# *MEMO*

**Date:** November 9, 2011
**To:** Board of Directors
**From:** Philipp Degens, Evaluation Manager
Marshall Johnson, Residential Sector Manager
**Subject:** Staff response memo: Clean Energy Works: Portland Pilot Process Evaluation 2011

Clean Energy Works: Portland Pilot (CEWP) has been underway for over two years. The pilot has been evaluated at many stages and this is the final process evaluation of the pilot as it has now transitioned into Clean Energy Works Oregon (CEWO). The pilot clearly succeeded in:

- Proving the feasibility of on-bill financing
- Showing that on-bill financing combined with the more in-depth engagement of Energy Advisors in project facilitation could lead to comprehensive retrofits
- Achieving its goal of having 500 customers make significant energy efficiency investments in their home

Participant surveys have shown that customers are highly satisfied with the CEWP provided efficiency and financial services, both in the short and long run (one year after retrofit).

One opportunity that CEWO clearly needs to address is connecting the applicants that do not move forward with CEWO with appropriate information and services that can help them move forward on energy efficiency improvements. In CEWP about 3 out of 4 applicants did not end up completing a CEWP project, even though most had efficiency improvements in mind when applying. Many that did complete a project without CEWP did not make use of Energy Trust programs that they were eligible for.

Given the Energy Trust investments in developing and supporting CEWO, it would be advantageous to develop processes to quickly identify customers where CEWO service benefits are limited. Customers, who are interested in only small projects or have specific housing characteristics (e.g., newer homes), are examples of such marginal candidates. Faster identification of appropriate services for each applicant will allow CEWO to focus on those customers that will benefit from CEWO's services. Customers will benefit by being matched to services and information that are appropriate for their size project, financial preferences and housing circumstances.

Energy Trust will continue evaluating CEWO as required by the EEAST legislation. This on–going evaluation will include an impact evaluation analyzing electric and gas consumption that will be completed in 2012. The process evaluation will continue to monitor the expansion of the program to other regions of Oregon and other sectors, and provide customer feedback on the services as they evolve.