Executive Summary

Energy Trust's 2023-2024 Action Plan highlights strategies and activities for all programs, program support groups and general management to accomplish the following 2023 goals (short form) and associated energy savings and generation.

Goal 1: Customers will save and generate energy and reduce costs in 2023 and beyond as a result of Energy Trust's investments in their clean energy projects and upgrades.

Goal 2: Utility partners, communities and policy implementers will achieve their objectives by leveraging Energy Trust's clean energy solutions that reduce greenhouse gas emissions, support grid management and deliver additional societal benefits.

Goal 3: Customers and stakeholders will gain future benefits from Energy Trust's investments in preparing for a more dynamic and complex energy industry.

In each action plan, we highlight the program or function's significant new activities for 2023 and expected changes for 2024.

Context

Energy Trust expects 2023 to be a dynamic year.

Inflation, supply chain disruptions and labor shortages are all likely to continue, driving up prices and posing a challenge for customers trying to scope and complete projects. Increasing prices also threaten cost-effectiveness for some measures and projects. Affordability and comfort remain key concerns for customers, especially as the cost of living increases. The potential for reduced economic growth, an unpredictable political landscape and potential for policy changes at the state and federal level will all add to market volatility. Impacts of climate change—including excessive heat, drought and wildfires—are of high interest to communities, policymakers and stakeholders, who are asking for greater emphasis on resilient buildings, flexible and adaptable energy systems, environmental justice and equity.

Low awareness, lack of information and high upfront costs remain high barriers for customers where significant savings potential remains and that Energy Trust has underserved in the past, especially renters, those in rural areas, those with lower incomes and communities of color.

Oregon and Southwest Washington are expected to see significant funding resources as a result of the recently passed federal Inflation Reduction Act and Infrastructure Investment and Jobs Act and grants awarded for improvements in clean energy, regenerative agriculture/green infrastructure and workforce development through the Portland Clean Energy Community Benefits Fund.

Meanwhile, our utility partners are responding to requirements around decarbonization. Utilities, the Oregon Public Utility Commission and Energy Trust are aligned in viewing acceleration of energy efficiency acquisition as the top priority for complying with greenhouse gas emission and carbon reduction goals established by the state. Energy Trust's 2023 budget and action plans are responsive to this interest in accelerating acquisition, and investments in 2023 will enable us to set and achieve more ambitious energy savings goals as soon as market barriers to customer participation subside. We will also coordinate more closely with utilities in areas that intersect with our work, such as load flexibility, decarbonization, demand-side management, distribution system planning and equity.

Energy Trust will continue in 2023 to prioritize the needs of customers and communities we have historically underserved. We have learned that reaching these customers requires new engagement approaches to build trust, including working in partnership with community-based organizations and liaisons to reach and serve community members and, in some cases, to co-develop new approaches. Our work engaging communities and community-based organizations to learn, partner and develop new approaches will continue. We will also continue to leverage new supplier diversity policies and tracking systems to ensure the benefits of clean energy investments are extending to businesses that are certified as minority and/or women owned through the Oregon Certification Office for Business Inclusion and Diversity (COBID).

Diverse perspectives and ideas contribute to the creation of equitable solutions to support all communities in realizing the benefits of clean energy solutions. We are committed to evolving into a more diverse and inclusive organization to effectively serve customers we have historically underserved.

Action Plan Table of Contents

General Management

Key Contact: Michael Colgrove, Executive Director

Programs

Key Contact: Tracy Scott, Director of Energy Programs

Program Support Groups

General Management

The general management group represents the executive, legal, financial, human resources, innovation and development, project management, facility operations, board services and organizational development functions at Energy Trust. It provides leadership to support Energy Trust's strategic goals and operations.

2023 Context

In addition to overall market context in the Executive Summary, we are responding to the following conditions and drivers:

- The evolving COVID-19 pandemic will continue to impact our business model.
- Federal legislation and associated funding could be used in conjunction with our ratepayer funding to complement our savings and generation efforts.
- Energy efficiency and renewable generation is an increasingly important tool to support state and regulatory policies like decarbonization, net peak management and social and environmental justice concerns. These factors contribute to the growing demands on staffing resources.

2023 Significant New Activities

- Realize the benefits of previous organizational development actives, including improvements to the annual planning and budgeting process, re-structuring internal teams for current and future conditions, fostering innovation, applying best practices in change management and more broadly adopting decision making and prioritization tools through staff training, reinforcement and internal consulting.
- Under the direction of a new Innovation and Development team, cultivate strategic partnerships and pursue new funding opportunities that are aligned with organizational priorities. Concurrently establish a sustainable internal structure for the management and administration of new funding opportunities.
- Fully integrate the new organizational supplier diversity program in our procurement processes to encourage greater contracting with firms certified by the Oregon Certification Office for Business Inclusion and Diversity and use the new supplier diversity tracking tool to establish a contracting baseline and goals.
- Implement the career development framework and program developed in 2022 to improve recruitment and retention by providing staff greater clarity on advancement and development opportunities based on skills, behaviors and competences.
- Recruit and onboard additional staff to support decarbonization efforts and increase gas savings, respond to and support DEI initiatives, balance workload across the organization and support employee retention.
- Launch requirements gathering, a request for proposals, vendor selection and contracting for a new Enterprise Financial System to be implemented in 2024, which will modernize our financial information system architecture, increase financial process efficiencies and improve planning and forecasting capabilities.

2024 Expected Changes and New Initiatives

- Enhance employee engagement, productivity and retention through the adoption of and continuous improvement to processes and protocols related to supporting a distributed workforce in a fully flexible environment.
- Explore and establish direction on the status of our lease, occupation of physical office space and future space needs.
- Educate the board of directors on topics relevant to 2025-2029 as they begin the development of our next strategic plan.

Budgeted Expenditures

	2022 Budget	2023 Budget	2024 Projection
Total Expenditures (millions)*	$6.5	$7.9	$8.4

**Expenditure detail is provided under budget details tab in the budget binder. Costs shown in the tables may be represented on more than one action plan and, if added together, will not match the total expenditures listed on the financial statements.*

Diversity, Equity and Inclusion (DEI)

Energy Trust's DEI services team supports organization-wide efforts to promote diversity, equity and inclusion. In 2022, we adopted a new Diversity, Equity and Inclusion Plan with a greater focus on community engagement. Implementing this will require more staff training, development and learning opportunities to support cultural awareness and prepare staff to more effectively engage diverse communities. To develop trusting relationships with our customers, we must build the capability of staff to approach and pursue these relationships in ways that demonstrate our commitment and supports engagement in clean energy solutions.

The information and budget figures provided below are not a comprehensive accounting of all diversity, equity and inclusion activities or investments. Program and support group activities implemented throughout the organization are integrated into program and support group action plans and are not called out separately in this budget. This action plan builds on past successes including the completion of the supplier diversity initiative and the implementation of a supplier diversity tracking system.

2023 Context

In addition to overall market context in the Executive Summary, we are responding to the following conditions and drivers:

- There is a growing awareness and urgency of the need to remedy past harms to customers that have been historically underserved by our programs. This is reflected in changing priorities of the OPUC, utilities and program management contractors. Our DEI services team is increasingly being called on to provide support and guidance to staff and stakeholders.
- Policymakers, communities and environmental advocates are increasingly viewing energy efficiency as a significant tool to achieve decarbonization in response to environmental and climate justice issues. As Energy Trust explores our role in decarbonization, our DEI services team must be able to support this effort.

2023 Significant New Activities

- Enhance the role of the Diversity Advisory Committee by empowering members to be more involved in organizational and program projects, improve member recruitment and retention and create pathways for members to engage other advisory councils and board members.
- Manage diverse spending goals with companies certified by the Oregon Certification Office for Business Inclusion and Diversity and support contract manager compliance with our supplier diversity program.
- Provide training and development opportunities for staff and board members to help navigate complex issues of diversity, equity and inclusion so they can build trusting relationships with customers we have historically underserved.

2024 Expected Changes and New Initiatives

- Host community and stakeholder engagements that meet mutual objectives of Energy Trust and our partners, promote our programs, encourage participation by customers we have historically underserved and result in co-created programs and opportunities.
- Continue to demonstrate leadership in awareness of how language and actions can perpetuate historical harms and impact the trust our communities place in us.

Budgeted Expenditures and Savings

	2022 Budget	2023 Budget	2024 Projection
Total Expenditures (millions)* DEI action plan activities only	$0.3	$0.4	$0.5
Estimated Expenditures (millions) – Organization-wide activities, delivery and incentives associated with DEI goals**	$46.4	$41.7	Not currently estimated

** Costs shown in the tables may be represented on more than one action plan and, if added together, will not match the total expenditures listed on the financial statements.*

***This is a conservative estimate of total expenditures in programs, support groups and general management associated with organization-wide efforts to expand participation of customers we have historically underserved and BIPOC- and women-owned contractors and accomplish other DEI Plan goals. The estimate is provided here for reference only. The activities and expenditures are embedded in program, support group and general management action plans and associated budgets.*

General Marketing, Communications and Customer Service

The marketing and communications team creates and strengthens customer and stakeholder awareness of Energy Trust. Communications staff produces organizational communications and public relations content that informs stakeholders and the public of the value of clean energy and Energy Trust's activities, demonstrate transparency and accountability through public reporting and responding to requests for information, supports staff engagement through internal communications and communicates progress toward diversity, equity and inclusion objectives. Marketing and creative services expand customer access to information and incentives through management of our website, social media, forms and translation services and expand the organization's reach to new customers through brand campaigns and the production of materials supporting targeted outreach. The customer service and trade ally team supports a consistent, positive customer experience through customer service channels and ensures contractor access to offers, training and customer leads with a focus on greater engagement with contractors of color and women contractors. Staff manage Energy Trust's contracted customer call center, including complaint resolution and quality control standards. Trade Ally Network support includes enrollment, business development fund processing, trade ally benefits and resources, online tools.

2023 Context

In addition to overall market context in the Executive Summary, we are responding to the following conditions and drivers:

- In-person outreach will continue to accelerate following the COVID-19 pandemic, coupled with an overall increase in outreach activities and community relationship building, requiring print collateral and other customized marketing and communications support.
- As utility partners respond to requirements around decarbonization and energy advocacy groups increase their interest in Energy Trust activities, new strategies and content will need to be developed to give customers broader information on equipment choice options regardless of existing fuel source through existing channels.
- A new budget process resulting from HB 3141 requires additional communications resources to support expanded utility coordination and additional stakeholder engagement.
- The expansion of innovation and development functions in the organization will create new and more complex reporting obligations.

2023 Significant New Activities

- Adapt and expand reporting products and processes to include new funding sources through contracts and grants. In collaboration with Planning and Evaluation, expand reporting to include carbon benefits and peak savings.
- Develop a new diversity, equity and inclusion resource to help staff and PMCs select language for written and verbal communications, marketing and outreach. The guide will be co-created with subject matter experts from the diverse communities and cultures Energy Trust serves.
- Expand diversity, equity and inclusion website to add dynamic, engaging content and reporting about Energy Trust's DEI approach, plan and progress.
- Redesign website content and navigation and online and print collateral to make it easier for customers, stakeholders and potential funders to understand what Energy Trust is, what we do and our impact.
- Enhance the website audience user experience for commercial customers, homepage visitors and customers seeking information related to fuel choice. Prepare the organization for a transition to Google's new tracking platform GA4, enabling effective targeting and action on campaign landing pages.
- Implement a new Brand Marketing Plan that expands marketing support for community-based outreach events and relationships and integrates and aligns brand public relations, social media and advertising activities under a strategy to increase awareness and trust with priority audiences. Execute advertising that continues the 2022 focus on reaching communities of color, Spanish speakers and rural residents.
- Implement a translation and interpretation services pool to help the organization engage customers and communities whose first language is not English.

- Launch Trade Ally Small Business Resource Network to expand participation of rural and minority- and women-owned contractors. This is a suite of service providers that trade allies can tap for marketing consultation, guidance for putting together a bid or estimate, COBID certification and other business development assistance. This work supports Energy Trust's launch of a peer contractor mentoring program in the Residential and Existing Buildings programs in 2023.

2024 Expected Changes and New Initiatives

- Continue to evolve reporting products and processes to represent new activities, partnerships and funders. Move toward on-demand reporting tools and evaluate and redesign public annual reports.

Budgeted Expenditures

Total Expenditures (millions)*	2022 Budget	2023 Budget	2024 Projection
General Marketing and Communications	$2.8	$2.9	$3.0
Customer Service/Trade Ally	$0.9	$1.2	$1.1

**Expenditure detail is provided under budget details tab in the budget binder. Costs shown in the tables may be represented on more than one action plan and, if added together, will not match the total expenditures listed on the financial statements.*

Outreach and Policy Services

Outreach and policy services staff provide resources to serve and engage customers, communities, stakeholders and policymakers across the state, with staff based in Southern Oregon, Eastern Oregon and the Portland area. The team supports the organization in reaching all utility customers, especially communities of color, customers with low incomes and people living in rural areas. Staff provide customers with general clean energy information, opportunities to receive technical support and incentives, support for accessing clean energy rebuilding solutions in the aftermath of natural disasters, and connections to local organizations and contractors that can serve them.

Within our non-advocacy role, staff serve as a resource for policymakers, implementers and stakeholders working at local, state and national levels by monitoring policy discussions and providing objective information and technical analysis to deliver energy efficiency, renewable energy, resiliency and related benefits. This includes providing information about how energy efficiency and renewable energy can contribute to efforts to reduce greenhouse gas emissions, lower customer energy burdens, improve health outcomes, improve access to efficient heating and cooling opportunities for environmental justice communities, and lead to community resiliency opportunities.

The community services budget provides resources to work with community-based organizations and communities to expand customer participation in energy efficiency and renewable energy programs and design approaches to reach new customers. Resources and grants focus on increasing engagement with communities of color, rural communities and customers with low incomes. Additionally, staff coordinate with communities to support the creation and implementation of community-specific energy, sustainability and resiliency plans while helping identify energy efficiency and renewable energy opportunities within those plans.

2023 Context

In addition to overall market context in the Executive Summary, we are responding to the following conditions and drivers:

- Community-based organizations and municipalities will be more interested in ensuring energy programs and services are accessible in their communities and building local capacity, policies and delivery mechanisms to meet community needs.
- Staff expect more frequent and varied requests for information will be driven by Oregon's legislative session and as utilities plan to meet their near-term greenhouse gas emissions reductions requirements. Additionally, discussions are expected regarding Energy Trust's role or possible coordination with new federal funding opportunities.
- State agencies, utilities and Energy Trust will increase focus on convening and gathering input from diverse community members and stakeholders requiring systems/processes for coordination and information sharing related to stakeholder engagement on energy/building decarbonization, equity and community engagement.

2023 Significant New Activities

- Design an approach to convene community-based organizations as a cohort to respond to interest in information and training on energy and Energy Trust programs and services.
- Modify a small grant offer that helps community-based nonprofit organizations advance ideas, develop projects or deepen their knowledge of energy efficiency and renewable energy.
- With more Resource Assistance for Rural Environments (RARE) AmeriCorps members placed in Oregon communities and focused on energy and resilience, bring additional resources and information regarding Energy Trust programs and services to the members through training and conferences.
- With the development of a Communities and New Initiatives team in programs, bring expertise and community insights into the design and development of community specific offers and joint initiatives around workforce and capacity building with community-based organizations.
- Design an approach, in alignment with programs, to convene community-based organizations as a cohort to respond to interest in information and training on energy and Energy Trust programs and services.
- Increase presence with communities of color and rural communities through events, sponsorships and memberships where Energy Trust can share information on programs and services. Increase use of translators and interpreters to better support in-language engagement at events.

- Conduct more comprehensive outreach to tribal governments guided by an outreach plan developed with a tribal member working group. Increase presence at tribal events and through memberships and sponsorships.
- Serve as point of contact for the increasing number of communities developing and implementing energy or other planning efforts and work with program staff exploring turnkey approaches to community energy planning similar to existing Strategic Energy Management offer.
- As part of early budget engagement and action planning, engage stakeholders with objective information on Energy Trust programs and convey information to staff on stakeholder areas of interest in program opportunities.
- Continue to develop the policy services team's expertise and systems to inform policymakers, implementers and stakeholders of Energy Trust programs, capabilities and impacts, and meet the needs of staff and the board operating in an expanded and dynamic policy landscape.
- Monitor and respond to information requests of policymakers, elected leaders and stakeholders during the 2023 state legislative session, any continuing activity of the 2022 Task Force on Resilient, Efficient Buildings, OPUC dockets regarding utility planning, programs and Energy Trust operations and related utility forums.

2024 Expected Changes and New Initiatives

- Based on learnings and outreach in 2023, determine if there are gaps in service to Oregon tribal members and governments and consider whether additional capacity is needed to address gaps.
- With two years of experience releasing small grants to nonprofit organizations, evaluate impact and execute changes to small grant program to expand its ability to deliver capacity to nonprofits resulting customer benefit.
- Develop and implement a strategy to increase participation in rural communities.
- Assess the policy services team for any gaps in technical skills or knowledge, including policy analysis areas related to any new laws or regulations enacted in 2023.
- Based on lessons and feedback in 2023, revise the early budget engagement approach with community-specific events or forums across the state and with customer groups underserved by Energy Trust.

Budgeted Expenditures

Total Expenditures (millions)*	2022 Budget	2023 Budget	2024 Projection
Outreach and Policy Services	$1.3	$1.5	$1.9
Community Services	$0.5	$0.6	$0.7

**Expenditure detail is provided under budget details tab in the budget binder. Costs shown in the tables may be represented on more than one action plan and, if added together, will not match the total expenditures listed on the financial statements.*

Existing Buildings Program

The Existing Buildings program serves existing commercial buildings and existing multifamily properties with incentives, tools, training and technical assistance for customers who complete energy-efficiency projects and implement behavioral and operational improvements. Existing Buildings serves customers through three primary delivery tracks: standard incentives for equipment that is installed by a contractor or sold through a vendor; custom incentives for system upgrades that are based on technical studies to estimate energy savings; and energy performance management incentives for whole-building energy savings gained through improvements to building operations and maintenance practices.

2023 Context

In addition to overall market context in the Executive Summary, we are responding to the following conditions and drivers:

- Market trends are unpredictable in several areas, such as the move from brick-and-mortar retail shops to online selling and in offices where variable occupancy levels are causing owners to hold off on energy-efficiency upgrades.
- Customers are choosing electrification, and climate action plans are requiring local governments and schools to shift away from natural gas.

2023 Significant New Activities

- Conduct focused research and development to address the needs of expiring measures, support small businesses, adapt to code changes, develop new ways of identifying savings opportunities with customers, and research the ability to develop packages of measures tailored to specific market segments.
- Expand support for small businesses and Black, Indigenous, people of color and rural customers through marketing, community engagement, a refreshed contractor development pathway and a redesigned small business offer that includes lighting and non-lighting measures.
- Act on recommendations from the program's equity assessment in 2022 and apply equity lens to all program offers.
- Streamline the customer experience and achieve savings through retrocommissioning enhancements, development of a process for technical assistance studies for small business custom projects and transitioning downstream lighting into the Existing Buildings program.
- Increase information about offers in other languages through program marketing collateral, customer forms and outreach interactions.
- Expand Energy Performance Management offers by launching a full-scale pay for performance offer and adding three new Strategic Energy Management cohorts. Transition Strategic Energy Management models to a new energy performance platform to streamline program delivery costs and simplify the customer experience.
- Promote workforce development with energy savings opportunities by funding internships, apprenticeships and educational opportunities.
- Expand Community Partner Funding to provide higher incentives to small multifamily and small commercial customers delivered through partnerships with community-based organizations.
- With Residential, support the development of a pilot to evaluate the benefits of heat pump systems installed in gas heated homes through a cost-effectiveness exception. Transition the pilot to an offer focused on energy burdened customers.

2024 Expected Changes and New Initiatives

- Seek out additional funding sources to support customer energy upgrades.

Budgeted Expenditures and Savings

	2022 Budget	*2023 Budget*	2024 Projection
Total Expenditures (millions)*	$64.9	$71.2	$77.1
Gas Savings (therms)	2,469,687	2,109,310	2,462,389
Electric Savings (aMW)	15.3	12.2	13.0
Carbon Dioxide Avoided (metric tons)**		56,000	

** Expenditures above and in the budget details tab include lighting costs. See the Commercial and Industrial Lighting Offers action plan for a breakout of lighting costs only. Costs shown in the tables may be represented on more than one action plan and, if added together, will not match the total expenditures listed on the financial statements.*
*** The carbon savings forecast for 2023 is based on the measure mix from the most recently completed 2021 year. Results will vary based on actual measure mix in 2023.*

New Buildings Program

The New Buildings program supports design and construction of high-performance commercial buildings and major renovations of all sizes and building types. Staff engage early in the design process with building owners, developers and design professionals to influence decisions that maximize efficiency through standard incentives, Market Solutions incentive packages and custom, whole-building incentives. Market Solutions incentives help businesses make decisions with pre-packaged options to achieve deeper energy savings over individual standard incentives. Whole-building incentives support the use of energy modeling to consider integrated design and systems to achieve efficiencies significantly beyond code. Additionally, the program invests in market transformation activities that include training, education and grants.

2023 Context

In addition to overall market context in the Executive Summary, we are responding to the following conditions and drivers:

- Whole building projects remain under the OPUC exception for measure-level Total Resource Cost through 2023.
- Supply chain delays impact new construction significantly, as a delay for one contractor can have a domino effect on subsequent contractors engaged in the project.
- Code updates will continue at a fast pace, with the recent 2021 update soon to be replaced with ASHRAE 90.1-2023.
- Some projects are compressing design and development timelines to reduce labor costs, reducing the timeframe to explore deep energy savings opportunities.

2023 Significant New Activities

- Test strategies for a program design that aligns with ASHRAE 90.1-2023 and achieves the OPUC's requirements for cost-effectiveness.
- Expand access to energy modeling by developing a pool of modelers certified by the Oregon Certification Office for Business Inclusion and Diversity and supporting up to 10 projects through this contract pool.
- Expand training and education content to include cost implications and decision-making for energy-efficient technology and design.
- Develop network of subject matter experts for training and education with a focus on women and people of color.
- Explore new strategies to expand outreach efforts across the region to engage more customers in rural areas.
- Expand recruitment of Net Zero Fellows to a national level and increase promotion and application of fellowship research findings.

2024 Expected Changes and New Initiatives

- Scale up training and education that incorporates cost implications and decision-making for energy-efficient technology and design and expanded network of subject matter experts.
- Using lessons from a 2023 test of simplified modeling performed by a pool of energy modelers, expand access to simplified energy modeling for buildings without the resources to have an energy modeler on their design team.
- Leverage federal funding and relationships with other market actors to expand resilience and carbon reduction related work.
- Test incentives for building design and technologies that deliver both efficiency and demand response benefits.

Budgeted Expenditures and Savings

	2022 Budget	2023 Budget	2024 Projection
Total Expenditures (millions)*	$19.4	$18.6	$19.4
Gas Savings (therms)	437,460	336,822	391,228
Electric Savings (aMW)	4.8	7.9	5.0
Carbon Dioxide Avoided (metric tons)**		31,000	

**Expenditure detail is provided under budget details tab in the budget binder. Costs shown in the tables may be represented on more than one action plan and, if added together, will not match the total expenditures listed on the financial statements.*
*** The carbon savings forecast for 2023 is based on the measure mix from the most recently completed 2021 year. Results will vary based on actual measure mix in 2023.*

Commercial and Industrial Lighting Offers

Energy Trust delivers lighting offers to commercial and industrial businesses through a single Program Delivery Contractor. In 2023, business lighting will have three delivery offers:

- Midstream: Incentives for energy-efficient lighting products that are provided at point of purchase through a participating lighting distributor.
- Trade ally-delivered lighting upgrades: Incentives for prescriptive and custom measures that are not included in the midstream offer. These projects generate the largest part of program savings.
- Direct installation of no-cost lighting: Lighting upgrades for small and medium businesses and multifamily properties provided at no cost to the customer.

2023 Context

In addition to overall market context in the Executive Summary, we are responding to the following conditions and drivers:

- The program forecasts lighting savings will decline over the next few years with the implementation of new federal standards and lighting baselines increasing.

2023 Significant New Activities

- Provide stability and support to the market by maintaining measures and program caps and increasing incentives where possible and within cost-effective delivery.
- Focus on recruiting midstream distributors and maximizing participation with current distributors to provide greater availability of offers across the state.
- Expand trade ally education on the benefits of controls to encourage implementation of lighting; add controls measures to the midstream offer.
- Explore an offer to support early design engagement for large retrofit projects.
- Collaborate with Existing Buildings and Production Efficiency programs to refresh the small business no-cost lighting offer to achieve a more customer-centered approach, especially for businesses within communities of color and in low-income and rural areas.
- Build on 2022 community-led efforts to promote the no-cost lighting offer to small businesses in rural communities.
- Transition the delivery of the small business no-cost lighting offer into Existing Buildings in 2023 and prepare to transition the offer into the Production Efficiency program in 2024.

2024 Expected Changes and New Initiatives

- Transition the delivery of the downstream customer-facing offer into Existing Buildings and Production Efficiency programs in 2024.

Budgeted Expenditures and Savings

	2022 Budget	2023 Budget	2024 Projection
Total Expenditures (millions)*	$21.9	$20.8	$23.0
Electric Savings (aMW)	14.2	8.8	9.9

**Expenditure detail is provided under budget details tab in the budget binder, included in Existing Buildings and Industry and Agriculture programs. This detail includes lighting incentives for 2022, and lighting incentives and delivery for 2023 and 2024. Costs shown in the tables may be represented on more than one action plan and, if added together, will not match the total expenditures listed on the financial statements.*

Southwest Washington Commercial Program

Energy Trust provides incentives and technical support to business customers in Southwest Washington on qualifying NW Natural commercial firm or interruptible rate schedules. Offers include incentives for energy-efficient equipment purchased through trade allies or vendors, incentives for operations and maintenance improvements, and no-cost technical studies to estimate energy savings and incentives for retrocommissioning. The program also provides incentives for the Building Operator Certification course. Projects include upgrades and retrofits at existing commercial buildings, energy-efficient equipment for new construction, energy-efficient equipment and retrofits at existing and new multifamily properties with two or more units, and upgrades for natural gas-heated production greenhouses.

2023 Context

In addition to overall market context in the Executive Summary, we are responding to the following conditions and drivers:

- Two of the most installed measures in Southwest Washington have expired (gas fryers) or are on the bubble for cost-effectiveness (condensing boilers).

2023 Significant New Activities

- Boost marketing activities to drive interest in available measures and promote bonuses when available through appropriate marketing channels and outreach.
- Create more in-person and online trade ally engagement opportunities to build stronger relationships with contractors.
- Increase community engagement to better reach customers new to energy efficiency.
- Increase in-person events in line with pandemic restrictions including with organizations such as local chambers, Vancouver Business Journal, Downtown Vancouver Business Improvement Association and Columbia River Economic Development Council.
- Expand collaborative customer engagement activities with Clark Public Utilities for Strategic Energy Management recruitment, technical analysis studies and lead generation.

2024 Expected Changes and New Initiatives

- New commercial construction program incentives will sunset in 2024 based on new Washington State Energy Code.

Budgeted Expenditures and Savings

	2022 Budget	2023 Budget	2024 Projection
Total Expenditures (millions)*	$1.4	$1.6	$1.6
Gas Savings (therms)	185,694	169,245	162,296
Carbon Dioxide Avoided (metric tons)**		900	

** Expenditure detail is provided under budget details tab in the budget binder. Costs shown in the tables may be represented on more than one action plan and, if added together, will not match the total expenditures listed on the financial statements.*
*** The carbon savings forecast for 2023 is based on the measure mix from the most recently completed 2021 year. Results will vary based on actual measure mix in 2023.*

Production Efficiency Program

The Production Efficiency program provides energy-efficiency solutions for all sizes and types of eligible industrial, agricultural, municipal water and wastewater customers. In 2023, one Program Management Contractor will manage and deliver all offers, including standard track incentives for equipment delivered through trade allies and vendors, custom track incentives for projects that require technical studies to estimate energy savings, and energy performance management for Strategic Energy Management engagements and other offers that help customers build their internal capacity to save energy.

2023 Context

In addition to overall market context in the Executive Summary, we are responding to the following conditions and drivers:

- A PMC will manage the program including the standard, custom and Strategic Energy Management tracks, replacing the current structure of five PDCs delivering various aspects of the program. This change in program management structure was made to improve customer and trade ally experience and streamline program and contract management.

2023 Significant New Activities

- Implement PMC structure with account managers, providing streamlined experience for customers. Effectively transition customer and trade ally relationships from the incumbent to the new PMC.
- Increase gas incentives to build a pipeline of project for increased savings in 2024 when we anticipate supply chain issues and labor shortages will ease.
- Expand new operations and maintenance offer to create a more streamlined process for customers.
- Launch new energy performance platform for Strategic Energy Management to streamline program delivery and simplify the customer experience.
- Support PGE and Pacific Power demand response programs by recommending leads to irrigation load control and industrial curtailment programs.
- Develop a small business offering for industrial customers to launch in 2024.
- Establish a diversity, equity and inclusion council within the PMC team to guide program design using an equity lens. The council will hold the team accountable for addressing unconscious biases and avoiding unintended design impacts for customers and communities.
- Explore new approaches to reach small industrial businesses in rural areas and/or that are BIPOC/woman owned, including developing relationships with community-based organizations, providing information about other available funding sources, conducting targeted outreach and a launching multilingual outreach team.
- Engage, recruit and support businesses owned by contractors of color to participate in the Production Efficiency program. The PMC will partner with National Association of Minority Contractors to help contractors of color leverage the program to grow their businesses.
- Refine how we collect and use demographic/firmographic information to reach businesses owned by people of color and women.

2024 Expected Changes and New Initiatives

- Launch new small business direct installation offering for industrial customers.
- Transition delivery of the downstream lighting customer-facing offering into the Production Efficiency program
- Consider increasing electric incentives to achieve more electric savings.
- Develop a Contractor Development Pathway to provide workforce development opportunities for diverse industrial trade allies.

Budgeted Expenditures and Savings

	2022 Budget	2023 Budget	2024 Projection
Total Expenditures (millions)*	$43.3	$41.6	$51.7
Gas Savings (therms)	1,528,067	1,279,515	1,529,470
Electric Savings (aMW)	17.0	13.7	16.0
Carbon Dioxide Avoided (metric tons)**		57,000	

** Expenditures above and in the budget details tab include lighting costs. See the Commercial and Industrial Lighting Offers action plan for a breakout of lighting costs only. Costs shown in the tables may be represented on more than one action plan and, if added together, will not match the total expenditures listed on the financial statements.*

*** The carbon savings forecast for 2023 is based on the measure mix from the most recently completed 2021 year. Results will vary based on actual measure mix in 2023.*

Residential Program

The Residential program provides electric and gas energy-efficiency solutions for owners and renters living in single-family, manufactured and newly constructed homes. In 2023, the program will be delivered by a Program Management Contractor (PMC) and two Program Delivery Contractors (PDC) supporting midstream promotions and EPS™ new construction offers. Incentives are available for smart thermostats, energy-efficient HVAC and water heating equipment, lighting, appliances, weatherization upgrades and whole-home improvements in new construction.

2023 Context

In addition to overall market context noted in the Executive Summary, we are responding to the following conditions and drivers:

- Increased interest in cooling solutions is driving continued demand for comfort and efficiency improvements impacting HVAC and weatherization activity.
- Strong demand for new home construction is expected to continue, driven by housing shortages and high rents.
- Communities are driving demand for displacing electric resistance heat and reducing carbon emissions, which creates new opportunities to reach underserved customers with heat pump installations.

2023 Significant New Activities

- Contract with new PMC and PDC program implementation teams. These contracts include a significant increase in the role of diverse subcontractors in program delivery.
- Increase contractor capacity to deliver HVAC and insulation improvements across the service area through training and marketing support.
- Recruit and increase participation of minority-owned, women-owned and emerging small businesses in the Trade Ally Network.
- Support energy education and do-it-yourself participation pathways with online resources that connect customers with retail and online offers.
- Maximize incentive levels and promotion of HVAC and insulation improvements, with focused offers for customer groups underserved by Energy Trust.
- Develop a pilot to evaluate the benefits of heat pump systems installed with gas furnaces in existing gas heated homes through a cost-effectiveness exception. Transition the pilot to an offer focused on energy burdened customers pending pilot findings.
- Engage with gas utilities to explore ways to expand the reach of their low-income programs.
- Coordinate with state and federally funded programs to align resources to make it easy for customers and contractors to access multiple funding sources.
- Redesign efficient window offers to reach customers with the most inefficient products through community partnerships and highlight non-energy benefits of window replacement for all customers.
- Develop the EPS™ New Construction baseline, pathways and requirements in response to the 2023 Oregon Residential Specialty Code update.
- Redesign program to deliver discounted heat pumps to customers with electric furnaces in existing manufactured homes.
- Expand the no-cost ductless heat pump pilot to include direct installation of ductless and ducted heat pumps that benefit customers with low to moderate incomes (including renters) living in homes with electric resistance heating sources.

2024 Expected Changes and New Initiatives

- Build demand for wall and floor insulation.
- Identify additional opportunities to align offers with state and federally funded programs.
- Implement a revised EPS delivery model to reflect program adjustments in response to the 2023 Oregon Residential Specialty Code update.

Budgeted Expenditures and Savings

	2022 Budget	2023 Budget	2024 Projection
Total Expenditures (millions)*	$56.2	$59.7	$63.4
Gas Savings (therms)	2,662,335	2,321,949	2,606,898
Electric Savings (aMW)	7.5	4.7	5.0
Carbon Dioxide Avoided (metric tons)**		30,000	

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*** The carbon savings forecast for 2023 is based on the measure mix from the most recently completed 2021 year. Results will vary based on actual measure mix in 2023.*

Southwest Washington Residential Program

Energy Trust helps single-family homeowners and small multifamily property owners served by NW Natural in Southwest Washington save energy through cash incentives for efficient space heating and controls, smart thermostats, water heating, insulation, windows and behavioral actions and education. Energy Trust also offers trade ally support, financing with repayment through utility bills and market interventions. The program influences new residential construction by engaging with builders to increase energy efficiency of new homes through incentives, education, trade and program ally support and quality assurance. This work ensures NW Natural has all the needed information requested by the Washington Utilities and Transportation Commissions.

2023 Context

In addition to overall market context in the Executive Summary, we are responding to the following conditions and drivers:

- 2023 is the second year of a two-year goal.
- The single-family rental and small multifamily markets in Southwest Washington remain strong with year-over-year increases in participation, particularly where incentives are higher for property ownership groups.
- The program did not implement any bonus incentives in 2022 except for bonuses for rental property owners.
- New home program activity will decline in 2023 with changes to the 2018 Washington State Energy Code.

2023 Significant New Activities

- Expand collaborations with community-based organization to bring capital measures to new customer segments through Community Partner Funding. Community Partner Funding offers increased incentives through community-based organizations to support programs for customers Energy Trust has underserved who are living in detached single-family homes.
- Explore coordination opportunities with Clark Public Utilities on increased incentive distribution to populations we have underserved through the Community Partner Funding program and revitalize in-person events such as events with Planet Clark, the Building Industry Association, Clark County Rental Association and other entities.
- Increase participation in smart thermostat measures by expanding the thermostat qualified products list, increasing downstream incentive opportunities and implementing distributor incentive pathways.
- Redesign efficient window offers to reach customers with the most inefficient products through community partnerships and highlight non-energy benefits of window replacement for all customers.
- Coordinate with NW Natural to research opportunities to implement a residential behavioral program for single-family homeowners in Washington.

2024 Expected Changes and New Initiatives

- EPS™ new construction measures will not be available for new homes in 2024 based on changes to the Washington State Energy Code.

Budgeted Expenditures and Savings

	2022 Budget	2023 Budget	2024 Projection
Total Expenditures (millions)*	$1.6	$1.7	$1.7
Gas Savings (therms)	133,073	112,663	112,575
Carbon Dioxide Avoided (metric tons)**		600	

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*** The carbon savings forecast for 2023 is based on the measure mix from the most recently completed 2021 year. Results will vary based on actual measure mix in 2023.*

Northwest Energy Efficiency Alliance

Energy Trust has worked with the Northwest Energy Efficiency Alliance (NEEA) since 2002 to increase the availability and adoption of energy-efficient electric products, services and practices. In 2015, natural gas equipment was added. By pooling resources at a regional level to work with manufacturers, distributors and retailers, NEEA accelerates the development, testing and distribution of new energy-saving equipment and approaches. NEEA identifies and refines new high-efficiency products, services and practices and helps bring them to market. Once products are available, Energy Trust creates and implements programs to support broad market adoption in Oregon.

NEEA produced its 2023 forecast of savings after we published our draft budget, so savings estimates in the draft budget were based on projections of savings that were developed by NEEA in 2021. The final proposed budget includes NEEA's detailed forecast for 2023. Because of this schedule, there are changes in savings from draft to final proposed budgets.

2023 Significant New Activities

- Accelerate the adoption of high-performing windows that reach 0.22 U value or lower through increased builder demand, scaled production by leading manufacturers and an advancement in ENERGY STAR® window specification criteria. Technological advances in thin glass production, a pending update to ENERGY STAR specification, and additional builder and policy drivers provide leverage points to help NEEA accelerate the market.
- Through NEEA's Retail Products Portfolio initiative, utilize midstream incentives to influence the purchasing decisions of corporate retail builders, leverage sales data to identify promising opportunities for energy efficiency and influence increasingly stringent ENERGY STAR specifications or federal standard updates. Use retailer online sales data to build market knowledge and expand regional market data.
- Increase awareness, stocking and sales of efficient motor-driven products, focusing on pumps and fans. Support procurement practices and standards to drive adoption of more efficient motor-driven products with integrated controls. Engage with distributors to test and refine market interventions for efficient pumps and circulators.
- Continue to encourage market adoption of residential variable speed heat pumps, high performance HVAC and efficient (gas) rooftop units. Continue to study and develop gas opportunities for HVAC and gas heat pumps and dual fuel (hybrid) opportunities for the residential market. Regularly develop HVAC market and product insights based on regional stock, sales and permit data, in combination with additional data sets.
- Increase supply chain engagement and adoption of luminaire level lighting controls (LLLC) in the region through partnerships, training and building awareness with early adopters. Influence leading specifiers who focus on key target markets to include LLLC in their ongoing business practices. Continue to research the adoption and market.
- Participate in current DOE rulemaking process for the federal consumer water heating standard. Work upstream with water heater manufacturers to influence product development. Focus on supply chain engagement to drive demand in the Northwest, including supporting installers to grow acceptance and confidence in the technology.
- Provide and enhance common resources for regional research and data, including the residential and multifamily building stock assessment and end use load research, which provide updated building characteristics, baseline conditions and load and savings shapes to funders.

Budgeted Expenditures and Savings

	2022 Budget	2023 Budget	2024 Projection
Total Expenditures (millions)*	$9.0	$8.1	$8.2
Gas Savings (therms)	167,873	1,748	64,981
Electric Savings (aMW)	6.0	6.6	7.8
Carbon Dioxide Avoided (metric tons)**		24,000	

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Solar Program

The Solar program aims to create a vigorous and sustainable market for solar and battery storage in Oregon with a focus on systems that reduce energy burdens for customers, support community energy resilience and create a flexible grid resource. The program provides incentives to reduce the cost of developing and installing solar and solar+storage systems with prescriptive incentives, including income-qualified incentives for customers experiencing low to moderate incomes, and more focused customized offers. In addition to project incentives, the solar program addresses market barriers to solar and solar+storage by providing consumer education, customer support and marketing; partnering with community-based organizations to reach customers that Energy Trust has underserved; maintaining quality standards and verification of systems; managing a network of vetted solar trade ally contractors; leading initiatives to drive down non-equipment soft costs of solar; driving solar workforce development efforts to increase diversity and access to solar jobs; and informing active Oregon Public Utility Commission dockets, utility planning processes and building codes updates.

2023 Context

In addition to overall market context in the Executive Summary, we are responding to the following conditions and drivers:

- Despite project delays and cost increases, solar activity remains strong with high customer interest and expanded federal, state and local funding sources.
- The federal Infrastructure, Investment and Jobs Act provides direct funding to the state and creates opportunities for coordination with public entities, utilities, Oregon Department of Energy and communities to achieve energy resilience goals.
- The Inflation Reduction Act expands funding for solar and storage systems and creates pathways for nonprofits, public entities and tribes to receive tax credits.
- The OPUC may adopt updated standards for net metering interconnection and smart inverters through docket UM 2111.
- Energy Trust continues to transition its focus as required by House Bill 3141, including:
    - Investing at least 25% of renewable energy funds to benefit customers experiencing low or moderate incomes.
    - Supporting “distribution-system connected technologies that support the reliability, resilience, and the integration of renewable energy resources,” preliminarily defined by the OPUC as smart inverters and smart battery energy storage systems.
    - Reducing standard solar incentives to shift funding to these new opportunities.

2023 Significant New Activities

- Explore and implement new offers with higher incentives to increase access for customers experiencing low incomes and meet the 25% low- and moderate-income requirement.
- Develop program capacity to focus offers on specific geographic locations and environmental justice communities in support of program diversity, equity and inclusion goals, community energy resilience, community-led energy planning and/or utility non-wire solution efforts.
- Deploy incentives for battery storage systems. Co-develop with utilities and OPUC, in alignment with HB 3141 and UM 2111, more comprehensive requirements that leverage the capabilities of renewable energy systems to stack value for customer bill savings, community energy resilience and utility grid services.
- Support development of the Community Supported Renewables (green tariff) provision of HB 2021 in collaboration with utilities and public entities.
- Expand coordination with energy efficiency programs to integrate solar+storage and co-develop grid-interactive efficient building offers that support technologies that provide resilience, reliability and grid services.

- Leverage Federal Emergency Management Agency grant funding to develop offers that support prioritization, planning, funding and installation of renewable energy microgrids at community resilience hubs. Collaborate with utilities to co-develop a process for supporting communities interested in energy resilience projects.

2024 Expected Changes and New Initiatives

- Deploy prescriptive community energy resilience offers.
- Scale-up and add requirements to smart inverter and smart battery storage offers.
- Explore with OPUC and stakeholders additional technologies that may be included in the definition of distribution system connected technologies under HB 3141 and the role for Energy Trust in their deployment.

Budgeted Expenditures and Generation

	2022 Budget	2023 Budget	2024 Projection
Total Expenditures (millions)*	$16.1	$17.4	$17.7
Generation (aMW)	4.0	5.4	4.0
Carbon Dioxide Avoided (metric tons)**		15,000	

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Other Renewables Program

The Other Renewables program supports a portfolio of renewable energy projects up to 20 megawatts that generate electricity using biopower, hydropower, geothermal and community-scale, municipally owned wind technologies. Given market conditions, there is an economic preference for in-conduit hydropower and biogas to electricity projects. The program supports electric utility customers with custom project development assistance and installation incentives.

Development assistance incentives are used for non-capital costs for studies to determine a project's technical and financial viability, moving it from concept to commercial operation. Qualified projects may access project development assistance incentives multiple times, up to the limits of funding caps, enabling applicants to move through consecutive development activities. Installation incentives are determined through detailed technical and financial review of a project based on its above market cost. All incentives are paid following successful commercial operation or activity completion. The program also funds energy resilience studies and community energy planning.

2023 Context

In addition to overall market context in the Executive Summary, we are responding to the following conditions and drivers:

- Customer interest in hydropower and biomass/biogas projects is high, driven by sustainability and resilience goals and a desire to control energy costs.
- The program is responding to this interest along with interest in municipal carbon reduction goals, irrigation modernization, energy planning, and how governments may use the Community Supported Renewables (green tariff) provision in HB 2021 to develop specific renewable energy resources with community benefits.
- The pace and scale of change in the renewable energy industry and market are increasing.
- Biopower and hydropower projects confront low avoided power prices, making net-metered projects more economically viable than those intending to sell electricity to utilities.
- There is financial support for distributed hydropower and biopower resulting from new state and federal funding.

2023 Significant New Activities

- Engage and support customers, communities, and utilities to identify locations where renewable energy microgrids will increase community energy resilience and provide grid services.
- Support development of the Community Supported Renewables (green tariff) provision of HB 2021 in collaboration with utilities and public entities:
    - Fund an assessment of the revenue needs of a portfolio of four to six conceptual irrigation district in-conduit hydropower projects in the Deschutes basin.
- Provide assistance to customers to identify and leverage renewable energy and energy resilience funding opportunities from federal legislation to help fund renewable energy projects.
- Host a roundtable for state agency hydropower regulatory officials focused on solutions to in-conduit hydropower permitting barriers.
- Produce a compendium of existing and potential distributed hydropower in Oregon.
- Host a technical workshop focused on energy resilience planning for municipal water resource recovery facilities.

Budgeted Expenditures and Generation

	2022 Budget	2023 Budget	2024 Projection
Total Expenditures (millions)*	$6.4	$3.4	$3.5
Generation (aMW)	0.1	0.1	0.2
Carbon Dioxide Avoided (metric tons)**		250	

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Communities and New Initiatives Sector

Energy Trust is establishing a new sector in the program group to focus on community-oriented initiatives that cross multiple efficiency and renewable energy sectors. The communities and new initiatives sector will lead the strategic vision and design of cross-sector strategies and initiatives and develop them to be market ready. This will enable Energy Trust to better engage with and serve communities, pursue new technologies and market channels, and respond to evolving needs of our customers, stakeholders and utility partners. This new sector will:

- Enhance engagement and services to meet community needs, ranging from near-term opportunities to complete energy upgrades in homes and businesses, developing plans to meet longer-term energy needs, responding to the impacts of climate change, and building capacity and resilience.
- Work with utility partners to develop strategies and offers to support complementary utility objectives such as carbon reduction, grid flexibility, non-wires solutions and distribution system planning.
- Lead measure development activities and provide information to all stakeholders, including the OPUC. Ensure research priorities and pilot activities are aligned across programs.

2023 Context

In addition to overall market context in the Executive Summary, we are responding to the following conditions and drivers:

- Advisory councils, stakeholders and customers are asking us to deepen our engagement with communities to better understand their challenges and opportunities.
- Interest is growing from communities and community-based organizations to work with Energy Trust; however, there is not a streamlined way for communities to receive comprehensive services across multiple programs.
- Utility partners need to meet their clean energy targets through human centered planning and targeted deployment of focused offers that provide multiple community benefits, such as carbon reduction, distribution system planning, and community resilience and mitigating the impacts of climate change.

2023 Significant New Activities

- Recruit and onboard new and reassigned staff members for the community and new initiatives team.
- Investigate models to streamline participation across multiple program sectors for communities and organizations seeking comprehensive energy solutions.
- Create a framework to integrate community feedback into program designs, such as exploring the formation of a community-based advisory panel to help integrate equity and community engagement principles across sectors.
- Develop a holistic approach that enables communities and organizations to combine funding from multiple sources to reach their energy-related goals.
- Explore a centralized midstream strategy to pursue deeper energy savings across sectors through retailers, distributors and manufacturers.
- Plan for possible changes to organizational reporting metrics, including benefit-cost ratios, which may require updates to current tools for measure screening and organizational reporting.

2024 Expected Changes and New Initiatives

- Launch new strategies and activities developed in 2023, such as new participation pathways for communities, a community-based advisory panel to provide equity support across programs or a cross-sector midstream approach.
- Staff expects communities and organization will have access to additional funding sources throughout 2023, which may lead to expanding Energy Trust's support for these customers and communities in 2024.

The community and new initiatives sector's actions contribute to energy savings in the residential, commercial, industrial and renewable energy sectors. The sector will not have discrete savings or generation goals.

Contracted and Grant-Funded Initiatives

Energy Trust contracts with governments, utilities and other entities to deliver programs and services that align with our mission, advance our strategic plan focus areas and support our core energy savings and generation work. This action plan summarizes planned activities funded through contracts and grants that are beyond Energy Trust's core electric and gas efficiency and renewable energy programs under our grant agreement with the Oregon Public Utility Commission.

Contracted Initiatives

Landlord-provided Cooling Spaces Initiative

- This initiative provides funding to landlords to install cooling equipment in multifamily property common areas or common buildings in manufactured home parks anywhere in Oregon. Funding comes from the State of Oregon, and Energy Trust administers the initiative under a contract with Oregon Department of Energy.
- Administering this program supports state policy and addresses an urgent customer need for cooling. Focus is on environmental justice communities and heat-vulnerable citizens, in particular seniors, people living with disabilities and people experiencing income barriers.
- Implementation began in 2022 and is expected to conclude by 2024.

Budgeted Revenue

	2022 Budget	2023 Budget	2024 Projection
Total Revenue ($ Million)	$0.00	$0.97	$0.76

PGE Smart Battery Pilot

- This pilot incentivizes the installation and connection of up to 525 residential energy storage batteries in PGE's service area. Energy Trust has a contract with PGE to provide support for customer outreach, contractor training, quality management and incentive processing.
- This pilot complements core Energy Trust offers for solar, supports participating customers with energy resilience and helps PGE learn about the grid benefits and value of smart battery storage. Leveraging Energy Trust's existing infrastructure and expertise makes the project less costly for ratepayers.
- Implementation began in 2020 and is expected to conclude in 2025.

Budgeted Revenue

	2022 Budget	2023 Budget	2024 Projection
Total Revenue ($ Million)	$0.50	$0.41	$0.27

Oregon Community Solar Program

- This program's goal is to expand the state's renewable energy portfolio and extend the benefits of solar energy to customers who previously did not have access, including customers with low incomes. Funding for this program comes from the ratepayers of PGE, Pacific Power and Idaho Power. OPUC is responsible for the program and Energy Trust provides administration services under a subcontract with the primary program administrator, Energy Solutions.
- The program aligns with Energy Trust's goals around increasing access to renewable energy opportunities for customers it has historically underserved.
- The current program administration contract began in 2019 and concludes in March 2023. An extension of that contract is possible but unknown at this time.

Budgeted Revenue

	2022 Budget	2023 Budget	2024 Projection
Total Revenue ($ Million)	$0.50	$0.38	$0.40

Smart Grid Advanced Load Management & Optimized Neighborhoods (SALMON) Initiative

- This initiative will retrofit approximately 580 buildings in North Portland with distributed energy resources (DERs) such as smart thermostats, smart water heaters, solar with smart inverters, storage and managed electric vehicle charging. The project will demonstrate how DERs can support utility planning and operations. Partners include PGE, National Renewable Energy Laboratory, Community Energy Project and Northwest Energy Efficiency Alliance. The initiative is funded by the U.S. Department of Energy. Energy Trust has a subcontract with PGE to support planning and implementation of the initiative.
- The project will result in at least 10% savings for the portfolio of participating sites, reduce customer bills and increase comfort. The project will prioritize customers with high energy burdens, and additional funding will improve cost-effectiveness and make improvements more affordable for customers. The project will help PGE manage loads during periods of high demand, as an alternative to building new distribution and generation infrastructure.
- Implementation began in 2022 and will conclude in 2027.

Budgeted Revenue

	2022 Budget	2023 Budget	2024 Projection
Total Revenue ($ Million)	$0.00	$0.29	$0.37

Flexible Feeder Initiative

- This is an initiative within the PGE Smart Grid Test Bed that supports the SALMON project (above). Energy Trust has a contract with PGE to introduce new energy efficiency measures and explore how to integrate efficiency with other DERs in the planning, forecasting and design of demand-side management programs.
- This project complements the objectives of the SALMON initiative and will help Energy Trust and utilities quantify the value and cumulative benefits of a suite of DERs. Ultimately, this project will help PGE manage loads during periods of high demand, as an alternative to building new distribution and generation infrastructure.
- Implementation will begin in late 2022 and is expected to conclude in 2024.

Budgeted Revenue

	2022 Budget	2023 Budget	2024 Projection
Total Revenue ($ Million)	$0.00	$0.24	$0.16

Solar Ambassadors

- This project addresses solar deployment barriers and disproportionately low solar awareness in communities of color in the Portland area. Funding for this project comes from a subcontract with National Renewable Energy Laboratory (NREL), which will receive funds from the U.S. Department of Energy.
- This project will help reach and serve more Black, Latino and immigrant and refugee customers. It is a co-creation effort that reflects stakeholder and community priorities and is being led by the communities that are impacted. Community partners are African American Alliance for Homeownership, Verde, Community Energy Project, Solar Oregon, Unite Oregon—Clackamas Chapter and Adelante Mujeres.
- Implementation began in 2021 and will conclude in 2023.

Budgeted Revenue

	2022 Budget	2023 Budget	2024 Projection
Total Revenue ($ Million)	$0.00	$0.09	$0.00

Solar with Justice

- This project improves knowledge dissemination among energy organizations and community-based organizations so that solar can be developed equitably and efficiently in communities where people are experiencing income barriers. Funding for this project comes from the U.S. Department of Energy. Energy Trust provides expert advice and facilitation support under a subcontract with the primary grant recipient, Clean Energy States Alliance.
- This project helps Energy Trust and others develop more effective ways of working with community-based organizations to deploy clean energy in communities experiencing income barriers.
- Implementation began in 2021 and is expected to conclude in 2024.

Budgeted Revenue

	2022 Budget	2023 Budget	2024 Projection
Total Revenue ($ Million)	$0.00	$0.01	$0.01

Pending Contracts

FEMA Grant: Solar Energy Resilience for Vulnerable Communities

- This project will accelerate the construction of solar+storage microgrids in vulnerable Oregon communities impacted by wildfire or subject to public safety power shutoffs. Microgrid feasibility studies will be performed for up to 100 critical facilities or community resilience hubs. Funding for this project comes from the Federal Emergency Management Agency (FEMA) via Oregon's Department of Emergency Management (OEM). Energy Trust will implement this program under an agreement with OEM.
- This effort leverages additional funding to expand and accelerate work Energy Trust is already doing to support local community energy resilience. This work will help acquire more renewable energy resources and distribution system connected technology for ratepayers while helping communities achieve resilience goals.
- Implementation is expected to begin in 2023 and conclude in 2025. Revenue is projected to be approximately $1.2 million in 2023 and $1.5 million in 2024.

PGE Smart Inverter Demonstration Project

- This project will engage up to 500 solar customers located on three feeders to help PGE study how solar smart inverters can provide additional grid benefits that support utility distribution planning and operations. Energy Trust has a contract with PGE to help with project planning and will be supporting implementation, trade ally engagement and customer enrollment under a contract extension that is in-process.
- This project complements core Energy Trust offers for solar and helps PGE learn how inverter-based controls can deliver distribution operations value and address hosting capacity issues. Leveraging Energy Trust's existing infrastructure and expertise makes the project replicable and less costly for ratepayers.
- Planning began in 2022 and implementation is expected to take place in 2023 and 2024. 2023-24 budget levels will be determined through a contracting process that is currently underway.

Planning and Evaluation

The planning and evaluation group includes the planning team and the evaluation and engineering team. The planning team develops long-range energy savings and cost forecasts and manages savings and cost-effectiveness analysis tools and reporting. It works with utilities on resource planning for the utility system as a whole and for local projects. The evaluation and engineering team assesses the effectiveness of efficiency and renewable energy program delivery and updates estimates of savings and generation by studying energy use. It performs evaluations and market research, serves as the owner of third-party spatial and utility customer information, helps other teams effectively use data and participates in regional and national research projects. Additionally, the team reviews and supports development of new and updated efficiency measures and helps Energy Trust incorporate new efficiency technologies into programs.

2023 Context

In addition to overall market context in the Executive Summary, we are responding to the following conditions and drivers:

- Carbon will play a larger role in valuation of program benefits. Benefits are increasingly based on timing of savings and generation and sometimes location.
- It is increasingly important to leverage funding from other sources to ensure programs can meet multiple goals within the regulatory framework.
- The power and gas systems are beset by a new level of uncertainty driven by new policies and rapid changes in energy sources.
- As regional end use load studies approach completion, new tools will be put into place to consider hourly energy, peak and carbon impacts of efficiency and renewable measures. This will impact information staff provide for utility integrated resource planning and responses to queries from utility commissions in Oregon and Washington, utilities and other stakeholders.
- These needs call for an increasingly nimble set of tools to value, forecast and evaluate efficiency and renewable energy.

2023 Significant New Activities

- Analyze how new hourly energy, peak and carbon impacts lead to changes in programs and the value of energy resources.
- Support increasing requests for economic analysis and program impacts from the OPUC and policymakers exploring new policies.
- Work with efficiency programs to refine forecasts of near-term (two-to-five year) savings potential so that Energy Trust can develop programs that are responsive to evolving market conditions and future opportunities, including niche products, new technologies and market needs, and targeted customer groups.
- Streamline analysis of how efficiency and renewable energy can reduce grid costs and meet the policy goals of local governments.
- Adjust tools and analysis as new policy questions arise in regulatory and other forums.
- Update 2024 avoided costs via OPUC docket UM 1893 for use in measure development and planning processes.
- Refine the process for updating and developing new measures and their reportable costs and savings.
- Create new and refined integrated datasets from Energy Trust data, utility customer information and third-party datasets. Train analysts on these datasets and support programs in using them.
- Improve methods for evaluating and reporting on peak savings as part of impact evaluations of all major programs, pilots and coordinated research projects.
- Adjust methods and estimates to address COVID-19 and economic disruptions to energy user behavior.
- Use evaluation results to evolve program approaches.

- Conduct process evaluations with increased focus on reaching diverse markets and how programs are responding to changes in technologies and markets.
- Conduct focused market research projects and consult with programs on the new delivery pilots as well as an increasing number of market tests.
- Support OPUC's avoided cost docket and incorporate the consequent changes in avoided cost into measure development and program planning in 2023 for 2024 use.

2024 Expected Changes and New Initiatives

- New policies and legislation may drive major changes in how we plan and evaluate our programs.

Budgeted Expenditures

	2022 Budget	2023 Budget	2024 Projection
Total Expenditures (millions)*	$6.4	$6.2	$7.1

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Program Marketing

The program marketing team develops and delivers marketing that drives participation in efficiency and renewable energy programs, supports savings and generation goals, and supports Energy Trust's overall organizational goals. The team manages marketing activities of Program Management Contractors (PMC) and Program Delivery Contractors (PDC) and sets the overarching program marketing strategy to ensure consistency across programs. The team aligns with best practices and improves marketing effectiveness by applying lessons learned across sectors.

2023 Context

In addition to overall market context in the Executive Summary, we are responding to the following conditions and drivers:

- Focus is on marketing strategies to reach customers who have not been served well in the past. Significant work completed in 2022 includes the publication of the Multicultural Marketing Guide, the Spanish Language Style Guide and several market research studies.
- The Residential program launched an education and do-it-yourself online resource in 2022 and an online program user experience and home energy assessment. Program marketing will build out and optimize these efforts to empower customers with information they need to choose efficiency solutions that align with their needs, priorities and interests.
- The Run Better/Rinde Más business-to-business campaign is a resource for smaller businesses, especially those in communities of color and low income and rural areas. In 2022, we translated existing content for customers who speak Spanish and are hosting a Spanish-language event in Woodburn with Latino Business Alliance. In 2023, we will expand the campaign by creating more customer story videos and expanding content for specific business types in English and Spanish. This work is aligned with individual program marketing from Existing Buildings and Production Efficiency performed by PMC marketing teams.
- Program marketing is supporting transition to a new Production Efficiency program management contract with Energy 350. Marketing transitions will also occur for the Residential sector (RFP selection is in process).

2023 Significant New Activities

- Expand marketing strategies that engage customers in communities of color, customers experiencing low incomes and rural communities to empower these customers to learn more about and ultimately engage with Energy Trust programs across all sectors.
- Demonstrate commitment to a customer-first approach that more fluidly connects solar and efficiency offerings so customers can make the best choice for them. This will occur through storytelling and changes to program marketing materials, including work to redesign and refine website experience for business and residential customers to ensure neutrality in fuel choice.
- Maximize public relations opportunities to highlight community-led efforts to serve low-income customers and contribute to climate action plans that demonstrate how renewable energy programs are helping customers reach goals.
- Expand inclusive multicultural marketing activity to develop culturally resonant campaigns for English- and non-English-speaking communities. This includes building on current Hispanic/Latino marketing strategies and planning integrated marketing strategies in other languages in urban and rural areas.
- Collaborate with Residential program to develop content and promotional strategies for education and do-it-yourself participation pathways, which provide customers with additional information about efficient technologies and their benefits regardless of a customer's existing fuel source and whether or not Energy Trust offers incentives.

2024 Expected Changes and New Initiatives

- Expand marketing strategies to encompass more languages, including Vietnamese, Japanese, Korean, Thai and Russian.
- Introduce a Residential program awareness marketing campaign that drives people to the new online home energy assessment to learn about and invest in energy-efficient practices and products that meet their unique needs.

Budgeted Expenditures

	2022 Budget	2023 Budget	2024 Projection
Total Expenditures (millions)*	$3.2	$3.7	$3.6

**Expenditure detail is provided under budget details tab in the budget binder. Costs shown in the tables may be represented on more than one action plan and, if added together, will not match the total expenditures listed on the financial statements.*

Operations Support

The operations support group provides leadership and support to business systems as well as operations, and analytic and reporting support for Energy Trust. The group manages projects and processes across all groups and programs to promote alignment of priorities, standardization, replicability and best practices. Staff ensures resources, data and systems architecture, data quality and analysis capabilities are aligned to plan, forecast and deliver programs that are valuable to all customer types and markets. The team leads project processing activities across all efficiency programs in collaboration with the Finance group and provides mentorship and oversight to external implementers, including Program Management Contractors (PMCs).

2023 Context

In addition to overall market context in the Executive Summary, we are responding to the following conditions and drivers:

- Key PMC transitions and changes will occur to the implementation and contracting model within the industrial, residential and renewables sectors.
- The team will need to adapt to support changes to program structure and staffing.
- Large initiatives in coordination with utility partners may uncover systems, data and process enhancements not visible to us at the time of budgeting.

2023 Significant New Activities

- Cross-train operations support staff to ensure standardization and task redundancy for all programs and contracts.
- Lead development and utilization of self-service reporting tools that enable staff and stakeholders to analyze and use information in program design, day-to-day decision making, and project and payment processing.
- Lead large system upgrade projects to improve the process for creating and maintain quality, accurate site data in our core data systems.
- Lead the enhancement of systems, processes and reporting tools to support changes to program structure, implementation contractors, program design and delivery channels.
- Support ongoing system enhancements to project and customer tracking systems to accommodate cross-sector program activities and emerging diversity, equity and inclusion strategies.
- Support the development of requirements to the enterprise financial system to ensure upstream impacts to customer relationship management system (CRM) and Project Tracker are considered in vendor selection and implementation planning.

2024 Expected Changes and New Initiatives

- A large system enhancement to project and customer tracking systems may be needed to accommodate upstream changes from the replacement of the financial and contracting systems.
- Possible changes to organizational reporting metrics, driven by policy changes, may require updates to current tools for budgeting, forecasting and organizational reporting.

Budgeted Expenditures

	2022 Budget	2023 Budget	2024 Projection
Total Expenditures (millions)*	$1.2	$1.4	$1.6

**Expenditure detail is provided under budget details tab in the budget binder. Costs shown in the tables may be represented on more than one action plan and, if added together, will not match the total expenditures listed on the financial statements.*

Information Technology

The information technology (IT) group offers technical support and system enhancements required by Energy Trust's staff. The IT group builds technical proficiency and focuses on continuous improvement of systems in partnership with users. Resources include hardware, infrastructure, information systems, reporting capabilities and technical support.

2023 Context

In addition to overall market context in the Executive Summary, we are responding to the following conditions and drivers:

- The IT group will continue to prioritize support for a hybrid remote Energy Trust workforce.
- Program offers and delivery approaches are becoming more complex, and Energy Trust is working with a broader set of stakeholders. Operating programs efficiently in this environment requires information systems enhancements to build the needed infrastructure to support programs.

2023 Significant New Activities

- Upgrade the customer relationship management system (CRM) to take advantage of new features to improve work efficiency.
- Rearchitect and update processes and systems used to normalize information describing customer sites. This update will improve the quality of data about customer sites.
- Allocate time for completion of critical smaller systems enhancements for operational improvements and building operational capacity.
- Optimize remote infrastructure including laptops, virtual private network functionality, additional security and usability features to support remote work.
- Support the development of requirements to the Enterprise Financial System to consider multiple impacts including integrations to CRM and Project Tracker as well as potential scope within the new financial system to encompass expanded contracting and supplier diversity tracking functionality.
- Upgrade Microsoft SQL Server database application to take advantage of new features.

2024 Expected Changes and New Initiatives

- Implement and build out integrations to new Enterprise Financial System.
- Investigate shifting additional resources from on-premises servers to the cloud.

Budgeted Expenditures

	2022 Budget	2023 Budget	2024 Projection
Total Expenditures (millions)*	$3.8	$4.5	$5.0

**Expenditure detail is provided under budget details tab in the budget binder. Costs shown in the tables may be represented on more than one action plan and, if added together, will not match the total expenditures listed on the financial statements.*

Introduction

Energy Trust's 2023-2024 Utility-Specific Action Plans provide an at-a-glance summary of strategies and activities developed that are unique to customers of each of our five utility partners. These action plans include contents developed by Energy Trust, contents developed by each utility partner and contents that have been jointly developed.

The template for these action plans was developed and approved by all participants in the HB 3141 agreement work sessions held in the Spring of 2022. The template includes:

Engagement approach for community, customer and stakeholder outreach: This section has been discussed in utility coordination meetings and includes activities that are utility-led, Energy Trust led and those that will be jointly led.

Community and stakeholder representative feedback: Community and stakeholder representative feedback was solicited during interactions that were utility-led, Energy Trust led and jointly led.

Utility-specific key activities for the budget year: These activities have been jointly agreed upon by Energy Trust and our utility partners and include outreach, community engagement, marketing program-level activities and targeted initiatives.

Utility-specific budget tables for the upcoming budget year and the following year: Budget tables include utility-specific financials and energy savings and/or generation including goals, Integrated Resource Planning targets, levelized cost and carbon dioxide emissions avoided. For utilities investing a portion of the efficiency tariff to support customer participation in Energy Trust programs, the utility has provided the annual budget for those activities.

Context

House Bill 3141

In accordance with House Bill (HB) 3141 (2021) Section 9, Energy Trust is directed "With public utilities, [to] jointly develop public utility-specific budgets, action plans and agreements that detail the entity's public utility-specific planned activities, resources, and technologies pursuant to ORS 757.054 and 757.612 (3)(b)(B), including coordinated activities that require joint investment and deployment. Each action plan must reflect stakeholder feedback gathered through a public process managed by the entity and the relevant public utility as overseen by the commission." [1]

This process is formalized in the four steps below and is now referred to as the HB 3141 Budget Coordination Memo.

The HB 3141 Budget and Action Plan Process follows four main steps:

- **Step 1:** Market Assessment (Apr-May)
- **Step 2:** Action Planning (Jun-Nov)
- **Step 3:** Budget + Utility-Specific Action Planning (Jul-Nov)
- **Step 4:** Final Plans + Tariff Filing (Oct-Dec)

Within this new construct is the expressed intent to put forth both an Energy Trust 'comprehensive' action plan and 'utility-specific' action plan, inclusive of identified joint investment opportunities and coordinated activities (not solely a function of IRP goals) which will "largely benefit only the customers of that funder utility." [2]

The five utility-specific action plans will be appended to the Energy Trust Action Plan and published as part of the Final Proposed Annual Budget and two-year Action Plans package in December.

The following utility specific action plans were jointly drafted and agreed-upon by the utilities and Energy Trust, and include outreach, community engagement, marketing, program level activities, and targeted initiatives involving joint investment or deployment. Activities highlighted and summarized in the utility-specific action plan will largely benefit only the customers of that funder utility. Activities that benefit customers from multiple utilities will continue to be documented in the Energy Trust program.

[1] Retrieved from: https://olis.oregonlegislature.gov/liz/2021R1/Downloads/MeasureDocument/HB3141/Enrolled
[2] Retrieved from: Budget Process Coordination and Action Plan Memorandum (the "HB 3141 Budget Coordination Memo")(August 3, 2022)

Action plan: 2023-2024
Portland General Electric
Date: December 8, 2022

The following information details key activities planned for Portland General Electric customers, including joint activities with Energy Trust and Portland General Electric. The information is not comprehensive of all activities serving Portland General Electric customers. Activities directed to customers of all electric funding utilities can be found in Energy Trust action plans found in the Action Plan section of the budget packet. Budget tables are inclusive of all revenues, expenditures and energy goals for Portland General Electric customers.

Contents

Informing the 2023 Portland General Electric Action Plan

Engagement approach
In alignment with HB 3141, Energy Trust and Portland General Electric collaborated to produce this 2023-2024 Utility-Specific Action Plan. Energy Trust and Portland General Electric engaged in at least six utility coordination meetings over the course of the budget and action plan development cycle to discuss activities planned that directly benefit Portland General Electric customers. In addition, five working sessions were held between Portland General Electric and Energy Trust teams to collaborate on identification of key joint activities focusing on residential, commercial and renewable energy offers, planning and evaluation, as well as outreach and community engagement.

Community feedback
Regular updates on budget and planning development were provided to Energy Trust's public advisory council meetings and are described below. Parties were not able to engage communities for early input to budget and planning this year, however community feedback was invited during the budget public comment period from October 5 to 19. Energy Trust and Portland General Electric will explore ways to engage community stakeholders such as community-based organizations and the environmental justice community starting early in 2023 for the 2024 budget and action planning cycle.

Stakeholder feedback
Throughout 2022, Energy Trust staff consulted with key stakeholders including its three advisory councils, board, Oregon Public Utility Commission and utility partners for information and input to inform its annual business planning, budgeting and action planning process.

Stakeholder and utility engagements to collect input and feedback included:

- Market intelligence gathered from utilities and Energy Trust's Renewable Energy Advisory Council, Conservation Advisory Council and Diversity Advisory Council on market trends, customer needs/barriers, emerging opportunities and strategic priorities in April and May.
    - Additional market intelligence from the field, including input from Program Management Contractors, was gathered by Energy Trust Programs staff.
- Collaborative "Deep Dive" priority topic engagement sessions with Energy Trust's Renewable Energy Advisory Council, Conservation Advisory Council and Diversity Advisory Council on strategic direction and customer needs in June and July.
- Joint budget planning sessions with utilities in July.
- Quarter two forecast meetings with utilities in August.
- Ongoing utility engagement meetings from August through November.
- Continued engagement with Oregon Public Utility Commission staff from August through December.
- Presentation of highlights from utility-specific plans, in development, to Energy Trust's Conservation Advisory Council and Renewable Energy Advisory Council in September**.**
- Energy Trust Board of Directors public budget workshop in October.
- Oregon Public Utility Commission public workshop on Energy Trust's Budget and Action Plan in November.
- Energy Trust's public board meeting in December where the final proposed budget and action plan is presented and considered for adoption.

Portland General Electric-specific 2023 Key Activities

For all key activity areas below, see Energy Trust action plan for activities that will serve across multiple utilities, including Portland General Electric.

Outreach and community engagement

- Support community-led energy sustainability or climate plan development in Gresham, Lake Oswego, Oregon City, Tigard, Salem, Hillsboro, Portland and Milwaukie to identify energy efficiency and renewable energy projects.
- Coordinate and provide information to support Portland General Electric's establishment of a Utility Community Benefits and Impacts Advisory Group (CBIAG).
- Establish routine collaboration for Energy Trust and Portland General Electric staff engaged in stakeholder and community relations and efforts to share information, support coordination and learnings.
- Explore how to work together on community capacity building efforts such as Energy Trust and Portland General Electric grant and community offers.

Marketing

- Establish routine collaboration for Energy Trust and Portland General Electric staff engaged in marketing to share customer segmentation, support coordination and learnings.
- Kick off collaboration with Portland General Electric to launch a new "Efficient Heating for All" marketing campaign that focuses on encouraging customers with inefficient electric resistance heating to convert to ductless or ducted heat pumps and which seeks to incorporate complementary sources of funding at the state (Oregon Department of Energy) and federal level (Inflation Reduction Act).
- Maximize collaboration between Energy Trust and Portland General Electric outreach and marketing to engage small businesses with targeted offerings.
- Provide marketing subject matter expertise and support for Portland General Electric Smart Grid Advanced Load Management and Optimized Neighborhood (SALMON)[1] project. Develop annual cooperative marketing calendars to document collaborative efforts focused on high-priority technologies.

Energy efficiency activities

- Production Efficiency will support Portland General Electric demand response programs by recommending leads for industrial/agricultural curtailment programs.

[1] Smart Grid Advanced Load Management & Optimized Neighborhoods (SALMON) is not a public purpose charge (PPC) funded project but is included with the intent to be holistic in communicating the areas of partnership for stakeholders.

- Existing Buildings: Continue to collaborate with Portland General Electric on flexible load initiatives such as delivering smart thermostats to small businesses, heat pump water heaters and SALMON.
- Existing Buildings: Pilot affordable multifamily retrofits of high-efficiency ductless heat pumps displacing existing electric resistance heat.
- Collaborate with electric utilities to develop processes to include both the design and deployment of energy storage/distribution system connected technologies (DSCT) and flex-enabling controls with Energy Partner for initiating grid-interactive technologies and design for buildings in the Portland General Electric service area.
- Establish routine collaboration for Energy Trust and Portland General Electric staff to formalize processes to co-deliver controls-based efficiency solutions that include DSCT, such as storage, and controls.
- Test additional smart thermostat models with Portland General Electric to expand qualified products that deliver demand response and energy efficiency benefits.

Planning and Evaluation

- Support Portland General Electric's Integrated Resource Planning (IRP) process as applicable
- Work with Portland General Electric, stakeholders and Oregon Public Utility Commission to quantify blended electric avoided costs to be used in 2024 for 2025 planning and development.
- Develop and refine pipeline reporting tools to support increasingly collaborative budget and forecasting processes with Portland General Electric, including integration of PowerClerk and exploration of opportunities for ratepayer cost reduction via shared third-party evaluation.
- Coordinate with Portland General Electric on high-level Distribution System Planning and support the development of targeted load management projects as they emerge.
- Measure development priorities include commercial thermostats and hybrid HVAC.

Renewables, resiliency activities

- Work with Portland General Electric to integrate solar smart inverter and smart battery storage capabilities, as appropriate, into existing and future Smart Grid Test Bed (SGTB)[2] projects.
    - Smart Inverter Demonstration
    - SALMON
    - Multifamily demonstration project
    - In coordination with Portland General Electric's Smart Battery Pilot, encourage customer adoption of solar+storage using a modified Solarize campaign
- Support the City of Beaverton's Sexton Mountain hydropower project in reaching commercial operation.
- Commit an installation incentive to the Oregon Department of Fish and Wildlife for a hydropower project at their Clackamas River Fish Hatchery if appropriate.

[2] Smart Grid Test Bed (SGTB) is not a public purpose charge (PPC) funded project but is included with the intent to be holistic in communicating the areas of partnership for our stakeholders.

Targeted initiatives involving joint investment and deployment (e.g., TLM, DR/EE)

- Continue to collaborate with Portland General Electric on flexible load initiatives such as delivering smart thermostats to small businesses, heat pump water heaters and SALMON.
- SALMON project scope:
  - Retrofit approximately 580 buildings in North Portland with distributed energy resources such as smart thermostats, smart water heaters, solar with smart inverters, storage and managed electric vehicle charging.
  - Implementation began in 2022 and will conclude in 2027.
  - Assist in evaluation
  - Flexible Feeder Initiative (pending) within the Portland General Electric SGTB:
    - Portland General Electric Smart Inverter Demonstration Project
    - Engaging solar customers to help study how solar smart inverters can provide additional grid benefits that support utility distribution planning and operations
    - Portland General Electric Smart Battery Pilot
- Provide support for customer outreach, contractor training, quality management and incentive processing.

Expected changes for 2024

- None identified at this time.

Portland General Electric-specific 2023 Budget

2023 Portfolio Level

Financial Overview	OPUC Efficiency	OPUC Renewables	Total for PGE
Beginning Net Assets	$28,754,457	$8,752,828	$37,507,285
Revenue	$87,833,700	$9,100,000	$96,933,700
Expenditures	$95,729,122	$12,692,387	$108,421,509
Net Income	$(7,895,422)	$(3,592,387)	$(11,487,809)
Ending Net Assets	$20,859,035	$5,160,441	$26,019,476
Renewables Funds Dedicated		$282,066	
Renewables Funds Not Dedicated		$4,896,474	

Electric Savings and Generation Overview	OPUC Efficiency	OPUC Renewables	Total for PGE
Electric Savings (kWh) Annual Goal	223,654,466	-	223,654,466
Levelized cost per kWh saved	$0.042	-	$0.04
Renewables Generation (kWh) Annual Goal	-	27,877,025	27,877,025
Levelized cost per kWh generated	-	$0.033	$0.033
Electric Savings (kWh) – IRP target	27.77	-	27.77

2023 Portland General Electric-invested Efficiency Funds

Portland General Electric collaborates with Energy Trust of Oregon to increase customers' awareness of and participation in Energy Trust residential and small-to-mid-sized business energy efficiency programs through marketing and outreach activities. In addition, Portland General Electric uses Schedule 110 funding to enhance trade ally awareness of Energy Trust's heat pump program and heat pump installation standards. As a utility with existing customer relationships and communication channels, Portland General Electric can enhance Schedule 110 activity through newsletters and additional communications channels as well as seek to support and augment coordinated and joint marketing campaigns with Energy Trust.

Utility-invested Tariff Funds	OPUC Efficiency
PGE	$1,300,000

Ongoing Communication and Coordination between PGE and Energy Trust

Portland General Electric and Energy Trust will engage in cross-organizational communications and coordination. This coordination is critical for success in acquiring the cost-effective conservation that is the subject of Schedule 110 and, separate from the public purpose charge, all achievable cost-effective energy efficiency can be planned for, pursued and funded through other utility-specific ratemaking processes. While recognizing that titles and positions may change, regular information-sharing meetings, communication and coordination will occur between:

- Energy Trust Executive Director, Portland General Electric Vice President of Public Policy and Portland General Electric Vice President of Grid Architecture, Integration & System Operations
- Energy Trust Directors of Efficiency, Operations and Communications and the Portland General Electric Commercial, Industrial and Residential (CI&R) Outreach Team Managers, Portland General Electric Senior Government Affairs Manager, Portland General Electric's Lead Energy Trust Liaison and Portland General Electric representatives to Energy Trust's Renewable Energy and Conservation Advisory Councils.
- Staff work groups organized around three categories of collaboration: program delivery (Marketing and Outreach), community engagement and non-wires solution (design and deployment)

Energy Trust Directors of Programs, Operations and Communications and Portland General Electric liaison Planning meetings will continue among Energy Trust and Portland General Electric at least annually.

Marketing Support

Portland General Electric will continue to support Energy Trust programs with ongoing communications to customers paid for by utility general funding, not Energy Efficiency funding schedules 109 and110, including, but not limited to:

- Residential customers: Home Connection digital and print newsletter, email and digital advertising campaigns supporting heat pumps, heat pump landing page updates (including new "what heat pump is right for you?" quiz). Business customers: Quarterly Business Connection newsletters, industry and customer events, direct outreach and digital advertising,
- Energy Efficiency information on Portland General Electric's website, including links to Energy Trust programs,
- Portland General Electric Energy Expert customer service representatives ("CSR") will transfer appropriate callers to Energy Trust or Energy Trust PMC call centers,
- Portland General Electric Energy Expert CSRs will continue to receive additional training on energy efficiency and efficient technologies, annually or as needed.

Utilizing Schedule 110 funds, Portland General Electric will also provide additional marketing and outreach to encourage more customers to take advantage of Energy Trust programs.

- Portland General Electric will provide up to three (3) Outreach Specialists to assist in enhancing small business customer and trade ally awareness and participation in Energy Trust programs. Portland General Electric Outreach Specialists will deliver free energy efficiency consultations to interested customers and pass on qualified leads to trade allies or to the appropriate Energy Trust program.
- Portland General Electric will provide one (1) Heat Pump Technical Specialist to work with builders and trade allies and perform residential installation inspections to ensure that heat pumps are installed for maximum efficiency.
- Portland General Electric will provide a Data Management Specialist to support the heat pump program data bases and systems that track installations and inspections. This position will also perform inspections as needed and work with the Portland General Electric approved contractors to assure efficiency and quality of data.
- Portland General Electric will work with Energy Trust to deliver promotions to encourage customers to take advantage of Energy Trust programs. Portland General Electric may coordinate with Energy Trust on market research designed to increase effectiveness of outreach efforts.

Reporting

Portland General Electric will supply budget expenditures for marketing and outreach activities within thirty (30) days of the close of each quarter. Portland General Electric will present annual results to the Oregon Public Utility Commission in coordination with Energy Trust 's annual report to the Oregon Public Utility Commission.

Portland General Electric-Specific 2023 Program Level

Expenditures Detail	OPUC Efficiency	New Buildings	Existing Buildings with MF	NEEA Commercial	Industry and Agriculture	Residential	NEEA Residential	OPUC Renewables	Solar	Other Renewables
Incentives	$46,364,534	$5,076,285	$16,522,263	-	$12,779,173.98	$11,986,812	-	$7,683,338	$6,989,250	$694,088
Program Delivery Contractors	$33,281,760	$4,109,437	$13,654,996	$1,869,574	$6,101,795.15	$5,536,295	$2,009,662	$1,029,898	$784,938	$244,960
Employee Salaries & Fringe Benefits	$8,051,367	$1,095,807	$2,566,728	$97,837	$2,250,338.29	$1,929,968	$110,688	$1,983,713	$1,441,527	$542,187
Agency Contractor Services	$778,188	$106,675	$356,914	$8,586	$173,487.96	$123,165	$9,360	$210,120	$194,149	$15,971
Planning & Evaluations Services	$1,891,792	$403,791	$767,465	$3,723	$366,620.03	$345,258	$4,936	$48,846	$44,693	$4,153
Advertising & Marketing Services	$1,625,810	$169,385	$510,615	$11,793	$285,774.35	$635,520	$12,723	$305,298	$263,823	$41,475
Other Professional Services	$2,508,193	$162,156	$956,981	$11,689	$666,559.70	$697,842	$12,965	$898,797	$723,382	$175,416
Travel, Meetings, Trainings & Conferences	$277,940	$36,277	$108,060	$3,090	$60,483.13	$66,627	$3,404	$58,479	$45,357	$13,122
Dues, Licenses & Fees	$111,705	$14,131	$53,723	$1,628	$21,880.95	$18,360	$1,982	$29,463	$20,889	$8,574
Software & Hardware	$195,680	$25,528	$62,167	$2,344	$57,377.18	$45,605	$2,658	$277,969	$264,848	$13,121
Depreciation & Amortization	$103,580	$13,470	$33,070	$1,269	$30,127.51	$24,209	$1,435	$27,042	$20,282	$6,760
Office Rent & Equipment	$483,717	$63,146	$152,959	$5,718	$140,872.35	$114,535	$6,487	$128,369	$96,142	$32,227
Materials, Postage & Telephone	$48,907	$5,123	$17,082	$532	$16,214.07	$9,360	$596	$10,093	$7,374	$2,719
Miscellaneous Expenses	$5,949	$717	$2,149	$113	$1,492.38	$1,353	$123	$959	$786	$173
Expenditures	$95,729,122	$11,281,928	$35,765,171	$2,017,896	$22,952,197	$21,534,911	$2,177,020	$12,692,387	$10,897,440	$1,794,947

Expenditures Detail by Function	OPUC Efficiency	New Buildings	Existing Buildings with MF	NEEA Commercial	Industry and Agriculture	Residential	NEEA Residential	OPUC Renewables	Solar	Other Renewables
Program Costs	$90,002,550	$10,607,036	$33,625,677	$1,897,184	$21,579,183	$20,246,680	$2,046,789	$11,933,121	$10,245,549	$1,722,333
Administrative Costs	$5,726,572	$674,892	$2,139,493	$120,712	$1,373,013.83	$1,288,231	$130,231	$759,266	$651,891	$112,906
Communications and Outreach	$3,515,733	$414,338	$1,313,506	$74,109	$842,938.74	$790,888	$79,953	$466,139	$400,218	$69,219
Management & General	$2,210,839	$260,553	$825,987	$46,603	$530,075.09	$497,343	$50,278	$293,127	$251,674	$43,687
Expenditures	$95,729,122	$11,281,928	$35,765,171	$2,017,896	$22,952,197	$21,534,911	$2,177,020	$12,692,387	$10,897,440	$1,835,240

Energy Savings and Generation Detail	**OPUC Efficiency**	New Buildings	Existing Buildings with MF	NEEA Commercial	Industry and Agriculture	NEEA Industrial	Residential	NEEA Residential	**OPUC Renewables**	Solar	Other Renewables
Electric Savings (kWh) – Annual Goal	223,654,466	23,742,582	69,954,961	10,627,407	77,017,844	3,947,744	19,181,513	19,182,414	-	-	-
Levelized cost per kWh saved	$0.042	$0.042	$0.051	$0.032	$0.031	-	$0.087	$0.012	-	-	-
Renewables Generation (kWh) – Annual Goal	-	-	-	-	-	-	-	-	27,877,025	27,293,025	584,000
Levelized cost per kWh generated	-	-	-	-	-	-	-	-	$0.033	$0.029	$0.222
Electric Savings (kWh) – IRP Target	27.77	Included in OPUC Efficiency	Included in OPUC Efficiency	Included in OPUC Efficiency	Included in OPUC Efficiency	Included in OPUC Efficiency	Included in OPUC Efficiency	Included in OPUC Efficiency	-	-	-

Portland General Electric-specific 2024 Budget

2024 Portfolio Level

Financial Overview	OPUC Efficiency	OPUC Renewables	Total for PGE
Beginning Net Assets	$20,859,035	$5,160,441	$26,019,476
Revenue	$87,833,700	$9,100,000	$96,933,700
Expenditures	$103,056,275	$12,824,928	$115,881,203
Net Income	$(15,222,575)	$(3,724,928)	$(18,947,503)
Ending Net Assets	$5,636,460	$1,435,513	$7,071,973
Renewables Funds Dedicated		$3,540	
Renewables Funds Not Dedicated		$1,450,073	

Electric Savings and Generation Overview	OPUC Efficiency	OPUC Renewables	Total for PGE
Electric Savings (kWh) Annual Goal	246,253,836	-	246,253,836
Levelized cost per kWh saved	$0.042	-	$0.042
Renewables Generation (kWh) Annual Goal	-	20,038,375	20,038,375
Levelized cost per kWh generated	-	$0.046	$0.046
Electric Savings (kWh) – IRP target	26.66	-	26.66

2024 Portland General Electric-invested Efficiency Funds

Reflects planned investments of a portion of efficiency tariff funds collected by the utility that are in addition to funds received by Energy Trust

Utility-invested Tariff Funds	OPUC Efficiency
PGE	TBD

Action items to be determined during next budget cycle.

Portland General Electric-specific 2024 Program Level

Expenditures Detail	OPUC Efficiency	New Buildings	Existing Buildings with MF	NEEA Commercial	Industry and Agriculture	Residential	NEEA Residential	OPUC Renewables	Solar	Other Renewables
Incentives	$51,557,617	$4,455,074	$17,580,990	-	$16,454,946	$13,066,607	-	$7,502,540	$6,599,000	$903,540
Program Delivery Contractors	$34,952,010	$3,666,700	$15,212,114	$2,132,705	$6,516,242.61	$5,633,845	$1,790,404	$994,046	$784,938	$209,108
Employee Salaries & Fringe Benefits	$8,806,077	$1,021,052	$2,850,405	$115,754	$2,520,057.64	$2,191,287	$107,522	$2,264,770	$1,503,613	$761,157
Agency Contractor Services	$805,756	$117,676	$351,270	$8,934	$188,181.17	$131,787	$7,908	$225,506	$194,033	$31,473
Planning & Evaluations Services	$1,911,378	$287,120	$703,048	$6,316	$428,011.93	$479,064	$7,817	$111,079	$87,532	$23,547
Advertising & Marketing Services	$1,511,247	$135,850	$510,569	$12,695	$307,660.49	$533,730	$10,743	$307,361	$255,710	$51,651
Other Professional Services	$2,262,321	$185,687	$789,377	$11,884	$540,202.84	$724,537	$10,633	$884,171	$667,398	$216,773
Travel, Meetings, Trainings & Conferences	$297,749	$32,592	$114,617	$3,751	$67,298.82	$76,196	$3,293	$61,584	$44,573	$17,011
Dues, Licenses & Fees	$110,130	$12,450	$51,888	$1,769	$23,027.48	$19,108	$1,888	$34,040	$19,831	$14,209
Software & Hardware	$218,870	$24,407	$70,613	$2,882	$65,112.65	$53,170	$2,686	$274,345	$255,484	$18,861
Depreciation & Amortization	$80,269	$8,914	$26,014	$1,079	$23,750.32	$19,510	$1,001	$21,415	$14,688	$6,727
Office Rent & Equipment	$489,632	$54,734	$157,200	$6,338	$144,624.68	$120,819	$5,917	$133,051	$91,064	$41,987
Materials Postage & Telephone	$48,615	$4,356	$17,183	$576	$16,303.62	$9,671	$525	$10,262	$6,883	$3,380
Miscellaneous Expenses	$4,605	$466	$1,652	$91	$1,258.01	$1,059	$79	$758	$576	$183
Expenditures	$103,056,275	$10,007,078	$38,436,939	$2,304,776	$27,296,678	$23,060,390	$1,950,415	$12,824,928	$10,525,321	$2,299,606

Expenditures Detail by Function	OPUC Efficiency	New Buildings	Existing Buildings with MF	NEEA Commercial	Industry and Agriculture	Residential	NEEA Residential	OPUC Renewables	Solar	Other Renewables
Program Costs	$96,890,790	$9,408,390	$36,137,396	$2,166,889	$25,663,617	$21,680,770	$1,833,728	$12,057,659	$9,895,629	$2,162,029
Administrative Costs	$6,165,485	$598,687	$2,299,543	$137,886	$1,633,061.62	$1,379,620	$116,686	$767,269	$629,692	$137,577
Communications and Outreach	$3,737,592	$362,932	$1,394,011	$83,588	$989,981.85	$836,342	$70,737	$465,128	$381,727	$83,401
Management & General	$2,427,893	$235,756	$905,532	$54,298	$643,079.77	$543,277	$45,950	$302,141	$247,965	$54,176
Expenditures	$103,056,275	$10,007,078	$38,436,939	$2,304,776	$27,296,678	$23,060,390	$1,950,415	$12,824,928	$10,525,321	$2,299,606

Energy Savings and Generation Detail	OPUC Efficiency	New Buildings	Existing Buildings with MF	NEEA Commercial	Industry and Agriculture	NEEA Industrial	Residential	NEEA Residential	OPUC Renewables	Solar	Other Renewables
Electric Savings (kWh) – Annual Goal	246,253,836	23,799,455	74,298,310	10,826,443	87,310,650	4,050,646	21,263,247	24,705,086	-	-	-
Levelized cost per kWh saved	$0.042	$0.043	$0.051	$0.036	$0.033	-	$0.085	$0.008	-	-	-
Renewables Generation (kWh) – Annual Goal	-	-	-	-	-	-	-	-	20,038,375	18,738,375	1,300,000
Levelized cost per kWh generated	-	-	-	-	-	-	-	-	$0.046	$0.041	$0.128
Electric Savings (kWh) – IRP Target	26.66	Included in OPUC Efficiency	Included in OPUC Efficiency	Included in OPUC Efficiency	Included in OPUC Efficiency	Included in OPUC Efficiency	Included in OPUC Efficiency	Included in OPUC Efficiency	-	-	-

Action Plan: 2023-2024
Pacific Power
Date: December 8, 2022

The following information details key activities planned for Pacific Power customers, including joint activities with Energy Trust and Pacific Power. The information is comprehensive of all Energy Trust activities benefiting Pacific Power customers.

Contents

Informing the 2023 Pacific Power Action Plan

Engagement Approach
Pacific Power and Energy Trust are continually evolving engagement strategies for increasingly complex programs to meet changing customer dynamics. New statutory language from HB 3141 is intended to assure parties remain committed to upfront planning and coordination to ensure respective energy efficiency and renewable energy programs and initiatives avoid overlap, are clear to customers and developed to value common benefits to Pacific Power's distribution system and program participants.

In alignment with HB 3141, Energy Trust and its utility partners collaborated to co-produce the 2023-2024 Utility-Specific Action Plans. Energy Trust and Pacific Power engaged in at least six utility coordination meetings over the course of the budget and action plan development cycle to discuss activities planned that directly benefit Pacific Power customers. In addition, four working sessions were held between Pacific Power and Energy Trust teams to collaborate on development of action plans focusing on residential, commercial and renewable energy offers as well as outreach and community engagement.

Key Principles of Coordination

- Leverage existing utility community and customer relationships to raise awareness of Energy Trust program opportunities and benefits.
- Identify opportunities to help market and otherwise support outreach activities.
- Avoid duplication of efforts and support the flexibility needed to manage program resources.
- Focus on understanding and awareness of the concepts, strategic connection and key elements of the delivery strategy and plan.
- Two-way coordination on programs beyond "the basics"; community energy planning, transportation electrification, resiliency planning and programs, community solar and other community-based generation.
- Community coordination must be transparent among the parties (the community, the utility and Energy Trust).
- Continually improve the connections between renewable and energy efficiency programs and utility system planning and implementation, with increased focus on equity.

Community Feedback
Regular updates on budget and planning development were provided to Energy Trust's public advisory council meetings and are described below. Parties were not able to engage communities for early input to budget and planning this year, however community feedback was invited during the budget public comment period from October 5 to 19. Energy Trust and Pacific Power will explore ways to engage community stakeholders such as community-based organizations and the environmental justice community starting early in 2023 for the 2024 budget and action planning cycle.

Stakeholder Feedback
Throughout 2022, Energy Trust staff consulted with key stakeholders including its three advisory councils, board, Oregon Public Utility Commission and utility partners for information and input to inform its annual business planning, budgeting and action planning process.

Stakeholder and utility engagements to collect input and feedback included:

Pacific Power

- Pacific Power and Energy Trust held a variety of joint stakeholder engagements throughout 2022 to implement HB 3141. For 2023, the action plan and budget will be part of the Community Benefits and Investment Advisory Group (CBIAG).

Energy Trust

- Market intelligence gathered from utilities and Energy Trust's Renewable Energy Advisory Council, Conservation Advisory Council and Diversity Advisory Council on market trends, customer needs/barriers, emerging opportunities and strategic priorities in April and May.
- Additional market intelligence from the field, including input from Program Management Contractors, was gathered by Energy Trust Programs staff.
- Collaborative "Deep Dive" priority topic engagement sessions with Energy Trust's Renewable Energy Advisory Council, Conservation Advisory Council and Diversity Advisory Council on strategic direction and customer needs in June and July.
- Joint budget planning sessions with utilities in July.
- Quarter two forecast meetings with utilities in August.
- Ongoing utility engagement meetings from August through November.
- Continued engagement with Oregon Public Utility Commission staff from August through December.
- Presentation of highlights from utility-specific plans, in development, to Energy Trust's Conservation Advisory Council and Renewable Energy Advisory Council in September**.**
- Energy Trust Board of Directors public budget workshop in October.
- Oregon Public Utility Commission public workshop on Energy Trust's Budget and Action Plan in November.
- Energy Trust's public board meeting in December where the final proposed budget and action plan is presented and considered for adoption.

Pacific Power-specific 2023 Key Activities

Energy Efficiency Activities
Pacific Power

- Home Energy Reports will continue in digital format and expand to paper. Pacific Power's **Home Energy Reports** provide customers an individualized report, detailing how, when and where they are using energy. Customers see energy costs by appliance, compare energy use month to month and get personalized energy-saving tips and incentive offers for Energy Trust. Energy efficiency savings acquisition is included in Energy Trust overall energy efficiency acquisition results.

- **Demand response** programs in Oregon. Pacific Power is currently designing local demand response programs that will focus on 1) commercial & industrial curtailment, 2) residential smart thermostat and water heaters, 3) irrigation load control and 4) potential customer battery storage programs. All program development will be in consultation with Energy Trust to ensure program alignment with new and existing energy efficiency and renewable energy programs to maximize customer participation and results.
- Continue to plan, develop and deploy **Distribution System Planning non-wires solutions pilots**. In addition to proposing the equipment, technology or programs needed to meet identified grid needs, Pacific Power will develop pilot concept proposals in which non-wire solutions will be used in place of traditional utility infrastructure investments. Pacific Power will develop pilot proposals collaboratively with Energy Trust and community stakeholders to address local grid and community needs from new and existing energy efficiency and renewable energy programs.
- Explore federal, state and other grant and/or funding opportunities, where feasible and beneficial for energy efficiency, renewable energy, demand response, transportation electrification, etc.

Energy Trust

- Production Efficiency will support Pacific Power demand response programs by recommending leads to irrigation load control and industrial curtailment programs.
- Existing Buildings will expand outreach presence and implementation staff outside of the Portland Metro area through community-led efforts.
- Existing Buildings will pilot affordable multifamily retrofits of high efficiency ductless heat pumps displacing electric resistance heat.
- New Buildings will work with electric utilities to explore grid-interactive technologies and design for buildings in the Pacific Power service area.
- Continue offering increased incentives for energy modeling in fire-affected communities in the Pacific Power service area.
- Test additional smart thermostat models with Pacific Power to expand qualified products that deliver demand response and energy efficiency benefits.

Renewables, Resiliency Activities

Pacific Power

- Co-develop with Energy Trust Distribution System Connected Technology[1] analysis and potential offerings that stack value and support reliability, resilience and integration of renewable energy resources (e.g., grid-connected storage).
- Prioritize low- to moderate-income programs and Pacific Power priority community energy planning within new Energy Trust cross-sectoral group. Develop protocols and a cross-agency team for partnering on support in planning and implementation for local governments.
- Partner to focus on formalizing a process for microgrid siting, grants, design and delivery for water/wastewater treatment plants and other emergency outage hubs.
- Develop HB 2021 community clean energy tariff and participation agreement by prioritizing development and delivery of community-based resource funding.
- Develop and deploy Distribution System Planning non-wires solutions pilots. In addition to proposing the equipment, technology or programs needed to meet identified grid needs, Pacific Power will develop two or more pilot concept proposals in which non-wire solutions will be used in place of traditional utility infrastructure investments. Pacific Power will develop pilot proposals

[1] From House Bill 3141, preliminarily defined by the Oregon Public Utility Commission as smart inverters and smart battery energy storage systems.

collaboratively with Energy Trust and community stakeholders to address local grid and community needs from new and existing energy efficiency and renewable energy programs.

Energy Trust

- Support development and successful implementation of Pacific Power's potential smart battery storage pilot/program.
- Support the City of Medford to develop an energy resilient water resource recovery facility featuring onsite renewable energy resources, energy storage and microgrid.
- Deploy hydropower project development assistance for City of Bend's potential project at the Outback Drinking Water facility and for Wallowa Lake Dam hydropower project.
- Jointly develop with Pacific Power lessons learned from Wallowa County energy planning and share outcomes from the plan with other communities interested in energy planning.

Marketing

Pacific Power

- Co-develop an annual marketing, community outreach and stakeholder engagement plan for quarterly or seasonal promotion that coordinates Energy Trust and Pacific Power program marketing and communications to support program goals.
- Host a joint meeting to revisit co-branded marketing expectations of Energy Trust and Pacific Power.

Energy Trust

- Continue to support and develop new cooperative marketing strategies to promote the Residential and Business Home Energy Reports.
- Develop annual marketing calendars that include planned Energy Trust-led campaigns to evolve cooperative marketing strategies for Residential heat pumps and other top-priority dual-fuel and business offers.

Outreach and Community Engagement

Pacific Power

- Co-develop an annual marketing, community outreach and stakeholder engagement plan for quarterly or seasonal promotion that coordinates Energy Trust and Pacific Power program marketing and communications to support program goals.
- Host a joint meeting with Energy Trust and Pacific Power's regional business managers to discuss managed accounts and when/how advanced notification of engagement can occur.
- Host a presentation meeting from Energy Trust for Pacific Power's regional business managers to review and learn about available Energy Trust energy efficiency and renewable energy programs and other Pacific Power programs for managed customers and communities.
- Host a joint meeting to share available Energy Trust and Pacific Power data on customer satisfaction, energy burden, community profiles/dynamics and ad hoc survey data (distribution system planning, diversity, equity and inclusion, etc.). Develop a jointly agreed list of target communities for energy efficiency and renewable energy program support within Pacific Power service area.
- Contract with a third party to support community engagement and outreach for Energy Trust and Pacific Power customer-facing programs (i.e., energy efficiency, renewable energy, demand response, resilience, energy burden/alternate rate programs, transportation electrification, etc.).

Energy Trust

- Support community-led energy sustainability or climate plan development to identify energy projects in communities including Confederated Tribes of the Umatilla Indian Reservation, Grants Pass, Gresham, Lane County, Hood River, Wallowa County, Deschutes County, Portland and Bend.
- Introduce Resource Assistance for Rural Environments AmeriCorps members to Pacific Power regional business managers and facilitate information sharing in Klamath Falls, Lake County, Jackson County, Grants Pass, Wallowa County and Deschutes County.
- Coordinate and provide information to support Pacific Power's establishment of a Utility Community Benefits and Impacts Advisory Group.
- Consider establishing a routine meeting for Energy Trust and Pacific Power staff engaged in stakeholder and community relations and efforts to share information, support coordination and learnings.
- Share community and market insights gathered through surveys by Energy Trust and Pacific Power.
- Explore how to work together on community capacity building efforts such as Energy Trust and Pacific Power grant and community offers.
- Continue to serve as point of contact to communities rebuilding from the 2020 Labor Day fires and provide support to recovery efforts by individual customers, businesses, cities, counties, long-term recovery groups and nonprofits.
- Work with Pacific Power to develop regional offers and market interventions to simplify participation for rural customers and contractors in Baker, Union and Malheur counties in Eastern Oregon and Klamath county in Southern Oregon.

Planning and Evaluation

Energy Trust

- Support Pacific Power's Integrated Resource Plan (IRP) process as applicable.
- Conduct savings impact evaluation on Bidgely Home Energy Report product.
- Work with Pacific Power stakeholders and the Oregon Public Utility Commission to quantify blended electric avoided costs to be used in 2024 for 2025 planning and development.
- Develop and refine pipeline reporting tools to support increasingly collaborative budget and forecasting processes with Pacific Power.
- Coordinate with Pacific Power on high-level Distribution System Planning and support targeted load management projects as they emerge.

Targeted joint investment initiatives and deployment

- Pacific Power will take inventory of data sharing needs and adjust customer information sharing agreements or business rules accordingly.
- Energy Trust will support Pacific Power's Distribution System Planning process and work with Pacific Power to identify pilot projects using a Targeted Load Management model in order to meet Distribution System Planning requirements.

Expected Changes for 2024

- Pacific Power will examine potential for transportation electrification efficiency and value stacking through marketing and other potential approaches.

Pacific Power-specific 2023 Budget
2023 Portfolio Level

Financial Overview	OPUC Efficiency	OPUC Renewables	Total for Pacific Power
Beginning Net Assets	$16,815,798	$6,479,502	$23,295,300
Revenue	$56,640,480	$6,378,061	$63,018,541
Expenditures	$60,435,299	$8,102,743	$68,538,041
Net Income	$(3,794,819)	$(1,724,682)	$(5,519,500)
Ending Net Assets	$13,020,979	$4,754,820	$17,775,800
Renewables Funds Dedicated		$477,300	
Renewables Funds Not Dedicated		$4,295,943	

Electric Savings and Generation Overview	OPUC Efficiency	OPUC Renewables	Total for Pacific Power
Electric Savings (kWh) Annual Goal	172,019,060	-	172,019,060
Levelized cost per kWh saved	$0.035	-	$0.035
Renewables Generation (kWh) Annual Goal	-	19,629,150	19,629,150
Levelized cost per kWh generated	-	$0.030	$0.030
Electric Savings (kWh) – IRP target	21.18	-	21.18

2023 Pacific Power-invested Efficiency Funds
Reflects planned investments of a portion of efficiency tariff funds collected by the utility that are in addition to funds received by Energy Trust

Utility-invested Tariff Funds	OPUC Efficiency
Pacific Power	$2,000,000

Pacific Power-Specific 2023 Program Level Detail

Expenditures Detail	OPUC Efficiency	New Buildings	Existing Buildings with MF	NEEA Commercial	Industry and Agriculture	Residential	NEEA Residential	OPUC Renewables	Solar	Other Renewables
Incentives	$28,880,071	$2,553,251	$9,671,866	-	$7,781,675.71	$8,873,278	-	$4,843,500	$4,230,250	$613,250
Program Delivery Contractors	$21,264,894	$2,075,624	$8,262,766	$1,353,830	$3,898,952.93	$4,218,449	$1,455,273	$620,362	$402,822	$217,540
Employee Salaries & Fringe Benefits	$5,077,812	$552,319	$1,525,509	$70,847	$1,392,400.28	$1,456,584	$80,153	$1,341,757	$861,542	$480,215
Agency Contractor Services	$479,192	$53,767	$212,128	$6,217	$107,345.94	$92,955	$6,778	$130,181	$116,035	$14,145
Planning & Evaluations Services	$1,300,197	$204,518	$457,055	$2,696	$228,846.72	$403,507	$3,575	$23,517	$19,838	$3,679
Advertising & Marketing Services	$1,053,428	$85,375	$303,479	$8,540	$176,823.32	$469,998	$9,213	$194,982	$157,676	$37,306
Other Professional Services	$1,607,465	$81,731	$568,772	$8,464	$412,434.84	$526,674	$9,388	$608,201	$452,453	$155,748
Travel, Meetings, Trainings & Conferences	$174,920	$18,285	$64,224	$2,237	$37,424.03	$50,285	$2,465	$38,751	$27,108	$11,643
Dues, Licenses & Fees	$69,062	$7,122	$31,930	$1,179	$13,538.87	$13,857	$1,436	$20,096	$12,485	$7,611
Software & Hardware	$123,359	$12,867	$36,948	$1,698	$35,502.22	$34,419	$1,925	$169,910	$158,289	$11,621
Depreciation & Amortization	$65,315	$6,789	$19,655	$919	$18,641.44	$18,271	$1,039	$18,109	$12,122	$5,988
Office Rent & Equipment	$305,182	$31,828	$90,910	$4,140	$87,164.98	$86,442	$4,697	$86,004	$57,460	$28,544
Materials, Postage & Telephone	$30,648	$2,582	$10,152	$385	$10,032.48	$7,064	$431	$6,750	$4,407	$2,343
Miscellaneous Expenses	$3,755	$362	$1,277	$82	$923.41	$1,022	$89	$623	$470	$153
Expenditures	$60,435,299	$5,686,419	$21,256,671	$1,461,235	$14,201,707	$16,252,804	$1,576,462	$8,102,743	$6,512,957	$1,589,786

Expenditures Detail by Function	OPUC Efficiency	New Buildings	Existing Buildings with MF	NEEA Commercial	Industry and Agriculture	Residential	NEEA Residential	OPUC Renewables	Solar	Other Renewables
Program Costs	$56,820,024	$5,346,254	$19,985,084	$1,373,823	$13,352,153	$15,280,552	$1,482,158	$7,618,032	$6,123,348	$1,494,684
Administrative Costs	$3,615,275	$340,165	$1,271,586	$87,412	$849,554.42	$972,252	$94,305	$484,711	$389,609	$95,102
Communications and Outreach	$2,219,537	$208,839	$780,669	$53,665	$521,569.64	$596,898	$57,897	$297,580	$239,194	$58,386
Management & General	$1,395,738	$131,326	$490,917	$33,747	$327,984.77	$375,354	$36,408	$187,131	$150,415	$36,716
Expenditures	$60,435,299	$5,686,419	$21,256,671	$1,461,235	$14,201,707	$16,252,804	$1,576,462	$8,102,743	$6,512,957	$1,589,786

Energy Savings and Generation Detail	OPUC Efficiency	New Buildings	Existing Buildings with MF	NEEA Commercial	Industry and Agriculture	NEEA Industrial	Residential	NEEA Residential	OPUC Renewables	Solar
Electric Savings (kWh) – Annual Goal	172,019,060	45,640,865	37,326,539	7,695,709	42,948,421	2,858,710	21,658,103	13,890,713	-	-
Levelized cost per kWh saved	$0.035	$0.011	$0.054	$0.032	$0.035	$0.000	$0.074	$0.012	-	-
Renewables Generation (kWh) – Annual Goal	-	-	-	-	-	-	-	-	19,629,150	19,629,150
Levelized cost per kWh generated	-	-	-	-	-	-	-	-	$0.030	$0.024
Electric Savings (kWh) – IRP Target	21.18	Included in OPUC Efficiency	Included in OPUC Efficiency	Included in OPUC Efficiency	Included in OPUC Efficiency	Included in OPUC Efficiency	Included in OPUC Efficiency	Included in OPUC Efficiency	-	-

Pacific Power-specific 2024 Budget
2024 Portfolio Level

Financial Overview	OPUC Efficiency	OPUC Renewables	Total for Pacific Power
Beginning Net Assets	$13,020,979	$4,754,820	$17,775,800
Revenue	$56,640,479	$6,378,061	$63,018,540
Expenditures	$68,056,243	$8,316,641	$76,372,884
Net Income	$(11,415,764)	$(1,938,580)	$(13,354,344)
Ending Net Assets	$1,605,216	$2,816,240	$4,421,456
Renewables Funds Dedicated		$200,000	
Renewables Funds Not Dedicated		$2,653,412	

Electric Savings and Generation Overview	OPUC Efficiency	OPUC Renewables	Total for Pacific Power
Electric Savings (kWh) Annual Goal	163,573,898	-	163,573,898
Levelized cost per kWh saved	$0.043	-	$0.043
Renewables Generation (kWh) Annual Goal	-	16,534,750	16,534,750
Levelized cost per kWh generated	-	$0.036	$0.036
Electric Savings (kWh) – IRP target	19.28	-	19.28

2024 Pacific Power-invested Efficiency Funds

Reflects planned investments of a portion of efficiency tariff funds collected by the utility that are in addition to funds received by Energy Trust

Utility-invested Efficiency Funds	OPUC Efficiency
Pacific Power	$2,000,000

Pacific Power-Specific 2024 Program Level

Expenditures Detail	OPUC Efficiency	New Buildings	Existing Buildings with MF	NEEA Commercial	Industry and Agriculture	Residential	NEEA Residential	OPUC Renewables	Solar	Other Renewables
Incentives	$33,890,210	$3,510,393	$9,909,268	-	$10,856,754	$9,613,795	-	$5,073,000	$4,628,000	$445,000
Program Delivery Contractors	$22,960,768	$2,885,025	$8,744,407	$1,544,373	$4,211,385.70	$4,279,078	$1,296,499	$506,214	$402,822	$103,392
Employee Salaries & Fringe Benefits	$5,886,371	$804,376	$1,621,744	$83,822	$1,653,930.14	$1,644,639	$77,860	$1,404,702	$1,023,609	$381,092
Agency Contractor Services	$527,171	$92,704	$199,856	$6,470	$123,504.52	$98,911	$5,727	$147,849	$132,091	$15,758
Planning & Evaluations Services	$1,443,763	$229,039	$404,035	$4,574	$288,907.05	$511,547	$5,661	$74,783	$55,504	$19,279
Advertising & Marketing Services	$1,007,469	$107,022	$290,489	$9,193	$201,919.57	$391,067	$7,779	$202,436	$174,079	$28,357
Other Professional Services	$1,510,036	$146,283	$449,118	$8,606	$354,538.62	$543,791	$7,700	$561,625	$454,342	$107,283
Travel, Meetings, Trainings & Conferences	$197,345	$25,676	$65,212	$2,716	$44,168.65	$57,188	$2,385	$38,792	$30,344	$8,449
Dues, Licenses & Fees	$71,432	$9,808	$29,522	$1,281	$15,113.08	$14,341	$1,367	$20,539	$13,500	$7,039
Software & Hardware	$146,074	$19,227	$40,176	$2,087	$42,733.85	$39,906	$1,945	$183,368	$173,925	$9,443
Depreciation & Amortization	$53,560	$7,023	$14,801	$782	$15,587.49	$14,643	$725	$13,367	$9,999	$3,368
Office Rent & Equipment	$327,029	$43,119	$89,439	$4,590	$94,918.12	$90,679	$4,285	$83,015	$61,994	$21,022
Materials Postage & Telephone	$31,964	$3,431	$9,776	$417	$10,700.17	$7,259	$380	$6,468	$4,685	$1,783
Miscellaneous Expenses	$3,050	$367	$940	$66	$825.64	$795	$57	$483	$392	$91
Expenditures	$68,056,243	$7,883,492	$21,868,782	$1,668,976	$17,914,987	$17,307,637	$1,412,369	$8,316,641	$7,165,285	$1,151,356

Expenditures Detail by Function	OPUC Efficiency	New Buildings	Existing Buildings with MF	NEEA Commercial	Industry and Agriculture	Residential	NEEA Residential	OPUC Renewables	Solar	Other Renewables
Program Costs	$63,984,684	$7,411,851	$20,560,452	$1,569,127	$16,843,198	$16,272,184	$1,327,872	$7,819,087	$6,736,612	$1,082,474
Administrative Costs	$4,071,559	$471,641	$1,308,330	$99,849	$1,071,788.91	$1,035,453	$84,497	$497,555	$428,673	$68,881
Communications and Outreach	$2,468,229	$285,914	$793,126	$60,530	$649,731.50	$627,704	$51,223	$301,624	$259,867	$41,757
Management & General	$1,603,330	$185,726	$515,204	$39,319	$422,057.41	$407,749	$33,274	$195,931	$168,806	$27,125
Expenditures	$68,056,243	$7,883,492	$21,868,782	$1,668,976	$17,914,987	$17,307,637	$1,412,369	$8,316,641	$7,165,285	$1,151,356

Energy Savings and Generation Detail	OPUC Efficiency	New Buildings	Existing Buildings with MF	NEEA Commercial	Industry and Agriculture	NEEA Industrial	Residential	NEEA Residential	OPUC Renewables	Solar	Other Renewables
Electric Savings (kWh) – Annual Goal	163,573,898	20,025,612	39,262,355	7,839,838	53,256,000	2,933,226	$22,366,976	$17,889,890	-	-	-
Levelized cost per kWh saved	$0.043	$0.039	$0.053	$0.036	$0.035	-	$0.074	$0.008	-	-	-
Renewables Generation (kWh) –Annual Goal	-	-	-	-	-	-	-	-	16,534,750	16,504,750	30,000
Levelized cost per kWh generated	-	-	-	-	-	-	-	-	$0.036	$0.031	$2.774
Electric Savings (kWh) – IRP Target	19.28	Included in OPUC Efficiency	Included in OPUC Efficiency	Included in OPUC Efficiency	Included in OPUC Efficiency	Included in OPUC Efficiency	Included in OPUC Efficiency	Included in OPUC Efficiency	-	-	-

Action plan: 2023-2024
NW Natural
Date: December 8, 2022

The following information details key activities planned for NW Natural customers, including joint activities with Energy Trust and NW Natural. The information is not comprehensive of all activities serving NW Natural customers. Activities directed to customers of all gas funding utilities can be found in Energy Trust action plans found in the Action Plan section of the budget packet. Budget tables are inclusive of all revenues, expenditures and energy goals for NW Natural customers.

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Informing the 2023 NW Natural Action Plan

Engagement approach
In alignment with HB 3141, Energy Trust and its utility partners collaborated to co-produce the 2023-2024 Utility-Specific Action Plans. Energy Trust and NW Natural engaged in six utility coordination meetings over the course of the budget and action plan development cycle to discuss activities planned that directly benefit NW Natural customers. In addition, Energy Trust and NW Natural will continue to engage on exploring new areas of work in partnership and supported by the Oregon Public Utility Commission.

Community feedback
Regular updates on budget and planning development were provided to Energy Trust's public advisory council meetings and are described below. Parties were not able to engage communities for early input to budget and planning this year, however community feedback was invited during the budget public comment period from October 5 to 19. Energy Trust and NW Natural will explore ways to engage community stakeholders such as community-based organizations and the environmental justice community starting early in 2023 for the 2024 budget and action planning cycle.

Stakeholder feedback
Throughout 2022, Energy Trust staff consulted with key stakeholders including its three advisory councils, board, Oregon Public Utility Commission and utility partners for information and input to inform its annual business planning, budgeting and action planning process.

Stakeholder and utility engagements to collect input and feedback included:

- Market intelligence gathered from utilities and Energy Trust's Renewable Energy Advisory Council, Conservation Advisory Council and Diversity Advisory Council on market trends, customer needs/barriers, emerging opportunities and strategic priorities in April and May.
    - Additional market intelligence from the field, including input from Program Management Contractors, was gathered by Energy Trust Programs staff.

- Collaborative “Deep Dive” priority topic engagement sessions with Energy Trust’s Renewable Energy Advisory Council, Conservation Advisory Council and Diversity Advisory Council on strategic direction and customer needs in June and July.
- Joint budget planning sessions with utilities in July.
- Quarter two forecast meetings with utilities in August.
- Ongoing utility engagement meetings from August through November.
- Continued engagement with Oregon Public Utility Commission staff from August through December.
- Presentation of highlights from utility-specific plans, in development, to Energy Trust’s Conservation Advisory Council and Renewable Energy Advisory Council in September.
- Energy Trust Board of Directors public budget workshop in October.
- Oregon Public Utility Commission public workshop on Energy Trust’s Budget and Action Plan in November.
- Energy Trust’s public board meeting in December where the final proposed budget and action plan is presented and considered for adoption.

NW Natural-specific 2023 Key Activities

For all key activity areas below, see Energy Trust action plan for activities that will serve across multiple utilities, including NW Natural.

Outreach and community engagement

- Support community-led energy sustainability or climate plan development to identify energy projects in communities including Gresham, Lake Oswego, Oregon City, Tigard, Salem, Hillsboro, Portland and Milwaukie.

Marketing

- Develop annual marketing calendars that include planned Energy Trust-led campaigns to evolve cooperative marketing strategies for high-priority products like gas furnaces, gas fireplaces, hybrid heat pump dual-fuel heating systems and business offers.

Energy efficiency activities

- Existing Buildings: Expand outreach presence and implementation staff outside of the Portland Metro area through community-led efforts.
- Existing Buildings and Production Efficiency: Work with NW Natural to plan gas transport customer service offerings for 2024.
- Support efficiency measures for gas utilities, specifically around gas-fired furnaces and high-efficiency roof-top units.
- Investigate potential for a commercial gas heat pump pilot.
- Explore ways to support Destination Zero activities.

Planning and Evaluation

- Support NW Natural’s Integrated Resource Planning (IRP) process as applicable.
- Work with NW Natural, stakeholders and Oregon Public Utility Commission to quantify blended gas avoided costs to be used in 2024 for 2025 planning and development.
- Develop and refine pipeline reporting tools to support increasingly collaborative budget and forecasting processes with the utilities.
- Develop reporting tools to support the launch, implementation and reporting needs for serving transport gas customers.
- Coordinate with NW Natural on high-level distribution system planning and support targeted load management projects as they emerge.

Targeted initiatives involving joint investment and deployment (e.g., TLM, DR/EE)

- Support NW Natural on identifying and implementing Targeted Load Management projects as appropriate to meet NW Natural's needs.
- Work with NW Natural to add programs to serve their transport customers.

Expected changes for 2024

- None identified at this time

NW Natural-specific 2023 Budget

2023 Portfolio Level

Financial Overview	OPUC Efficiency	Industrial DSM	Washington	Total for NW Natural
Beginning Net Assets	$2,931,041	$1,805,187	$503,112	$5,239,340
Revenue	$28,242,501	$7,231,588	$3,160,185	$38,634,274
Expenditures	$27,684,109	$7,069,120	$3,253,106	$38,006,336
Net Income	$558,392	$162,468	$(92,921)	$627,938
Ending Net Assets	$3,489,433	$1,967,655	$410,191	$5,867,278

Gas Savings Overview	OPUC Efficiency	Industrial DSM	Washington	Total for NW Natural
Gas Savings (therms) Annual Goal	3,390,835	1,634,336	281,908	5,307,079
Levelized cost per therm saved	$0.580	$0.443	$0.933	$0.989
Gas Savings (therms) – IRP target	5,424,114	Included in OPUC Efficiency	371,000	5,795,114

2023 NW Natural-invested Efficiency Funds

Reflects planned investments of a portion of efficiency tariff funds collected by the utility that are in addition to funds received by Energy Trust

NW Natural does not have any planned efficiency efforts with public purpose funds outside of the Energy Trust and low-income programs in 2023.

Utility-invested Tariff Funds	OPUC Efficiency
NW Natural	-

NW Natural-Specific 2023 Program Level

Expenditures Detail	OPUC Efficiency	New Buildings	Existing Buildings with MF	NEEA Commercial	Industry and Agriculture	Residential	NEEA Residential	Washington	Industrial DSM
Incentives	$13,930,770	$552,121	$2,722,253	-	$327,829.10	$10,328,567	-	$1,549,991	$4,156,501
Program Delivery Contractors	$8,989,134	$442,085	$3,221,697	$365,826	$115,140.26	$4,645,559	$198,828	$939,646	$1,776,575
Employee Salaries & Fringe Benefits	$2,351,175	$119,342	$504,523	$19,144	$52,610.48	$1,644,605	$10,951	$464,143	$590,432
Agency Contractor Services	$193,235	$11,622	$70,191	$1,680	$4,050.85	$104,765	$926	$17,776	$63,379
Planning & Evaluations Services	$380,998	$59,947	$126,303	$728	$9,564.17	$183,968	$488	$35,814	$128,810
Advertising & Marketing Services	$670,850	$18,445	$100,417	$2,308	$6,676.80	$541,745	$1,259	$19,012	$95,759
Other Professional Services	$815,472	$17,650	$188,352	$2,287	$10,178.84	$595,721	$1,283	$106,331	$165,402
Travel, Meetings, Trainings & Conferences	$84,322	$3,953	$21,247	$605	$1,412.35	$56,769	$337	$19,073	$20,262
Dues, Licenses & Fees	$28,778	$1,537	$10,571	$319	$511.52	$15,644	$196	$56,756	$8,976
Software & Hardware	$55,926	$2,780	$12,220	$459	$1,341.75	$38,862	$263	$8,989	$14,676
Depreciation & Amortization	$29,689	$1,467	$6,500	$248	$704.42	$20,627	$142	$5,041	$7,753
Office Rent & Equipment	$139,608	$6,877	$30,068	$1,119	$3,294.37	$97,608	$642	$28,239	$36,074
Materials Postage & Telephone	$12,432	$559	$3,359	$104	$379.34	$7,972	$59	$2,065	$4,082
Miscellaneous Expenses	$1,720	$79	$422	$22	$34.75	$1,150	$12	$234	$440
Expenditures	$27,684,109	$1,238,463	$7,018,121	$394,848	$533,729	$18,283,562	$215,386	$3,253,106	$7,069,120

Expenditures Detail by Function	OPUC Efficiency	New Buildings	Existing Buildings with MF	NEEA Commercial	Industry and Agriculture	Residential	NEEA Residential	Washington	Industrial DSM
Program Costs	$26,028,030	$1,164,378	$6,598,293	$371,228	$501,801	$17,189,828	$202,501	$3,058,503	$6,646,241
Administrative Costs	$1,656,080	$74,086	$419,828	$23,620	$31,927.98	$1,093,733	$12,884	$194,603	$422,879
Communications and Outreach	$1,016,722	$45,484	$257,746	$14,501	$19,601.65	$671,479	$7,910	$119,473	$259,619
Management & General	$639,357	$28,602	$162,082	$9,119	$12,326.33	$422,254	$4,974	$75,130	$163,260
Expenditures	$27,684,109	$1,238,463	$7,018,121	$394,848	$533,729	$18,283,562	$215,386	$3,253,106	$7,069,120

Energy Savings Detail	OPUC Efficiency	New Buildings	Existing Buildings with MF	NEEA Commercial	Industry and Agriculture	Residential	Washington	Industrial DSM
Gas Savings (therms) – Annual Goal	3,390,835	274,491	978,913	1,195	225,070	1,911,165	281,908	1,634,336
Levelized cost per therm saved	$0.580	$0.392	$0.640	$25.622	$0.231	$0.606	$0.933	$0.443
Gas Savings (therms) – IRP Target	5,424,114	Included in OPUC efficiency	Included in OPUC efficiency	Included in OPUC efficiency	Included in OPUC efficiency	Included in OPUC efficiency	371,000	Included in OPUC efficiency

NW Natural-specific 2024 Budget

2024 Portfolio Level

Financial Overview	OPUC Efficiency	Industrial DSM	Washington	Total for NW Natural
Beginning Net Assets	$3,489,433	$1,967,655	$410,191	$5,867,278
Revenue	$28,242,501	$7,231,588	$3,160,185	$38,634,274
Expenditures	$29,397,653	$7,742,481	$3,333,856	$40,473,989
Net Income	$(1,155,152)	$(510,893)	$(173,671)	$(1,839,715)
Ending Net Assets	$2,334,281	$1,456,762	$236,520	$4,027,563

Gas Savings Overview	OPUC Efficiency	Industrial DSM	Washington	Total for NW Natural
Gas Savings (therms) Annual Goal	3,780,780	2,108,785	274,871	6,164,436
Levelized cost per therm saved	$0.558	$0.391	$1.001	$0.332
Gas Savings (therms) – IRP target	6,168,755	Included in OPUC efficiency	311,000	6,479,755

2024 NW Natural-invested Efficiency Funds

Reflects planned investments of a portion of efficiency tariff funds collected by the utility that are in addition to funds received by Energy Trust

NW Natural does not have any planned efficiency efforts with public purpose funds outside of the Energy Trust and low-income programs in 2024.

Utility-invested Tariff Funds	OPUC Efficiency
NW Natural	-

NW Natural-Specific 2024 Program Level

Expenditures Detail	OPUC Efficiency	New Buildings	Existing Buildings with MF	NEEA Commercial	Industry and Agriculture	Residential	NEEA Residential	Washington	Industrial DSP
Incentives	$14,837,947	$525,022	$2,916,004	-	$362,909	$11,034,012	-	$1,535,179	$4,870,862
Program Delivery Contractors	$9,519,823	$426,749	$3,738,469	$328,715	$124,950.49	$4,658,033	$242,906	$961,856	$1,723,811
Employee Salaries & Fringe Benefits	$2,619,358	$120,682	$577,049	$17,841	$53,392.87	$1,835,805	$14,588	$526,511	$640,115
Agency Contractor Services	$201,737	$13,888	$71,157	$1,377	$3,985.43	$110,257	$1,073	$25,806	$63,178
Planning & Evaluations Services	$472,711	$53,166	$112,549	$974	$9,830.95	$295,132	$1,061	$33,538	$121,532
Advertising & Marketing Services	$576,937	$16,059	$103,414	$1,957	$6,516.62	$447,534	$1,457	$18,363	$96,070
Other Professional Services	$801,129	$21,897	$160,005	$1,832	$7,739.81	$608,213	$1,443	$105,010	$134,370
Travel, Meetings, Trainings & Conferences	$93,334	$3,856	$23,207	$578	$1,424.52	$63,821	$447	$20,033	$21,338
Dues, Licenses & Fees	$29,008	$1,469	$10,516	$273	$487.90	$16,006	$256	$57,007	$8,706
Software & Hardware	$63,911	$2,885	$14,295	$444	$1,379.70	$44,542	$364	$13,295	$16,199
Depreciation & Amortization	$23,468	$1,054	$5,266	$166	$503.21	$16,342	$136	$4,800	$5,937
Office Rent & Equipment	$144,365	$6,470	$31,826	$977	$3,064.62	$101,225	$803	$29,898	$36,023
Materials Postage & Telephone	$12,598	$516	$3,480	$89	$345.58	$8,098	$71	$2,374	$3,996
Miscellaneous Expenses	$1,326	$55	$334	$14	$26.60	$885	$11	$185	$344
Expenditures	$29,397,653	$1,193,768	$7,767,570	$355,236	$576,557	$19,239,906	$264,615	$3,333,856	$7,742,481

Expenditures Detail by Function	OPUC Efficiency	New Buildings	Existing Buildings with MF	NEEA Commercial	Industry and Agriculture	NEEA Residential	Washington	Industrial DSP
Program Costs	$27,638,897	$1,122,349	$7,302,865	$333,984	$542,064	$18,088,852	$3,134,404	$7,279,276
Administrative Costs	$1,758,755	$71,419	$464,706	$21,253	$34,493.34	$1,151,054	$199,453	$463,205
Communications and Outreach	$1,066,179	$43,295	$281,710	$12,884	$20,910.28	$697,783	$120,911	$280,800
Management & General	$692,576	$28,124	$182,995	$8,369	$13,583.06	$453,271	$78,542	$182,404
Expenditures	$29,397,653	$1,193,768	$7,767,570	$355,236	$576,557	$19,239,906	$3,333,856	$7,742,481

Energy Savings Detail	OPUC Efficiency	New Buildings	Existing Buildings with MF	NEEA Commercial	Industry and Agriculture	Residential	Washington	Industrial DSP
Gas Savings (therms) – Annual Goal	3,780,780	289,593	1,056,470	44,425	248,900	2,141,392	274,871	2,108,785
Levelized cost per therm saved	$0.558	$0.478	$0.665	$0.620	$0.225	$0.569	$1.001	$0.391
Gas Savings (therms) – IRP Target	6,168,755	Included in OPUC efficiency	Included in OPUC efficiency	Included in OPUC efficiency	Included in OPUC efficiency	Included in OPUC efficiency	311,000	Included in OPUC efficiency

Action plan: 2023-2024
Cascade Natural Gas

Date: December 8, 2022

The following information details key activities planned for Cascade Natural Gas customers, including joint activities with Energy Trust and Cascade Natural Gas. The information is not comprehensive of all activities serving Cascade Natural Gas customers. Activities directed to customers of all gas funding utilities can be found in Energy Trust action plans found in the Action Plan section of the budget packet. Budget tables are inclusive of all revenues, expenditures and energy goals for Cascade Natural Gas customers.

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Community feedback

Regular updates on budget and planning development were provided to Energy Trust's public advisory council meetings and are described below. Parties were not able to engage communities for early input to budget and planning this year, however community feedback was invited during the budget public comment period from October 5 to 19. Energy Trust and Cascade Natural Gas will explore ways to engage community stakeholders such as community-based organizations and the environmental justice community starting early in 2023 for the 2024 budget and action planning cycle.

Stakeholder feedback

Throughout 2022, Energy Trust staff consulted with key stakeholders including its three advisory councils, board, Oregon Public Utility Commission and utility partners for information and input to inform its annual business planning, budgeting and action planning process.

Stakeholder and utility engagements to collect input and feedback included:

- Market intelligence gathered from utilities and Energy Trust's Renewable Energy Advisory Council, Conservation Advisory Council and Diversity Advisory Council on market trends, customer needs/barriers, emerging opportunities and strategic priorities in April and May.

    - Additional market intelligence from the field, including input from Program Management Contractors, was gathered by Energy Trust Programs staff.
- Collaborative “Deep Dive” priority topic engagement sessions with Energy Trust’s Renewable Energy Advisory Council, Conservation Advisory Council and Diversity Advisory Council on strategic direction and customer needs in June and July.
- Joint budget planning sessions with utilities in July.
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- Continued engagement with Oregon Public Utility Commission staff from August through December.
- Presentation of highlights from utility-specific plans, in development, to Energy Trust’s Conservation Advisory Council and Renewable Energy Advisory Council in September**.**
- Energy Trust Board of Directors public budget workshop in October.
- Oregon Public Utility Commission public workshop on Energy Trust’s Budget and Action Plan in November.
- Energy Trust’s public board meeting in December where the final proposed budget and action plan is presented and considered for adoption.

Cascade Natural Gas-specific 2023 Key Activities

For all key activity areas below, see Energy Trust action plan for activities that will serve across multiple utilities, including Cascade Natural Gas.

Outreach and community engagement

- Support community-led energy sustainability or climate plan development to identify energy projects in communities including Confederated Tribes of the Umatilla Indian Reservation, Deschutes County and Bend.
- Introduce Resource Assistance for Rural Environments AmeriCorps members to Cascade Natural Gas staff and facilitate information sharing in Deschutes County.
- Explore how to work together on community capacity building efforts such as Energy Trust and Cascade Natural Gas grant or community offers.
- Work with Cascade Natural Gas to develop regional offers and market interventions to simplify participation for rural customers and contractors in Baker, Union and Malheur counties in Eastern Oregon and Klamath county in Southern Oregon.

Marketing

- Develop annual marketing calendars that include planned Energy Trust-led campaigns to evolve cooperative marketing strategies for high-priority products like gas furnaces, gas fireplaces, review hybrid heat pump dual-fuel heating systems, and business offers, as well as special offers for customers in Cascade Natural Gas territory designed to better meet the needs of rural customers.
- Marketing of natural gas heat pump incentives in 2024

Energy efficiency activities

- Existing Buildings: Expand outreach presence and implementation staff in Cascade Natural Gas territory through community-led efforts.
- Production Efficiency and Existing Buildings: Work with Cascade Natural Gas to plan and implement gas transport customer service offerings. Cascade Natural Gas will start with carbon compliance audits offered through a third party and follow up with leveraging Energy Trust offerings to support efficiency opportunities for the transport customers.
- Exploring natural gas heat pump incentives in 2024
- Support efficiency measures for gas utilities, specifically around gas-fired furnaces and high-efficiency roof-top units.

Planning and Evaluation

- Support Cascade Natural Gas's Integrated Resource Planning (IRP) process as applicable
- Explore natural gas heat pump measure/incentives in 2024
- Work with Cascade Natural Gas, stakeholders and Oregon Public Utility Commission to quantify blended gas avoided costs to be used in 2024 for 2025 planning and development.
- Develop and refine pipeline reporting tools to support increasingly collaborative budget and forecasting processes with Cascade Natural Gas.
- Develop reporting tools to support the launch, implementation and reporting needs for serving gas transport customers.

Targeted initiatives involving joint investment and deployment (e.g., TLM, DR/EE)

- Support Cascade Natural Gas on identifying and implementing a Targeted Load Management project as appropriate to meet Cascade Natural Gas's needs. Work with Cascade Natural Gas on planning to add programs to serve Cascade Natural Gas's transport customers in late 2023 or early 2024

Expected changes for 2024

- None identified at this time

Cascade Natural Gas-specific 2023 Budget

2023 Portfolio Level

Financial Overview	OPUC Efficiency	Total for Cascade Natural Gas
Beginning Net Assets	$3,859,185	$3,859,185
Revenue	$3,267,473	$3,267,473
Expenditures	$4,414,469	$4,414,469
Net Income	$(1,146,996)	$(1,146,996)
Ending Net Assets	$2,712,189	$2,712,189

Gas Savings Overview	OPUC Efficiency	Total for Cascade Natural Gas
Gas Savings (therms) Annual Goal	581,032	581,032
Levelized cost per therm saved	$0.641	$0.641
Gas Savings (therms) – IRP target	688,176	688,176

2023 Cascade Natural Gas-invested Efficiency Funds

Reflects planned investments of a portion of tariff funds collected by the utility that are in addition to funds received by Energy Trust

Utility-invested Tariff Funds	OPUC Efficiency
Cascade Natural Gas Transport	$270,000

Cascade Natural Gas-specific 2023 Program Level

Expenditures Detail	OPUC Efficiency	New Buildings	Existing Buildings with MF	NEEA Commercial	Industry and Agriculture	Residential	NEEA Residential
Incentives	$2,050,188	$74,637	$686,659	-	$267,426.20	$1,021,466	-
Program Delivery Contractors	$1,639,998	$59,762	$812,638	$104,258	$155,772.67	$450,903	$56,665
Employee Salaries & Fringe Benefits	$363,513	$16,117	$127,251	$5,456	$50,262.39	$161,305	$3,121
Agency Contractor Services	$34,161	$1,570	$17,704	$479	$3,870.06	$10,275	$264
Planning & Evaluations Services	$66,006	$7,963	$31,750	$208	$9,137.31	$16,808	$139
Advertising & Marketing Services	$85,896	$2,491	$25,327	$658	$6,378.80	$50,683	$359
Other Professional Services	$119,061	$2,384	$47,506	$652	$9,724.54	$58,429	$366
Travel, Meetings, Trainings & Conferences	$13,078	$534	$5,359	$172	$1,349.31	$5,568	$96
Dues, Licenses & Fees	$5,044	$208	$2,666	$91	$488.69	$1,534	$56
Software & Hardware	$8,757	$375	$3,082	$131	$1,281.87	$3,812	$75
Depreciation & Amortization	$4,645	$198	$1,639	$71	$672.98	$2,023	$40
Office Rent & Equipment	$21,735	$929	$7,584	$319	$3,147.34	$9,574	$183
Materials Postage & Telephone	$2,113	$75	$847	$30	$362.41	$782	$17
Miscellaneous Expenses	$273	$11	$106	$6	$33.20	$113	$3
Expenditures	$4,414,469	$167,253	$1,770,120	$112,529	$509,908	$1,793,274	$61,384

Expenditures Detail by Function	OPUC Efficiency	New Buildings	Existing Buildings with MF	NEEA Commercial	Industry and Agriculture	Residential	NEEA Residential
Program Costs	$4,150,393	$157,248	$1,664,231	$105,798	$479,405	$1,686,000	$57,712
Administrative Costs	$264,076	$10,005	$105,890	$6,732	$30,502.98	$107,275	$3,672
Communications and Outreach	$162,125	$6,143	$65,009	$4,133	$18,726.79	$65,860	$2,254
Management & General	$101,951	$3,863	$40,880	$2,599	$11,776.19	$41,415	$1,418
Expenditures	$4,414,469	$167,253	$1,770,120	$112,529	$509,908	$1,793,274	$61,384

Energy Savings Detail	OPUC Efficiency	New Buildings	Existing Buildings with MF	NEEA Commercial	Industry and Agriculture	Residential	NEEA Residential
Gas Savings (therm) – Annual Goal	581,032	28,871	261,019	341	105,094	185,708	-
Levelized cost per therm saved	$0.641	$0.497	$0.804	$25.589	$0.489	$0.609	-
Gas Savings (therm) – IRP Target	688,176	Included in OPUC Efficiency	Included in OPUC Efficiency	Included in OPUC Efficiency	Included in OPUC Efficiency	Included in OPUC Efficiency	Included in OPUC Efficiency

Cascade Natural Gas-specific 2024 Budget

2024 Portfolio Level

Financial Overview	OPUC Efficiency	Total for Cascade Natural Gas
Beginning Net Assets	$2,712,189	$2,712,189
Revenue	$3,267,473	$3,267,473
Expenditures	$4,744,288	$4,744,288
Net Income	$(1,476,815)	$(1,476,815)
Ending Net Assets	$1,235,374	$1,235,374

Gas Savings Overview	OPUC Efficiency	Total for Cascade Natural Gas
Gas Savings (therms) Annual Goal	656,641	656,641
Levelized cost per therm saved	$0.620	$0.620
Gas Savings (therms) – IRP target	769,573	769,573

2024 Cascade Natural Gas-invested Efficiency Funds

Reflects planned investments of a portion of tariff funds collected by the utility that are in addition to funds received by Energy Trust

Utility-invested Tariff Funds	OPUC Efficiency
Cascade Natural Gas Transport	$738,642

Cascade Natural Gas-specific 2024 Program Level

Expenditures Detail	OPUC Efficiency	New Buildings	Existing Buildings with MF	NEEA Commercial	Industry and Agriculture	Residential	NEEA Residential
Incentives	$2,175,690	$68,666	$771,337	-	$263,823.00	$1,071,864	-
Program Delivery Contractors	$1,816,194	$55,813	$988,894	$93,682	$164,928.23	$443,649	$69,227
Employee Salaries & Fringe Benefits	$401,129	$15,737	$152,613	$5,085	$46,923.88	$176,613	$4,157
Agency Contractor Services	$35,438	$1,811	$18,819	$392	$3,502.56	$10,607	$306
Planning & Evaluations Services	$70,166	$6,568	$29,448	$277	$8,639.85	$24,930	$302
Advertising & Marketing Services	$76,794	$2,094	$27,350	$558	$5,727.08	$40,650	$415
Other Professional Services	$111,420	$2,855	$42,317	$522	$6,802.07	$58,513	$411
Travel, Meetings, Trainings & Conferences	$14,324	$503	$6,138	$165	$1,251.93	$6,140	$127
Dues, Licenses & Fees	$5,092	$192	$2,781	$78	$428.78	$1,540	$73
Software & Hardware	$9,885	$376	$3,781	$127	$1,212.54	$4,285	$104
Depreciation & Amortization	$3,631	$137	$1,393	$47	$442.24	$1,572	$39
Office Rent & Equipment	$22,199	$844	$8,417	$278	$2,693.32	$9,738	$229
Materials Postage & Telephone	$2,116	$67	$920	$25	$303.71	$779	$20
Miscellaneous Expenses	$211	$7	$88	$4	$23.37	$85	$3
Expenditures	$4,744,288	$155,671	$2,054,296	$101,240	$506,703	$1,850,965	$75,414

Expenditures Detail by Function	OPUC Efficiency	New Buildings	Existing Buildings with MF	NEEA Commercial	Industry and Agriculture	Residential	NEEA Residential
Program Costs	$4,460,455	$146,358	$1,931,395	$95,183	$476,388	$1,740,229	$70,902
Administrative Costs	$283,834	$9,313	$122,901	$6,057	$30,314.18	$110,737	$4,512
Communications and Outreach	$172,063	$5,646	$74,504	$3,672	$18,376.83	$67,130	$2,735
Management & General	$111,770	$3,667	$48,397	$2,385	$11,937.36	$43,607	$1,777
Expenditures	$4,744,288	$155,671	$2,054,296	$101,240	$506,703	$1,850,965	$75,414

Energy Savings Detail	OPUC Efficiency	New Buildings	Existing Buildings with MF	NEEA Commercial	Industry and Agriculture	Residential	NEEA Residential
Gas Savings (therm) – Annual Goal	656,641	38,577	303,714	12,661	93,300	208,389	-
Levelized cost per therm saved	$0.620	$0.511	$0.830	$0.620	$0.533	$0.559	-
Gas Savings (therm) – IRP Target	769,573	Included in OPUC Efficiency	Included in OPUC Efficiency	Included in OPUC Efficiency	Included in OPUC Efficiency	Included in OPUC Efficiency	Included in OPUC Efficiency

Action plan: 2023-2024
Avista
Date: December 8, 2022

The following information details key activities planned for Avista customers, including joint activities with Energy Trust and Avista. The information is not comprehensive of all activities serving Avista customers. Activities directed to customers of all gas funding utilities can be found in Energy Trust action plans found in the Action Plan section of the budget packet. Budget tables are inclusive of all revenues, expenditures and energy goals for Avista customers.

Contents

Informing the 2023 Avista Action Plan

Engagement approach
In alignment with HB 3141, Energy Trust and its utility partners collaborated to co-produce the 2023-2024 Utility-Specific Action Plans. Energy Trust and Avista engaged in six utility coordination meetings over the course of the budget and action plan development cycle to discuss activities planned that directly benefit Avista customers. In addition, Energy Trust and Avista will continue to engage on exploring new areas of work in partnership and supported by the Oregon Public Utility Commission including developing a new hybrid heating solution and beginning to serve gas interruptible customers. Collaboration will also center on strategies to serve customers with high energy burdens.

Community feedback
Regular updates on budget and planning development were provided to Energy Trust's public advisory council meetings and are described below. Parties were not able to engage communities for early input to budget and planning this year, however community feedback was invited during the budget public comment period from October 5 to 19. Energy Trust and Avista will explore ways to engage community stakeholders such as community-based organizations and the environmental justice community starting early in 2023 for the 2024 budget and action planning cycle.

Stakeholder feedback
Throughout 2022, Energy Trust staff consulted with key stakeholders including its three advisory councils, board, Oregon Public Utility Commission and utility partners for information and input to inform its annual business planning, budgeting and action planning process.

Stakeholder and utility engagements to collect input and feedback included:

- Market intelligence gathered from utilities and Energy Trust's Renewable Energy Advisory Council, Conservation Advisory Council and Diversity Advisory Council on market trends, customer needs/barriers, emerging opportunities and strategic priorities in April and May.

    - Additional market intelligence from the field, including input from Program Management Contractors, was gathered by Energy Trust Programs staff.
- Collaborative “Deep Dive” priority topic engagement sessions with Energy Trust’s Renewable Energy Advisory Council, Conservation Advisory Council and Diversity Advisory Council on strategic direction and customer needs in June and July.
- Joint budget planning sessions with utilities in July.
- Quarter two forecast meetings with utilities in August.
- Ongoing utility engagement meetings from August through November.
- Continued engagement with Oregon Public Utility Commission staff from August through December.
- Presentation of highlights from utility-specific plans, in development, to Energy Trust’s Conservation Advisory Council and Renewable Energy Advisory Council in September**.**
- Energy Trust Board of Directors public budget workshop in October.
- Oregon Public Utility Commission public workshop on Energy Trust’s Budget and Action Plan in November.
- Energy Trust’s public board meeting in December where the final proposed budget and action plan is presented and considered for adoption.

Avista-specific 2023 Key Activities

For all key activity areas below, see Energy Trust action plan for activities that will serve across multiple utilities, including Avista.

Outreach and community engagement

- Support community-led energy sustainability or climate plan development to identify energy projects in communities including Grants Pass.
- Introduce Resource Assistance for Rural Environments AmeriCorps members to Avista staff and facilitate information sharing in Klamath Falls, Jackson County and Grants Pass.
- Explore how to work together on community capacity building efforts such as Energy Trust and Avista grant or community offers.
- Continue to serve as point of contact to communities rebuilding from the 2020 Labor Day fires and provide support to recovery efforts by individual customers, businesses, cities, counties, long-term recovery groups and nonprofits.
- Work with Avista to develop regional offers and market interventions to simplify participation for rural customers and contractors in Union county in Eastern Oregon and Klamath county in Southern Oregon.

Marketing

- Develop annual marketing calendars that include planned Energy Trust-led campaigns to evolve cooperative marketing strategies for high-priority products like gas furnaces, gas fireplaces and gas water heating systems, as well as special offers for customers in Avista territory designed to better meet the needs of rural audiences.

Energy efficiency activities

- Existing Buildings: Expand outreach presence and implementation staff in Avista service area.
- Production Efficiency and Existing Buildings: Work with Avista to plan and implement gas interruptible customers service offerings.
- Continue offering increased incentives for energy modeling in fire-affected communities in the Avista service area.
- Support efficiency measures for gas utilities, specifically around gas-fired furnaces and high-efficiency roof-top units.

Planning and Evaluation

- Support Avista's Integrated Resource Planning (IRP) process as applicable.
- Work with Avista, stakeholders and Oregon Public Utility Commission to quantify blended gas avoided costs to be used in 2024 for 2025 planning and development.
- Develop reporting tools to support the launch, implementation and reporting needs for serving interruptible gas customers.

Targeted initiatives involving joint investment and deployment (e.g., TLM, DR/EE)

- Support Avista on identifying and implementing a Targeted Load Management project as appropriate to meet Avista's needs.
- Work with Avista to add programs to serve Avista's interruptible customers in 2023.
- Collaborate with Avista, Oregon Public Utility Commission and other stakeholders to add programs to serve Avista's transport customers mid-2023 or 2024.
- Engage Avista, Oregon Public Utility Commission and other stakeholders to further refine a hybrid heating system pilot.

Expected changes for 2024

- Coordinate with Avista on high-level distribution system planning and support targeted load management projects as they emerge.

Avista-specific 2023 Budget

2023 Portfolio Level

Financial Overview	OPUC Efficiency	Interruptible	Total for Avista
Beginning Net Assets	$2,850,330	-	$2,850,330
Revenue	$2,193,292	$310,000	$2,503,292
Expenditures	$3,366,873	$210,385	$3,577,258
Net Income	$(1,173,581)	$99,615	$(1,073,966)
Ending Net Assets	$1,676,749	$99,615	$1,776,364

Gas Savings Overview	OPUC Efficiency	Interruptible	Total for Avista
Gas Savings (therms) Annual Goal	427,269	15,872	443,141
Levelized cost per therm saved	$0.555	$0.759	$0.572
Gas Savings (therms) – IRP target	527,675	-	527,675

2023 Avista-invested Efficiency Funds

Reflects planned investments of a portion of tariff funds collected by the utility that are in addition to funds received by Energy Trust

Utility-invested Tariff Funds	OPUC Tariff
Avista transport	$250,000

Avista-specific 2023 Program Level

Expenditures Detail	OPUC Efficiency	New Buildings	Existing Buildings with MF	NEEA Commercial	Industry and Agriculture	Residential	NEEA Residential	Interruptible
Incentives	$1,640,810	$52,135	$401,824	-	$145,018	$1,041,832	-	$84,140
Program Delivery Contractors	$1,161,787	$41,745	$475,545	$65,014	$48,662	$495,485	$35,335	$93,599
Employee Salaries & Fringe Benefits	$282,496	$11,258	$74,466	$3,402	$23,003	$168,420	$1,946	$15,840
Agency Contractor Services	$24,419	$1,096	$10,360	$299	$1,771	$10,729	$165	$2,039
Planning & Evaluations Services	$46,090	$5,563	$18,580	$129	$4,182	$17,549	$87	$3,773
Advertising & Marketing Services	$73,033	$1,740	$14,821	$410	$2,919	$52,919	$224	$2,962
Other Professional Services	$95,557	$1,665	$27,800	$406	$4,451	$61,006	$228	$5,438
Travel, Meetings, Trainings & Conferences	$10,107	$373	$3,136	$107	$618	$5,814	$60	$627
Dues, Licenses & Fees	$3,622	$145	$1,560	$57	$224	$1,602	$35	$302
Software & Hardware	$6,761	$262	$1,804	$82	$587	$3,980	$47	$387
Depreciation & Amortization	$3,588	$138	$959	$44	$308	$2,112	$25	$205
Office Rent & Equipment	$16,836	$649	$4,438	$199	$1,440	$9,996	$114	$952
Materials Postage & Telephone	$1,560	$53	$496	$19	$166	$816	$10	$107
Miscellaneous Expenses	$209	$7	$62	$4	$15	$118	$2	$13
Expenditures	$3,366,873	$116,829	$1,035,852	$70,172	$233,364	$1,872,378	$38,278	$210,385

Expenditures Detail by Function	OPUC Efficiency	New Buildings	Existing Buildings with MF	NEEA Commercial	Industry and Agriculture	Residential	NEEA Residential	Interruptible
Program Costs	$3,165,465	$109,840	$973,886	$65,974	$219,404	$1,760,372	$35,988	$197,800
Administrative Costs	$201,408	$6,989	$61,965	$4,198	$13,960	$112,007	$2,290	$12,585
Communications and Outreach	$123,651	$4,291	$38,043	$2,577	$8,570	$68,765	$1,406	$7,727
Management & General	$77,757	$2,698	$23,923	$1,621	$5,389	$43,242	$884	$4,859
Expenditures	$3,366,873	$116,829	$1,035,852	$70,172	$233,364	$1,872,378	$38,278	$210,385

Energy Savings Detail	OPUC Efficiency	New Buildings	Existing Buildings with MF	NEEA Commercial	Industry and Agriculture	Residential	Interruptible
Gas Savings (therms) – Annual Goal	427,269	32,750	113,893	212	55,338	225,076	15,872
Levelized cost per therm saved	$0.555	$0.294	$0.739	$25.667	$0.385	$0.527	$0.759
Gas Savings (therms) – IRP Target	527,675	Included in OPUC Efficiency	Included in OPUC Efficiency	Included in OPUC Efficiency	Included in OPUC Efficiency	Included in OPUC Efficiency	-

Avista-specific 2024 Budget

2024 Portfolio Level

Financial Overview	OPUC Efficiency	Interruptible	Total for Avista
Beginning Net Assets	$1,676,749	$99,615	$1,776,364
Revenue	$2,193,292	$310,000	$2,503,292
Expenditures	$3,362,361	$306,700	$3,669,061
Net Income	$(1,169,069)	$3,300	$(1,165,769)
Ending Net Assets	$507,680	$102,915	$610,594

Gas Savings Overview	OPUC Efficiency	Interruptible	Total for Avista
Gas Savings (therms) Annual Goal	460,068	48,692	508,761
Levelized cost per therm saved	$0.528	$7.107	$0.534
Gas Savings (therms) – IRP target	544,944	-	544,944

2024 Avista-invested Efficiency Funds

Reflects planned investments of a portion of efficiency tariff funds collected by the utility that are in addition to funds received by Energy Trust

Utility-invested Tariff Funds	OPUC Efficiency
Avista transport	$684,830

Avista-specific 2024 Program Level

Expenditures Detail	OPUC Efficiency	New Buildings	Existing Buildings with MF	NEEA Commercial	Industry and Agriculture	Residential	NEEA Residential	Interruptible
Incentives	$1,613,138	$35,737	$413,259	-	$55,241	$1,108,901	-	$125,533
Program Delivery Contractors	$1,194,592	$29,048	$529,820	$58,419	$36,594	$497,542	$43,169	$136,980
Employee Salaries & Fringe Benefits	$292,979	$8,190	$81,765	$3,171	$10,051	$187,209	$2,592	$23,271
Agency Contractor Services	$23,454	$943	$10,083	$245	$750	$11,244	$191	$2,750
Planning & Evaluations Services	$47,833	$3,418	$15,778	$173	$1,851	$26,425	$188	$4,469
Advertising & Marketing Services	$60,665	$1,090	$14,653	$348	$1,227	$43,089	$259	$4,030
Other Professional Services	$88,221	$1,486	$22,672	$326	$1,457	$62,024	$256	$6,127
Travel, Meetings, Trainings & Conferences	$10,509	$262	$3,288	$103	$268	$6,508	$79	$903
Dues, Licenses & Fees	$3,408	$100	$1,490	$48	$92	$1,632	$46	$402
Software & Hardware	$7,167	$196	$2,026	$79	$260	$4,542	$65	$579
Depreciation & Amortization	$2,633	$72	$746	$30	$95	$1,667	$24	$213
Office Rent & Equipment	$16,164	$439	$4,510	$174	$577	$10,323	$143	$1,289
Materials Postage & Telephone	$1,447	$35	$493	$16	$65	$826	$13	$141
Miscellaneous Expenses	$151	$4	$47	$2	$5	$90	$2	$13
Expenditures	$3,362,361	$81,019	$1,100,629	$63,132	$108,532	$1,962,022	$47,027	$306,700

Expenditures Detail by Function	OPUC Efficiency	New Buildings	Existing Buildings with MF	NEEA Commercial	Industry and Agriculture	Residential	NEEA Residential	Interruptible
Program Costs	$3,161,204	$76,172	$1,034,783	$59,355	$102,039	$1,844,642	$44,214	$288,351
Administrative Costs	$201,158	$4,847	$65,847	$3,777	$6,493	$117,381	$2,813	$18,349
Communications and Outreach	$121,944	$2,938	$39,917	$2,290	$3,936	$71,158	$1,706	$11,123
Management & General	$79,214	$1,909	$25,930	$1,487	$2,557	$46,223	$1,108	$7,226
Expenditures	$3,362,361	$81,019	$1,100,629	$63,132	$108,532	$1,962,022	$47,027	$306,700

Energy Savings Detail	OPUC Efficiency	New Buildings	Existing Buildings with MF	NEEA Commercial	Industry and Agriculture	Residential	NEEA Residential	Interruptible
Gas Savings (therms) – Annual Goal	460,068	46,719	133,517	7,895	14,820	257,117	-	48,692
Levelized cost per therm saved	$0.528	$0.265	$0.696	$0.620	$0.606	$0.489	-	$7.107
Gas Savings (therms) – IRP Target	544,944	Included in OPUC Efficiency	Included in OPUC Efficiency	Included in OPUC Efficiency	Included in OPUC Efficiency	Included in OPUC Efficiency	Included in OPUC Efficiency	-