the City of Portland.
- In August, Energy Trust **collaborated with LatinoBuilt, a trade organization working to improve opportunities in construction for Latino-owned businesses in Oregon**, on a virtual event to introduce residential and commercial retrofit programs for LatinoBuilt members. A panel of contractors discussed the benefits of installing energy-efficiency upgrades and enrolling in Energy Trust’s Trade Ally Network.



DIVERSITY,  
EQUITY AND  
INCLUSION  
GOALS FOR 2021

**Prioritize the future of the residential and multifamily sectors through activities such as pilot studies and program redesign:**

- **Energy Trust completed the selection process for a contractor to deliver the Existing Buildings program including multifamily offers starting in 2021.** Multifamily offers will now be delivered by the Existing Buildings program management contractor as a part of that contract. This change is meant to ensure Energy Trust achieves cost-effective savings for multifamily customers while capturing administrative efficiencies and supporting innovation.

**Report quarterly on complementary funds activities, tracking the status of co-funding opportunities and the outcomes of those arrangements:**

- **Energy Trust subcontracted with PGE to help deliver its Smart Battery Pilot**, which launched in fall 2020, and those funds are included in the appendix to this report. PGE will provide bill credits and upfront incentives for storage systems and enroll up to 525 residential customers with qualifying batteries that PGE can access. **Energy Trust is managing customer outreach, contractor education, quality management and incentive processing.** Customers may also choose to install solar with their batteries, which could qualify for an Energy Trust solar incentive. The contract extends through July 2025.
- Energy Trust held the first of four stakeholder engagements to offer updates on the Manufactured Home Replacement Pilot. **Rep. Pam Marsh, sponsor of House Bill 2896 that provides loans to support manufactured home park preservation and affordability for residents, spoke about the importance of Energy Trust’s pilot for residents in her Southern Oregon district** that includes Talent and Phoenix. She also spoke about the need for protections for manufactured home communities and affordable housing solutions for residents displaced by wildfires.
- Following OPUC approval to expand co-funding for electric measures with the community action agency in Washington County and additional community action agencies, Energy Trust is **negotiating with all three gas utilities to develop proposals to co-fund gas measures with community action agencies.**
- Energy Trust is a **subcontractor for Energy Solutions to do program development and delivery for Oregon Community Solar Program**, which launched in early 2020 and expects to certify its first project in quarter four. (Funds are reported in the total organization appendix.)



**SUPPORTING  
PGE SMART  
BATTERY PILOT**

**Update on co-funding with Oregon Housing and Community Services**

**Multifamily Energy Program:**

- In quarter three, the OPUC approved a **proposal for Energy Trust and Oregon Housing and Community Services to co-fund targeted affordable housing projects at existing multifamily properties.** The co-funding aims to drive additional savings through increased funding for projects that serve affordable housing and to expand project scopes and benefits for customers.



**APPROVED TO  
CO-FUND  
MULTIFAMILY  
PROJECTS**

**Complete the implementation of the budget tracking tool:**

- **Prophix, Energy Trust’s new budget tool, formally launched in quarter three and was used to complete Energy Trust’s Draft 2021 Budget and 2021-2022 Action Plan.** The online platform for budgeting incorporates planning, data analysis and reporting, and can accommodate more data than previous software and perform more accurate forecasting, including the ability to forecast different scenarios for 2021 budgeting.

**Identify and prioritize the organizational review recommendations that quantifiably either save costs or add flexibility:**

- Through the business planning process, **staff prioritized resources to support wildfire and COVID-19 response and diversity, equity and**

**inclusion activities in the draft 2021 budget.** All priorities will result in savings, generation and associated customer benefits.

- Once the business plan was finalized, staff **sequenced 2021 strategic initiatives and innovation projects to identify potential capacity constraints.** This is a new step in business planning meant to raise awareness about project resourcing and avoid having staff assigned to overlapping projects.
- Staff **identified IT enhancements for 2021 to increase efficiency** in developing, implementing and processing offerings that span multiple sectors or delivery channels.

**Report on updates and progress toward new offerings under the New Buildings program cost-effectiveness exceptions:**

- Staff continues to **participate in the group working to determine a cost-effective pathway forward for the whole building approach of the New Buildings program.** The group, which includes representatives from OPUC, Oregon Department of Energy and Northwest Energy Efficiency Alliance, is looking at issues surrounding measure-level savings analysis under the 2019 Oregon commercial energy code. Staff provided an update to the Conservation Advisory Council in July and will re-engage the council once the group has recommended a modeling approach for new construction projects, which will inform 2021 program design and budget development for 2022.



**PRIORITIZING  
COVID-19 AND  
WILDFIRE  
RESPONSE IN  
2021**

# III Program and operations activity

## A. Commercial sector highlights

*The commercial sector is comprised of three programs: Existing Buildings, Existing Multifamily and New Buildings, delivered in 2020 by Program Management Contractors ICF International, TRC Environmental and CLEAResult, respectively. The Existing Buildings program offers incentives for energy-efficient improvements in existing commercial buildings of all sizes. The Existing Multifamily program serves existing multifamily structures with two or more dwelling units, including market-rate housing, affordable housing, assisted living facilities, campus housing facilities, homeowners' associations and individual unit owners. The New Buildings program supports design and construction of high-performance commercial buildings and major renovations of all sizes and building types.*

- **The sector is on track to achieve its annual savings goal in Pacific Power territory.** It expects to fall short in all other utility territories due to fewer customers pursuing large custom projects and major renovations because of market disruptions related to COVID-19.
- Electric savings were driven by **Energy Trust's increased lighting incentives and promotion of direct installation of lighting in small businesses.** Incentives launched in quarter two also drove savings from new multifamily construction and construction by governments and school districts.
- Gas savings were driven by foodservice equipment and insulation projects in existing buildings **thanks to Energy Trust bonuses.**
- As bonuses lead to more activity than expected, the sector **is reducing or discontinuing some bonuses for quarter four** to manage costs and avoid paying more in incentives than needed to move the market.
- **Trade ally outreach staff used bonuses to target rural contractors and communities** that have not historically been engaged and developed best practices for reaching rural contractors, including a list of questions to reflect on when developing outreach strategies to these groups.
- Energy Trust's **ductless heat pump promotion for multifamily rentals** that launched in quarter two saw considerable uptake in quarter three, enrolling about 30 trade allies and completing 40 projects. The promotion—an extension of a residential offer—was extended through the end of the year with volume anticipated to continue to increase.
- Energy Trust provided **kits with energy-efficient products to more than 60 multifamily properties in quarter three, serving nearly 3,000 units.** Energy Trust launched the kits with energy-saving LEDs, low-flow water devices and advanced power strips in June when on-site installation was not feasible.
- Energy Trust provided a **grant to the Portland nonprofit Community Energy Project to deliver nearly 20 do-it-yourself cooling workshops** targeted at residents of affordable multifamily housing. Workshops were delivered virtually with supplies for do-it-yourself projects provided to attendees afterwards.

**3,000**  
MULTIFAMILY  
UNITS THAT  
RECEIVED FREE  
ENERGY-SAVING  
PRODUCTS

- To help **Strategic Energy Management customers through the pandemic**, the sector increased the intern incentive, added milestones incentives and delivered market-specific webinars to motivate participants to keep energy management practices a priority.
- In quarter three, Energy Trust completed outreach to eligible school districts to inform them of **changes that make it easier for schools to get public purpose charge funding** from Energy Trust and Oregon Department of Energy for energy-efficiency projects. All 106 eligible districts have been contacted, and Energy Trust staff has met with 86 districts to discuss new procedures and potential projects.
- **Commercial savings from NEEA activities** comprised approximately 3% of the sector's year-to-date savings in PGE territory, 4% in Pacific Power territory and under 1% in NW Natural, Cascade Natural Gas and Avista territories
  - Electric savings were driven by NEEA's influence on federal standards for fluorescent ballasts and the adoption of the state's commercial energy code.
  - Gas savings were driven by NEEA's condensing rooftop unit program.

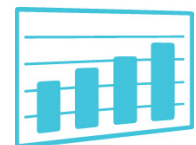


COMMUNICATED  
FUNDING CHANGE TO  
SCHOOL DISTRICTS

## B. Industrial and agriculture sector highlights

*The industrial and agriculture sector provides energy-efficiency solutions for all sizes and types of eligible industrial, agricultural, municipal water and wastewater customers. The Production Efficiency program provides services and incentives through three primary delivery tracks: standard, custom and energy performance management. Production Efficiency is designed and managed in-house by Energy Trust staff and is delivered to customers through Program Delivery Contractors and other market actors.*

- **The sector is on track to achieve** its annual savings goals in Cascade Natural Gas territory and exceed its goal in NW Natural territory but expects to **fall short** in PGE, Pacific Power and Avista territories.
- **Electric savings were driven by Energy Trust's lighting bonuses;** bonuses for standard projects also helped boost savings while reducing costs for customers. In Pacific Power territory, projected custom track savings increased due to the identification of several projects forecasted to close in 2020.
- Gas savings for the quarter were driven by bonuses for standard projects and insulation projects. Meanwhile, a **large regenerative thermal oxidizer project is expected to complete** by year-end for about 1 million therms in savings. The system captures heat from exhaust to reduce air pollutants, integrating energy efficiency into environmental remediation.
- As bonuses drive more activity than expected, the sector is **reducing standard project incentives and discontinuing lighting bonuses for quarter four** to manage costs and avoid paying more in incentives than needed to move the market.
- **Projected SEM savings have increased** as customers focus on low- and no-cost activities and are motivated by increased incentives. Moving to virtual delivery continues to enable broader and more frequent participation from enrolled customers.



BONUSES, VIRTUAL  
DELIVERY BOOSTED  
PROJECTED SEM  
SAVINGS

- **In-person activities with customers that adhere to safety guidelines have increased**, though staff continues to use remote tools for project verifications and data collection to initiate custom projects.
- As of quarter three, the sector has **implemented projects or studies with 85 new small or medium industrial businesses in rural areas** thanks to increased outreach and a no-cost TLED direct installation offer. Increasing industrial customer participation among small and medium businesses in rural areas is among Energy Trust’s diversity, equity and inclusion goals for 2020.
- **Industrial savings from NEEA activities** comprised approximately 6% of the sector’s year-to-date savings in PGE territory and 5% in Pacific Power territory. Savings were driven by NEEA’s influence on federal standards for the electric motor market. Energy Trust also invests in NEEA’s gas market transformation work but had no associated industrial savings this quarter.

## C. Residential sector highlights

*The residential sector provides electric and gas energy-efficiency solutions for residential customers of single-family homes, manufactured homes and newly constructed homes. The program is delivered through Program Management Contractor CLEARResult and through two Program Delivery Contractors supporting retail promotions and EPS new construction offerings. Incentives are available for smart thermostats, energy-efficient HVAC and water heating equipment, lighting, appliances, weatherization upgrades and whole home improvements, and new construction.*

- **The sector is on track to meet or exceed** its annual savings goals in all utility territories. Residential savings are making up for shortfalls in other sectors thanks to marketing and outreach efforts surrounding Energy Saver Kits and low-cost projects.
- Electric savings were driven by **Energy Trust’s strategic marketing and outreach efforts to promote retail lighting and Energy Saver Kits** as part of the organization’s COVID-19 response.
- Gas savings were driven by Energy Trust’s **efforts to promote Energy Saver Kits, smart thermostats and HVAC equipment**. EPS new construction and market transformation—Energy Trust’s work to increase adoption of energy-efficient technologies and practices—also drove savings.
- While COVID-19 continues to affect activity, **demand for new home construction remains strong amid a competitive real estate market** and low interest rates, with construction driving energy savings for the year.
- Energy Trust offers for space and water heating equipment are rebounding as **contractors and customers adjust to new social distancing and safety protocols** for installing equipment in homes.
- Energy Trust **distributed 30,000 LED bulbs in quarter three to 16 food pantries, 16 community-based organizations and one community action agency across the state to give away to their clients**, largely customers with lower incomes. This followed the launch in quarter two of an LED distribution program designed to reach underserved customers during the pandemic.

**30k**

**FREE LED  
BULBS  
DISTRIBUTED  
WITH AGENCY  
PARTNERS**

- **Staff worked with Pacific Power to deliver more than 5,000 Energy Saver Kits and 5,000 smart thermostats to customers** outside the Portland metro area and to low-income customers who have received bill pay assistance in the past. This offer was developed in response to COVID-19 and designed to support vulnerable low-income and rural customers.
- **Staff collaborated with NEEA to develop a fall heat pump water heater promotion through select trade ally contractors and online retailers**, supporting sales of 860 water heaters in quarter three. Through the promotion, participating contractors and retailers receive incentives from both organizations, with savings passed onto customers. Energy Trust also provides trade allies with aggregated data and marketing resources to promote the offer.
- In quarter three, Energy Trust **began recruiting customers for a wi-fi ductless heat pump control pilot in coordination with PGE**. The pilot will assess potential energy savings of controlling heat pump performance in relation to zonal electric heating systems; it will also look at demand response opportunities and user acceptance. The pilot will run through the 2020 heating season and be evaluated in late 2021.
- Staff is **working closely with NEEA and Oregon Department of Energy to provide technical expertise to the Oregon Building Codes Division** as it works to implement the state's next building code update in 2021. Energy Trust informs code development by providing information on current building practices observed in the market.
- **Residential savings from NEEA activities** comprised approximately 15% of the sector's year-to-date savings in PGE territory, 15% in Pacific Power territory, 0.5% in NW Natural territory, 1.5% in Cascade Natural Gas territory and 0.5% in Avista territory.
  - Electric savings were driven by NEEA's ductless heat pump initiative, which aims to accelerate the adoption of ductless heat pumps in electrically heated homes, and NEEA's influence on energy code adoption for single-family and multifamily homes in Oregon.
  - Gas savings were driven by NEEA's work to increase adoption of energy-efficient advanced building practices for single-family homes, and work to develop efficient gas water heating products.



**DELIVERED 5,000  
SMART  
THERMOSTATS  
WITH PACIFIC  
POWER**

## **D. Renewable energy sector highlights**

*The renewable energy sector is comprised of two programs delivered in-house by Energy Trust staff: Solar and Other Renewables. The Solar program offers standard incentives for smaller-scale distributed systems for residential, business, public sector and nonprofit customers. The program is focused on improving equitable access to solar for lower-income customers and expanding innovative applications of solar that provide greater value to communities or the grid. The Other Renewables program supports renewable energy projects up to 20 megawatts in nameplate capacity that generate electricity using biopower, geothermal, hydropower and community-scale, municipally owned wind technologies. The goal of the program is to support a range of renewable energy technologies and improve market conditions for their development by providing project development assistance incentives and installation incentives.*

- **The sector is on track to exceed** its annual generation goals in PGE and Pacific Power territories, though not by as much as predicted in the quarter two forecast. This is due to a hydropower project that has been delayed to 2021.
- Helped by Energy Trust incentives and Oregon Department of Energy’s solar and storage incentive, customers **completed more solar projects in 2020 than initially anticipated.**
- Energy Trust has begun to see **slowing in the solar market**; the number of new applications received in quarter three was down 3% from quarter two and 14% compared to quarter three of 2019. This is likely due to overall economic uncertainty and disruptions related to wildfires in September.
- As part of efforts to connect underserved customers with renewable energy, the solar team **developed a higher incentive for projects installed by tribes and nonprofits that serve low-income customers and other underserved groups.** Launching in quarter four, the incentive will cover about half of the cost of a standard solar system.
- Energy Trust signed a contract to **support PGE’s Smart Battery Pilot program to study energy storage solutions and support grid modernization.** Energy Trust is providing customer outreach, contractor education, quality management and upfront incentive processing in support of PGE’s pilot. PGE will provide bill credits and upfront incentives for storage systems and enroll up to 525 residential customers with qualifying batteries that PGE can access. While Energy Trust doesn’t offer incentives for storage systems, most people installing storage also install solar and may qualify for solar incentives. (Funding for the pilot is separate from public purpose charge funding and reported in the total organization appendix.)
- With funding from Energy Trust, Farmers Conservation Alliance is **assessing how existing irrigation district hydropower facilities in Hood River County could be used to power critical facilities during an outage.** The assessment will examine available generation and technical requirements that would need to be addressed, important information for future project planning.
  - Since 2015, Energy Trust and Farmers Conservation Alliance have worked together to support irrigation district modernization projects across the state, saving water and adding renewable energy where possible.
- Energy Trust supported the City of Prineville with project development assistance to complete a **feasibility assessment of a city-owned and operated system that converts biomass from wood into heat and power.** Assessments of woody biomass combined heat and power applications are happening at other commercial facilities in Prineville.
- Expected to complete in quarter four, **Three Sisters Irrigation District’s MacKenzie hydropower project in Central Oregon has been delayed** until 2021 due to a permitting issue.



## E. Internal operations highlights

*Energy Trust’s internal operations teams support all program and organizational functions. These operational functions include communications (sharing organizational news, information and milestones with stakeholders, public reporting and public relations); customer service (providing customers with online and phone assistance to help resolve questions or problems); general marketing (educating*



customers and stakeholders through advertising, web content, social media and other marketing efforts); trade and program allies (engaging and supporting Energy Trust's network of 2,300 contractors and allies statewide); general outreach (providing regional and statewide support to customers, trade allies, partners, utilities and community organizations); IT and business systems (maintaining and improving Energy Trust's technology and business infrastructure); and planning and evaluation (estimating costs and savings of efficiency programs, developing long-range savings forecasts and evaluating effectiveness and impact of offerings).

- To support contractor diversity, equity and inclusion, Energy Trust **teamed up with local trade partners to develop relationships and promote mutual goals**. In July, Energy Trust presented at Professional Business Development Group's monthly membership meeting to relay the benefits of energy efficiency and Energy Trust's Trade Ally Network. In August, Energy Trust collaborated with **LatinoBuilt, a trade organization working to improve opportunities in construction for Latino-owned businesses in Oregon**, on a virtual session on the benefits of installing energy-efficiency upgrades and enrolling in the Trade Ally Network.
- Through public relations efforts, **Energy Trust garnered 42 news articles in quarter three that represent a media value of more than \$1 million—what it would have cost to purchase the equivalent advertising space or time**. These strong results were due to success connecting Energy Trust's expertise to topics of high interest to reporters and consumers.
  - Three stories in major outlets on energy-saving tips for people spending more time at home and on indoor air quality tips during September's wildfires accounted for more than \$650,000 in media value.
- In July, Energy Trust launched a **business marketing campaign in English and Spanish to promote bonuses for commercial and industrial customers** in response to COVID-19. The campaign included social media and digital ads targeting small businesses that show how Energy Trust can be a resource for businesses weathering challenges related to the pandemic.
- Outreach staff is **supporting the Hood River community on the Hood River Energy Plan**, which was developed locally as a roadmap for understanding current and future energy use and generation. Energy Trust engages in community planning efforts to provide communities with information and support for energy projects that can deliver savings and generation for the benefit of utility customers. In quarter three, the City of Hood River and Hood River County signed participation agreements with Energy Trust to evaluate the city's high energy use facilities.
- **In Coos County, outreach staff supported efforts around housing** through a ductless heat pump program with Rogue Climate/Energize South Coast; discussions with Coquille Tribal Housing Authority on relationship opportunities; and new housing developments.
- **Outreach staff provided information about Energy Trust programs** to the Eastern Oregon Border Board, The Next Door in Hood River and Raíces in Hermiston. Staff also participated in the Next Door Plain Language workshop and provided guidance and training for AmeriCorps Resource Assistance for Rural Environment volunteers promoting energy initiatives in their communities.

**\$1M**

VALUE OF NEWS  
COVERAGE FOR  
THE QUARTER



SUPPORTING  
COMMUNITY-  
DRIVEN EFFORTS  
IN COOS AND  
HOOD RIVER  
COUNTIES

- Energy Trust is **supporting staff navigating new working environments**. Human resources offered training sessions that addressed the stresses of a sudden shift to remote work. For those working in the office or having off-site meetings, an internal response team developed off-site meeting protocols and a comprehensive incident response checklist in case of positive test results among in-office staff. Surveys show high awareness of safety protocols and high comfort with measures taken to mitigate risk of infection.
- **Energy Trust’s website received 177,611 visits** in quarter three, generating 474,570 pageviews. The vast majority of visitors were new visitors. Top landing pages for new visitors were the Energy Saver Kit order page (26,072 views), the residential incentives page (35,686 views) and the heating and cooling solutions page (15,265 views).
- **Energy Trust received 3,649 calls** to the main customer service line in quarter three, an increase of 4% compared with the same period in 2019 and an increase of nearly 30% compared to quarter two 2020, which is typically the low season for call volumes.
- **Energy Trust received 370 emails** to its general customer service address in quarter three, an increase of 7% compared with the same period in 2019 and an increase of 36% compared with quarter two 2020. Email volumes typically follow the same cycle as call volumes.
- IT staff completed an upgrade to the internal Project Tracking system to **improve performance for users and decrease software development time** for future enhancements. Staff also cleaned up outdated data points in PT to improve data quality and reporting.
- Planning staff and analysts continue to develop resources for Energy Trust staff to fulfill data requests. **Numerous reports have been created to provide real-time data for use by program managers and field staff** across the state in conversations with potential customers, community leaders and stakeholders.
- In quarter three, **staff processed 16,498 customer projects** in Energy Trust systems, including 13,644 submitted through web applications.
- **Planning staff published 33 new Measure Approval Documents (MADs) and approved 243 requests for product versions** used to book savings and pay incentives in Energy Trust’s project tracking system based on approved measures.
- Planning staff **supported PGE, Avista and Pacific Power on developing their Integrated Resource Plans**.



**HELP FOR STAFF  
IN NEW WORK  
ENVIRONMENT**

## IV Revenues and expenditures tables<sup>10,11</sup>

This section reports on revenue and expenditures for Oregon activity funded by Oregon ratepayers under SB 1149, SB 838 and individual gas utility tariffs. Quarterly and annual reports will now include a total organization results appendix that reports energy savings, generation, expenditures and revenue for all Energy Trust activity, including activity in NW Natural territory in Southwest Washington, Energy Trust's subcontract to deliver the Oregon Community Solar Program and a federal grant to connect people with low and moderate incomes to solar energy.

### A. Oregon public purpose charge revenues and expenditures summary<sup>12</sup>

- **Revenues totaled \$38.2 million for quarter three 2020**, 1% over what was budgeted.
- **Expenditures totaled \$44.6 million**, on par with budget. More than half of expenditures, or \$23.9 million, was for incentives.
- **Electric efficiency expenditures** were 2% above budget.
- **Gas efficiency expenditures** were 7% below budget.
- **Renewable energy expenditures** were 11% below budget.
- **Administrative costs** were \$2.2 million, 11% below budget.
- **Administrative and program support costs as defined by the OPUC's performance measure** were \$2.99 million.<sup>13</sup> In addition to administrative costs, this figure includes program costs in the following areas: program management, program delivery, program incentives, program payroll and related expenses, outsourced services, planning and evaluation services, customer service management and Trade Ally Network management.

### B. Oregon public purpose charge revenues<sup>14</sup>

Source	Q3 actual revenues	Q3 budgeted revenues
Portland General Electric	\$ 8,733,065	\$ 9,162,587
PGE Incremental	\$ 11,125,890	\$ 10,825,934
Pacific Power	\$ 6,564,179	\$ 6,293,568
Pacific Power Incremental	\$ 7,738,010	\$ 7,687,488
NW Natural	\$ 1,763,796	\$ 1,679,623
NW Natural Industrial DSM	\$ 1,393,862	\$ 1,395,195
Cascade Natural Gas	\$ 325,238	\$ 290,290
Avista	\$ 518,323	\$ 518,323
<b>Total</b>	<b>\$ 38,162,363</b>	<b>\$ 37,853,008</b>

<sup>10</sup> Columns may not total due to rounding.

<sup>11</sup> The gas savings do not include results for NW Natural in Washington. These results are available in the total organization results appendix.

<sup>12</sup> Totals are lower than in previous reports due to reporting changes. Low- and moderate-income solar grants, Community Solar and business development funds are no longer included.

<sup>13</sup> The performance measure limits administrative and program support costs for the year in relation to annual revenues and year-over-year growth.

<sup>14</sup> Revenues in Table B include public purpose revenue, including incremental electric revenue from SB 838. Incremental revenues are those authorized under SB 838 to support capturing additional cost-effective electric efficiency savings above the amount supported by funding through SB 1149.

### C. Oregon public purpose charge expenditures

Source	Q3 actual expenditures	Q3 budgeted expenditures
Portland General Electric \$	22,228,799 \$	22,051,298
Pacific Power \$	15,968,022 \$	15,573,345
NW Natural \$	4,394,860 \$	4,801,613
NW Natural Industrial DSM \$	1,154,277 \$	1,018,906
Cascade Natural Gas \$	451,998 \$	659,841
Avista \$	379,578 \$	354,937
<b>Total \$</b>	<b>44,577,533 \$</b>	<b>44,459,940</b>

### D. Oregon public purpose charge expenditures by sector and program

	Q3 actual expenditures	Q3 budgeted expenditures
Commercial	Existing Buildings \$	10,533,506 \$
	Existing Multifamily \$	2,265,912 \$
	New Buildings \$	4,459,808 \$
	NEEA Commercial \$	652,601 \$
	<b>Commercial total \$</b>	<b>17,911,827 \$</b>
Industrial	Production Efficiency \$	7,810,826 \$
	NEEA Industrial \$	20 \$
	<b>Industrial total \$</b>	<b>7,810,846 \$</b>
Residential	Residential \$	12,366,372 \$
	NEEA Residential \$	1,030,892 \$
	<b>Residential total \$</b>	<b>13,397,264 \$</b>
<b>Energy efficiency total \$</b>		<b>39,119,937 \$</b>
Renewables	Solar \$	2,494,580 \$
	Other Renewables \$	802,661 \$
	<b>Renewable generation total \$</b>	<b>3,297,241 \$</b>
<b>Administration \$</b>		<b>2,160,355 \$</b>
<b>Total \$</b>		<b>44,577,533 \$</b>

### E. Incentives paid

Qtr	PGE efficiency	Pacific Power efficiency	NW Natural efficiency	Cascade Natural Gas efficiency	Avista efficiency	PGE generation	Pacific Power generation	Total
Q1	\$ 5,580,213	\$ 4,103,630	\$ 2,880,466	\$ 193,953	\$ 71,170	\$ 523,516	\$ 669,645	\$14,022,593
Q2	\$ 8,499,559	\$ 6,425,756	\$ 2,248,167	\$ 291,711	\$225,009	\$1,457,679	\$ 996,914	\$20,144,794
Q3	\$10,570,367	\$ 7,431,809	\$ 3,255,486	\$ 267,255	\$209,970	\$1,149,134	\$ 994,797	\$23,878,818
<b>Total</b>	<b>\$24,650,138</b>	<b>\$17,961,195</b>	<b>\$ 8,384,119</b>	<b>\$ 752,919</b>	<b>\$506,149</b>	<b>\$3,130,329</b>	<b>\$2,661,356</b>	<b>\$58,046,205</b>

## V Savings and generation tables<sup>15,16,17,18,19</sup>

### A. Savings and generation by fuel

	Q3	YTD	Annual	Percent
	savings/generation	savings/generation	goal	achieved YTD
Electric savings	7.9 aMW	19.3 aMW	45.4 aMW	43%
Natural gas savings	1,177,794 therms	3,297,875 therms	6,526,799 therms	51%
Electric generation	0.98 aMW	3.17 aMW	3.27 aMW	97%

### B. Progress toward annual efficiency goals by utility

	Q3 savings	YTD savings	Annual goal	Percent achieved YTD	Annual IRP target	Percent achieved YTD
Portland General Electric	4.6 aMW	10.9 aMW	27.4 aMW	40%	30.5 aMW	36%
Pacific Power	3.3 aMW	8.4 aMW	18.0 aMW	47%	19.2 aMW	44%
NW Natural	1,014,703 therms	2,823,140 therms	5,591,966 therms	50%	6,018,697 therms	47%
Cascade Natural Gas	75,429 therms	259,823 therms	547,244 therms	47%	621,804 therms	42%
Avista	87,662 therms	214,912 therms	387,588 therms	55%	313,420 therms	69%

<sup>15</sup> Columns may not total due to rounding.

<sup>16</sup> This document reports gross savings.

<sup>17</sup> Electric savings also include transmission and distribution savings.

<sup>18</sup> Gas savings do not include results for NW Natural in Washington. These results are available in the total organization results appendix.

<sup>19</sup> Energy Trust reports 100% of generation and capacity for renewable energy installations supported by Energy Trust's cash incentives. While some of these projects have additional sources of funding, Energy Trust enabled project completion.

### C. Electric savings by sector and program

		Q3 savings	YTD savings	Annual goal	Percent
		aMW	aMW	aMW	achieved YTD
Commercial	Existing Buildings	2.1	5.6	13.1	43%
	Existing Multifamily	0.3	0.8	1.5	55%
	New Buildings	1.1	2.2	4.8	47%
	NEEA Commercial	0.2	0.3	0.7	48%
<b>Commercial total</b>		<b>3.6</b>	<b>9.0</b>	<b>20.0</b>	<b>45%</b>
Industrial	Production Efficiency	1.9	5.3	17.1	31%
	NEEA Industrial	0.1	0.3	0.8	37%
<b>Industrial total</b>		<b>2.0</b>	<b>5.5</b>	<b>17.9</b>	<b>31%</b>
Residential	Residential	1.9	4.1	5.5	75%
	NEEA Residential	0.4	0.7	1.9	37%
<b>Residential total</b>		<b>2.2</b>	<b>4.8</b>	<b>7.4</b>	<b>65%</b>
<b>Total electric savings</b>		<b>7.9</b>	<b>19.3</b>	<b>45.4</b>	<b>43%</b>

### D. Natural gas savings by sector and program

		Q3 savings	YTD savings	Annual goal	Percent
		therms	therms	therms	achieved YTD
Commercial	Existing Buildings	185,739	885,076	1,757,530	50%
	Existing Multifamily	32,092	110,995	204,919	54%
	New Buildings	149,511	263,071	548,061	48%
	NEEA Commercial	91	183	456	40%
<b>Commercial total</b>		<b>367,433</b>	<b>1,259,326</b>	<b>2,510,966</b>	<b>50%</b>
Industrial	Production Efficiency	250,923	588,788	1,514,698	39%
	NEEA Industrial	0	0	0	-
<b>Industrial total</b>		<b>250,923</b>	<b>588,788</b>	<b>1,514,698</b>	<b>39%</b>
Residential	Residential	554,990	1,440,868	2,478,903	58%
	NEEA Residential	4,447	8,893	22,232	40%
<b>Residential total</b>		<b>559,437</b>	<b>1,449,761</b>	<b>2,501,135</b>	<b>58%</b>
<b>Total natural gas savings</b>		<b>1,177,794</b>	<b>3,297,875</b>	<b>6,526,799</b>	<b>51%</b>

### E. Renewable energy generation by utility

		Q3 generation	YTD generation	Annual goal	Percent achieved
		aMW	aMW	aMW	YTD
Portland General Electric		0.56	2.11	2.25	94%
Pacific Power		0.42	1.06	1.02	104%
<b>Total</b>		<b>0.98</b>	<b>3.17</b>	<b>3.27</b>	<b>97%</b>

**F. Renewable energy generation by program**

	Q3 generation	YTD generation	Annual goal	achieved
	aMW	aMW	aMW	YTD
Solar	0.98	2.23	2.24	100%
Other Renewables	0.00	0.94	1.03	91%
<b>Total generation</b>	<b>0.98</b>	<b>3.17</b>	<b>3.27</b>	<b>97%</b>

**G. Incremental utility SB 838 expenditures<sup>20</sup>**

Utility	Q3 SB 838 Expenditures	YTD SB 838 Expenditures
Portland General Electric \$	214,462 \$	797,628
Pacific Power \$	231,785 \$	524,438
<b>Total \$</b>	<b>446,248 \$</b>	<b>1,322,066</b>

<sup>20</sup> Reflects expenditures by Pacific Power and PGE in support of utility activities described in SB 838. Reports detailing these activities are submitted annually to the OPUC.

## VI Progress to 2020 organization goals

This section provides updates on Energy Trust’s progress toward meeting its 2020 organization goals, which were set as part of Energy Trust’s 2020 Budget and 2020-2021 Action Plan approved by the board of directors. Updates are provided in quarterly and annual reports. This information represents highlights and is not comprehensive. For more information, see program and operations highlights in this report.

Goal	Status and highlights
<p>1. Meet savings and generation targets, create future opportunities</p> <ul style="list-style-type: none"> <li>• Serve more diverse customers</li> <li>• Support higher value renewable energy and energy efficiency</li> <li>• Sustain services for efficiency programs where cost-effectiveness is becoming a challenge</li> <li>• Push new construction beyond code</li> </ul>	<p>On track to meet goal:</p> <ul style="list-style-type: none"> <li>• Bonuses and program changes launched in quarter two continue to generate savings and improve savings forecasts over early projections.</li> <li>• The residential and renewable sectors are on track to achieve annual goals for the year, while the industrial sector is on track to achieve its gas savings goal for the year.</li> <li>• Recently awarded Existing Buildings and business lighting contracts starting in 2021 prioritized diversity, equity and inclusion in subcontracts and customer service.</li> <li>• The solar team is preparing to offer higher incentives for projects installed by tribes and nonprofits that serve low-income families and other underserved groups.</li> <li>• An internal team finalized diversity, equity and inclusion goals for 2021 that cover all areas of the organization.</li> </ul>
<p>2. Develop guidelines for resource investments in community efforts, engage stakeholders for input</p> <ul style="list-style-type: none"> <li>• Coordinate with utility efforts in communities</li> <li>• Build capacity in communities and community-based organizations</li> <li>• Strengthen internal capabilities to support community efforts</li> <li>• Develop toolkits and templates</li> </ul>	<p>On track to meet goal:</p> <ul style="list-style-type: none"> <li>• An internal team is developing community engagement guidelines as a staff resource to prioritize and enhance work with communities.</li> <li>• The team conducted research on community-based organizations and presented to advisory councils and utility coordination meetings with Avista and Pacific Power.</li> <li>• Key tasks were the development of a screening tool, framework visuals, classification of program offers and integration of customer feedback.</li> </ul>
<p>3. Provide information to policymakers, agencies and implementers</p> <ul style="list-style-type: none"> <li>• OPUC</li> <li>• Portland’s Clean Energy Fund</li> <li>• State carbon policy development</li> <li>• Communities forming clean energy objectives</li> </ul>	<p>On track to meet goal:</p> <ul style="list-style-type: none"> <li>• Staff participated in OPUC workshops on the impact of COVID-19 on low-income utility customers, providing information on low-income initiatives and co-funding approaches.</li> <li>• Staff participated in OPUC processes and dockets</li> <li>• Staff provided information as a public purpose charge program administrator to ongoing stakeholder discussions on this funding source.</li> <li>• Staff continues to make connections between Energy Trust programs and community-led sustainability programs or plans to achieve</li> </ul>



	<p>energy savings and renewable energy generation.</p> <ul style="list-style-type: none"> <li>• Staff responded to requests and informed the OPUC's work plans related to Executive Order 20-04 on greenhouse gas emission reductions. Staff continues to monitor and share learnings across the organization as state agencies implement the order.</li> </ul>
<p>4. Strengthen internal innovation capabilities, develop new proposals</p> <ul style="list-style-type: none"> <li>• Establish an Innovation Team and resourcing initiatives</li> <li>• Develop an innovation approach</li> <li>• Adopt a framework, processes and tools</li> </ul>	<p>On track to meet goal:</p> <ul style="list-style-type: none"> <li>• Innovation Team supported and consulted with four internal teams working on ideas.</li> <li>• The team supported early development of two 2021 strategic initiatives: Rural Community Energy Planning (a process to support local leaders with energy planning and resiliency) and Operationalization of Peak Tracking and Reporting (to better represent the value of peak reduction benefits Energy Trust brings to utility customers).</li> </ul>
<p>5. Make operational improvements</p> <ul style="list-style-type: none"> <li>• Budgeting tools</li> <li>• Forecasting</li> <li>• Staff development</li> <li>• Alignment of systems, data and reporting</li> <li>• Collaborations</li> </ul>	<p>On track to meet goal:</p> <ul style="list-style-type: none"> <li>• Prophix was in production by July and is the system of record for the 2021 budget.</li> <li>• Several management training sessions were well attended.</li> <li>• Product Delivery Alignment, which seeks to recommend process and system improvements to facilitate innovative program designs, was approved as a strategic initiative for 2021.</li> </ul>

# APPENDIX 1: Total organization results

This appendix provides information on Energy Trust's energy savings and generation results as well as revenue and expenditures for programs beyond those funded by Oregon utility customers under state law and through regulatory agreements with natural gas utilities. This includes activity in NW Natural territory in Southwest Washington, Energy Trust's subcontracts to deliver the Oregon Community Solar Program and support PGE's Smart Battery Pilot and expenditures for a grant from the U.S. Department of Energy to increase access to solar energy for low- and moderate-income communities. Energy Trust also receives revenue from investments and spends on business development.

This appendix will appear in quarterly and annual reports to the OPUC as of Q3 2020 and going forward.

## A. Total organization revenue

Source	Q3 actual revenues	Q3 budgeted revenues
Oregon PPC programs \$	38,162,363 \$	37,853,008
NW Natural Washington \$	850,761 \$	852,094
Oregon Community Solar Program \$	115,036 \$	137,715
Low- and moderate-income grant \$	- \$	-
PGE Smart Battery Pilot \$	7,623 \$	-
Revenue from investments \$	38,096 \$	250,000
<b>Total \$</b>	<b>39,173,879 \$</b>	<b>39,092,818</b>

## B. Total organization expenditures<sup>21,22</sup>

Source	Q3 actual expenditures	Q3 budgeted expenditures
Oregon PPC programs \$	44,577,533 \$	44,459,940
NW Natural Washington \$	446,759 \$	587,045
Oregon Community Solar Program \$	68,514 \$	94,451
Low- and moderate-income grant \$	123 \$	-
PGE Smart Battery Pilot \$	4,388 \$	-
Business development \$	2,733 \$	-
<b>Total \$</b>	<b>45,100,050 \$</b>	<b>45,141,437</b>

<sup>21</sup> Business development funds went toward the PGE Smart Battery Pilot.

<sup>22</sup> The LMI solar federal grant funded project is complete. Minor cost adjustments may continue through the balance of the year. Expenditures excluding administration are higher than when administration is included due to a negative administration cost.

### C. Total organization expenditures by activity<sup>22</sup>

		Q3 actual expenditures	Q3 budgeted expenditures
	<b>Oregon PPC programs</b>	<b>\$ 42,417,178</b>	<b>\$ 42,027,913</b>
	NW Natural Washington programs	\$ 425,609	\$ 556,512
	Oregon Community Solar Program	\$ 65,317	\$ 90,728
Other	Low- and moderate-income grant	\$ 149	\$ -
	PGE Smart Battery Pilot	\$ 4,149	\$ -
	Business development	\$ 2,733	\$ -
	<b>Other Total</b>	<b>\$ 497,958</b>	<b>\$ 647,240</b>
	<b>Administration</b>	<b>\$ 2,184,914</b>	<b>\$ 2,466,284</b>
	<b>Total expenditures</b>	<b>\$ 45,100,050</b>	<b>\$ 45,141,437</b>

### D. Total organization savings and generation by fuel

	Q3 savings/generation	YTD savings/generation	Annual goal	Percent achieved YTD
<b>Electric savings</b>	7.9 aMW	19.3 aMW	45.4 aMW	43%
<b>Natural gas savings</b>	1,222,452 therms	3,416,394 therms	6,866,130 therms	50%
<b>Electric generation</b>	0.98 aMW	3.17 aMW	3.27 aMW	97%

### E. Total organization progress toward annual efficiency goals by utility

	Q3 savings	YTD savings	Annual goal	Percent achieved YTD	Annual IRP target	Percent achieved YTD
<b>Portland General Electric</b>	4.6 aMW	10.9 aMW	27.4 aMW	40%	30.5 aMW	36%
<b>Pacific Power</b>	3.3 aMW	8.4 aMW	18.0 aMW	47%	19.2 aMW	44%
<b>NW Natural</b>	1,014,703 therms	2,823,140 therms	5,591,966 therms	50%	6,018,697 therms	47%
<b>Cascade Natural Gas</b>	75,429 therms	259,823 therms	547,244 therms	47%	621,804 therms	42%
<b>Avista</b>	87,662 therms	214,912 therms	387,588 therms	55%	313,420 therms	69%
<b>NW Natural Washington</b>	44,658 therms	118,519 therms	339,331 therms	35%	N/A	N/A

**F. Total organization renewable energy generation by utility**

	<b>Q3 generation</b>	<b>YTD generation</b>	<b>Annual goal</b>	<b>Percent achieved</b>
	<b>aMW</b>	<b>aMW</b>	<b>aMW</b>	<b>YTD</b>
Portland General Electric	0.56	2.11	2.25	94%
Pacific Power	0.42	1.06	1.02	104%
<b>Total</b>	<b>0.98</b>	<b>3.17</b>	<b>3.27</b>	<b>97%</b>