



Energy Trust 2010 Results & 2011 Plans

March 2011

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Energy Program Director





Final 2010 Results

| Utility | 2010 Pre True Up | 2010 Post True Up | 2010 Budget Stretch Goal | % of 2010 Stretch (Post True Up) |
|---------------------|------------------|-------------------|--------------------------|----------------------------------|
| Pacific Power | 19.55 | 20.04 | 17.84 | 112% |
| PGE | 24.96 | 25.60 | 27.14 | 94% |
| Cascade Natural Gas | 366,596 | 367,876 | 473,347 | 78% |
| NW Natural* | 4,208,263 | 4,254,907 | 4,325,847 | 98% |

Savings/Generation Goals & Budget Comparison

| Program Name | 2011 Stretch Goals | | 2010 & 2011 Budgets | | |
|---------------------------|--------------------|-----------------|---------------------|-------------|----------|
| | aMW | Mill Ann Therms | 2010 Budget | 2011 Budget | % Change |
| Existing Buildings | 11.9 | 1.2 | \$26.61 | \$35.19 | 32.2% |
| New Buildings | 2.9 | 0.6 | 14.3 | 11.7 | -16.6% |
| Existing Homes | 6.0 | 1.8 | 22.59 | 26.94 | 19.2% |
| New Homes and Products | 6.0 | 0.4 | 17.59 | 21.09 | 19.9% |
| Production Efficiency | 13.7 | 0.7 | 21.74 | 27.83 | 28.0% |
| NEEA | 3.9 | | 6.51 | 8.15 | 25.2% |
| Gas Market Transformation | | 0.5 | | | |
| Solar | 1.3 | | 19.89 | 12.41 | -37.6% |
| Biopower | 3.3 | | 5.97 | 5.18 | -13.1% |
| Other Renew | 1.3 | | 4.69 | 6.51 | 41.4% |

Business Sector Activities

Accelerate energy efficiency and renewable investment

Ensure programs meet customers' needs

Ensure goals are met cost effectively and that energy savings are real and verifiable

Business Sector Areas of Focus

Ensure code based market transformational savings

Work with large customers to develop long-term portfolio plans that enable deeper savings

Provide measures and services that allow smaller customers to invest in energy efficiency and renewable projects that meet their cost constraints



Industry and Agricultural Sector Activities

Increase participation by smaller industrial and agricultural businesses

Maintain high level of customer service and participant satisfaction

Achieve high technical realization of savings

Industry and Agricultural Sector Areas of Focus

Maximize current successful approaches to working on both custom and calculated savings projects

Drive and develop innovative offerings to cultivate more savings through O&M and behavioral changes, including strategic energy management, Kaizen Blitz & others

Make it easy for customers to implement energy-savings projects by providing expert technical services and delivering them efficiently



Homes Sector Activities

Establish a deep understanding of customers

Grow effective delivery network and simplify processes

Work effectively with key constituents

Homes Sector Areas of Focus

Accelerate energy efficiency investments—emphasize customer engagement

Transition to new codes

Work upstream with distributors and infrastructure

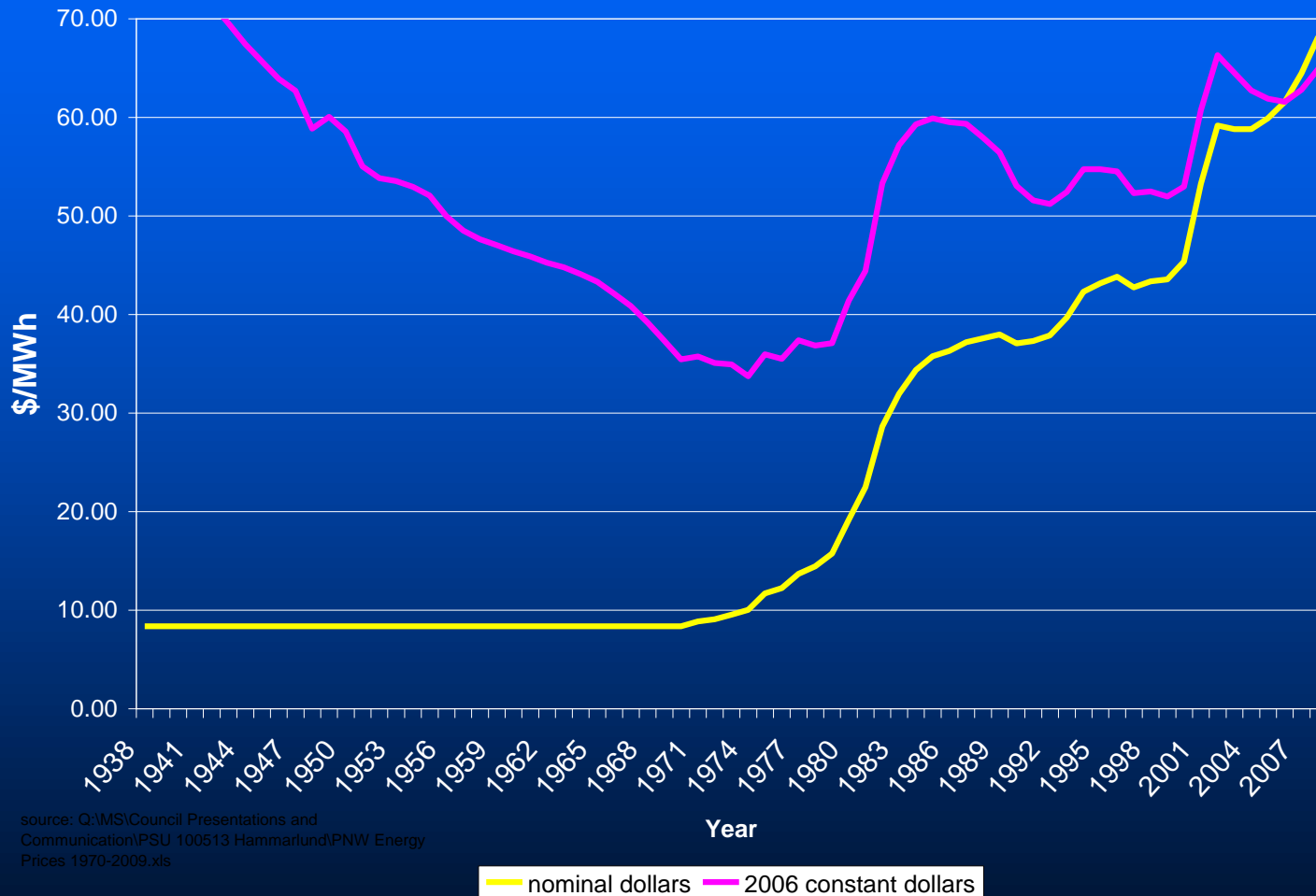
Accelerate engagement with market-realtors, EPS, trade allies

Educate consumers to drive behavior change



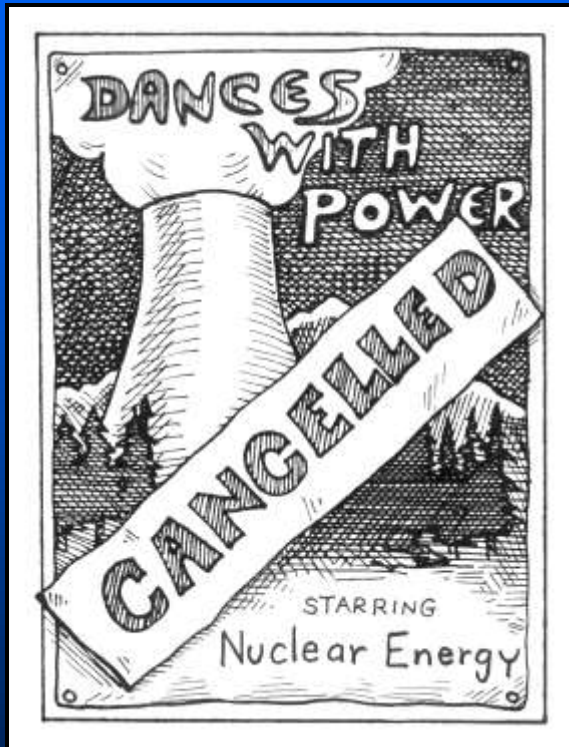
Why Energy Efficiency?

1. Electricity costs rose dramatically, beginning in the 1970s



Why Energy Efficiency?

2. The central issues were the future cost and sources of power



- Thermal power plants then under construction were terminated because of cost overruns and faulty demand forecasts (overestimated demand, underestimated costs)
- At the same time, salmon runs were declining; Columbia and Snake dams got most of the blame



Why Energy Efficiency?

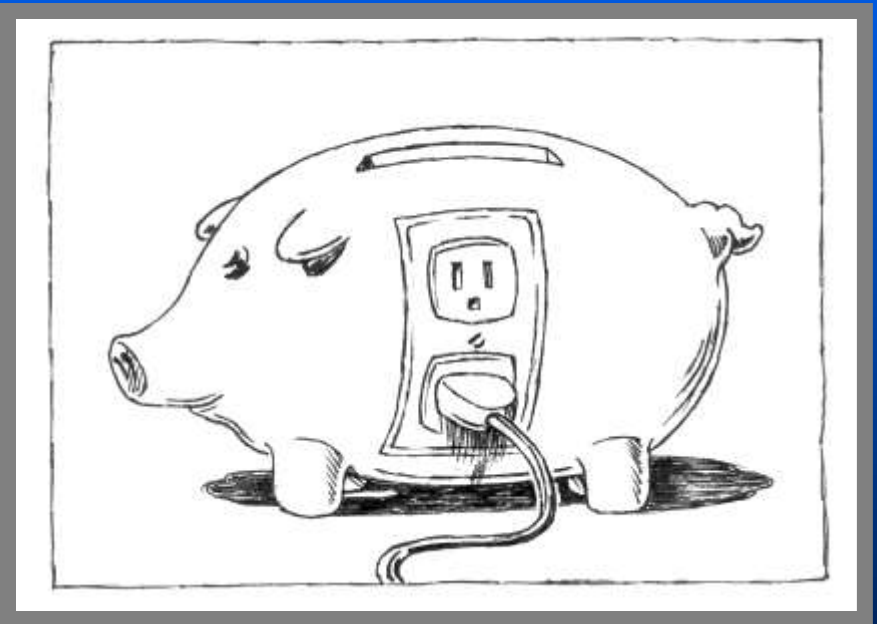
3. Congress responded with the Northwest Power Act of 1980

- A federal law authorizing ID, OR, MT, and WA to form an “interstate compact,” The Northwest Power and Conservation Council
- The law directs the Council to develop a 20-year demand forecast and a resource plan and update it every five years
- The law says the plan shall include the **least-cost** mix of resources
- Efficiency is the **lowest-cost resource**, and so it is the **highest-priority resource** in the law; the law treats it as equivalent to generation and gives it a 10-percent price advantage
- By law, the plan includes a fish and wildlife program to mitigate the damage done by hydropower dams
- Federal agencies, primarily Bonneville Power Administration, implement the plan and program

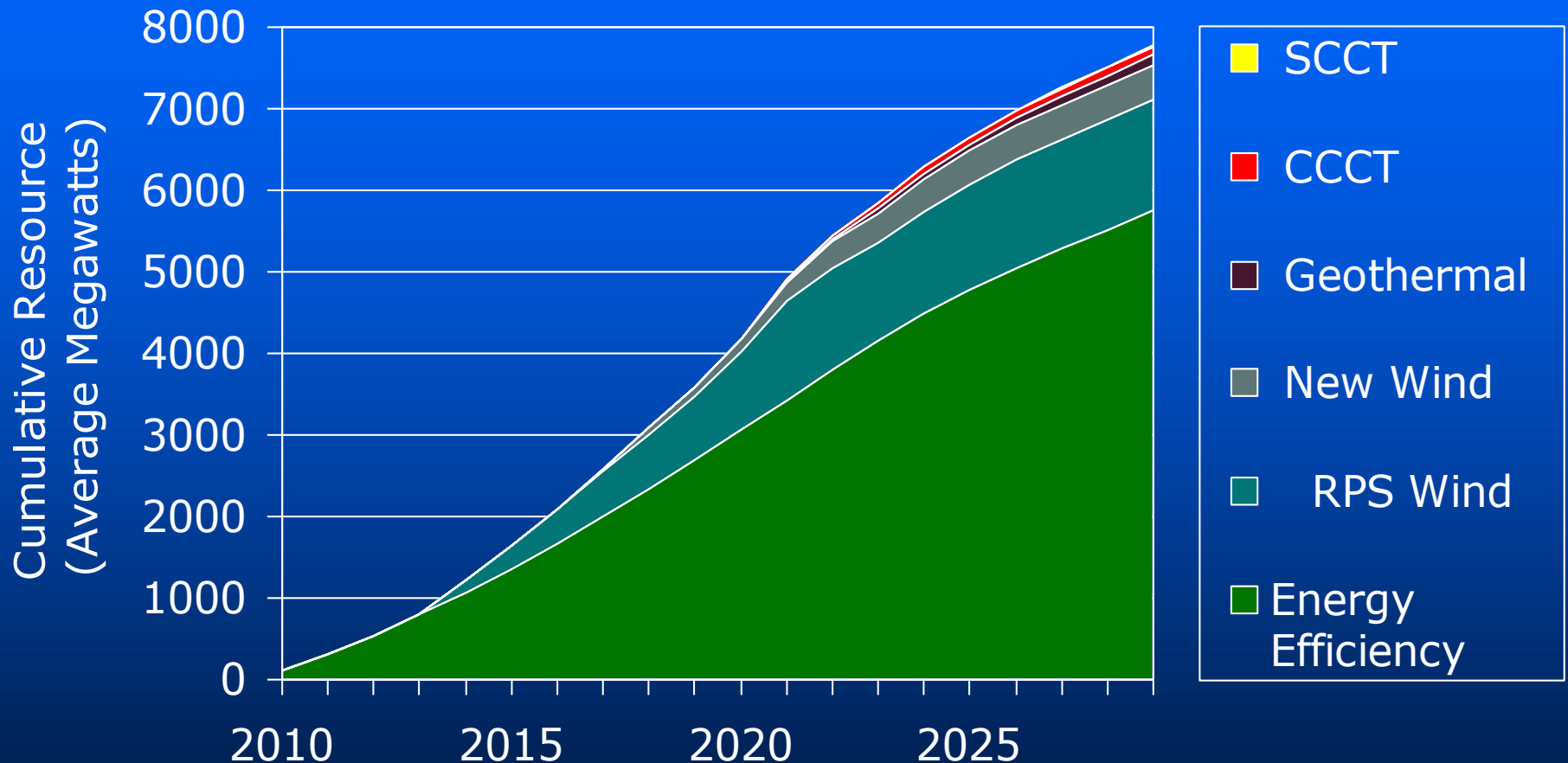
Why Energy Efficiency?

4. The goal is to keep energy affordable, reliable, efficient

- Energy efficiency is less than half the cost of generation: \$30-\$40 per megawatt-hour versus \$90 to \$120+
- Efficiency mitigates the risks of volatile fuel prices and unknown carbon costs
- Efficiency has no fuel or transmission costs

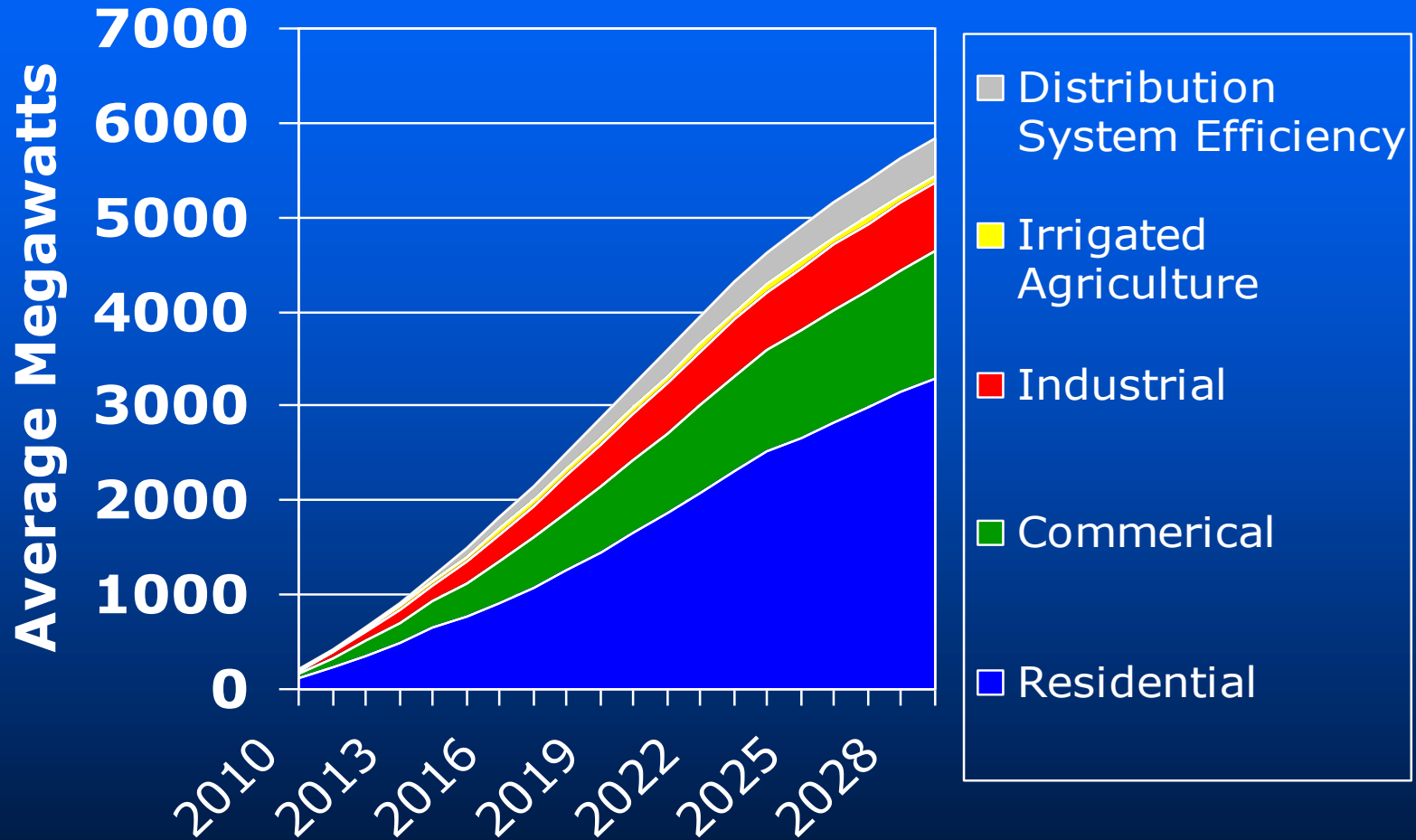


6th NW Power Plan, 2010: 20-year Resource Portfolio*

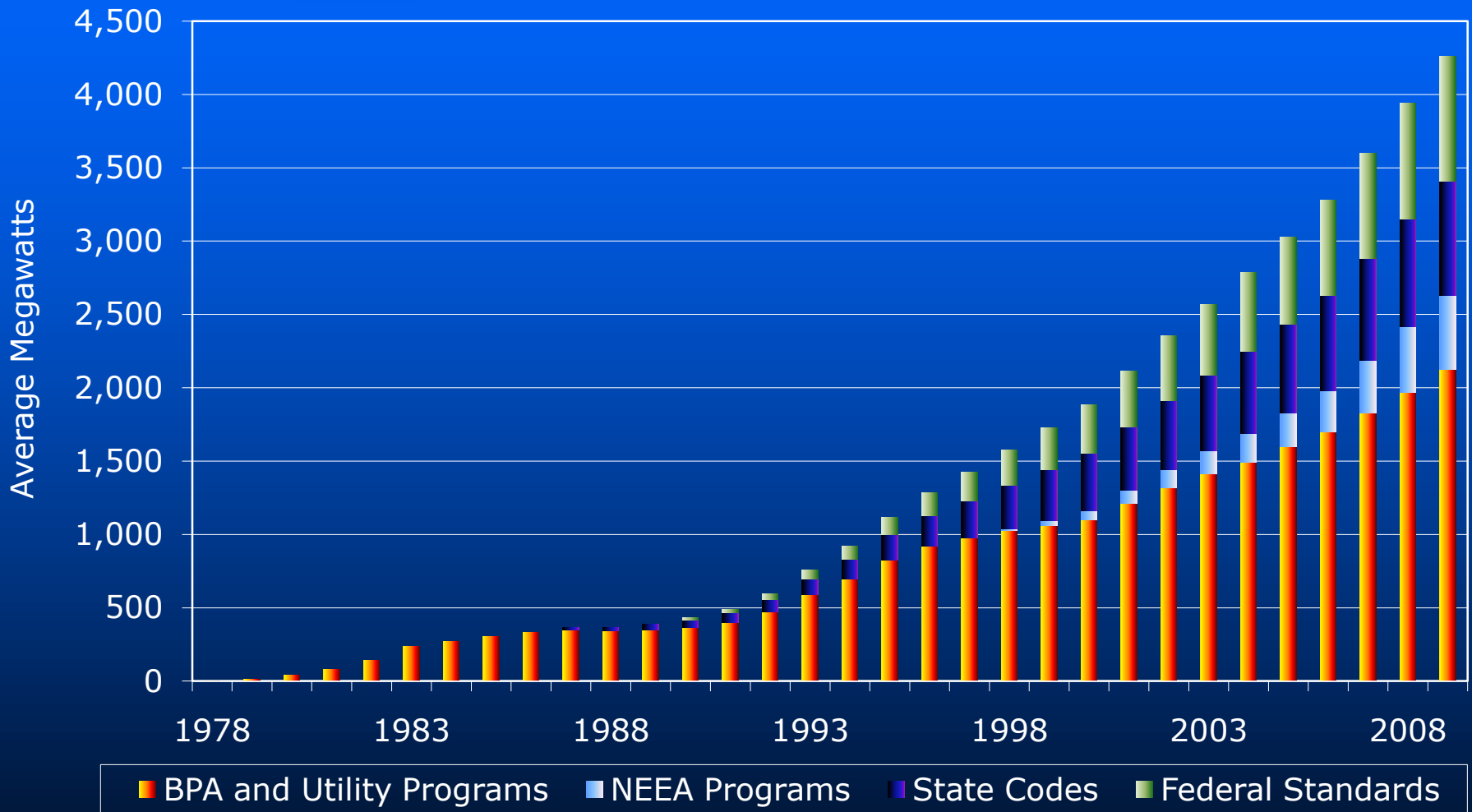


*Representative Build Out. Actual build out schedule depends on future conditions

Energy Efficiency Potential



1978-2009 Utility & BPA Programs, Energy Codes & Federal Efficiency Standards Have Produced Almost 4,300 Average Megawatts of Savings*



*One “Average Megawatt = 8,760 MWH

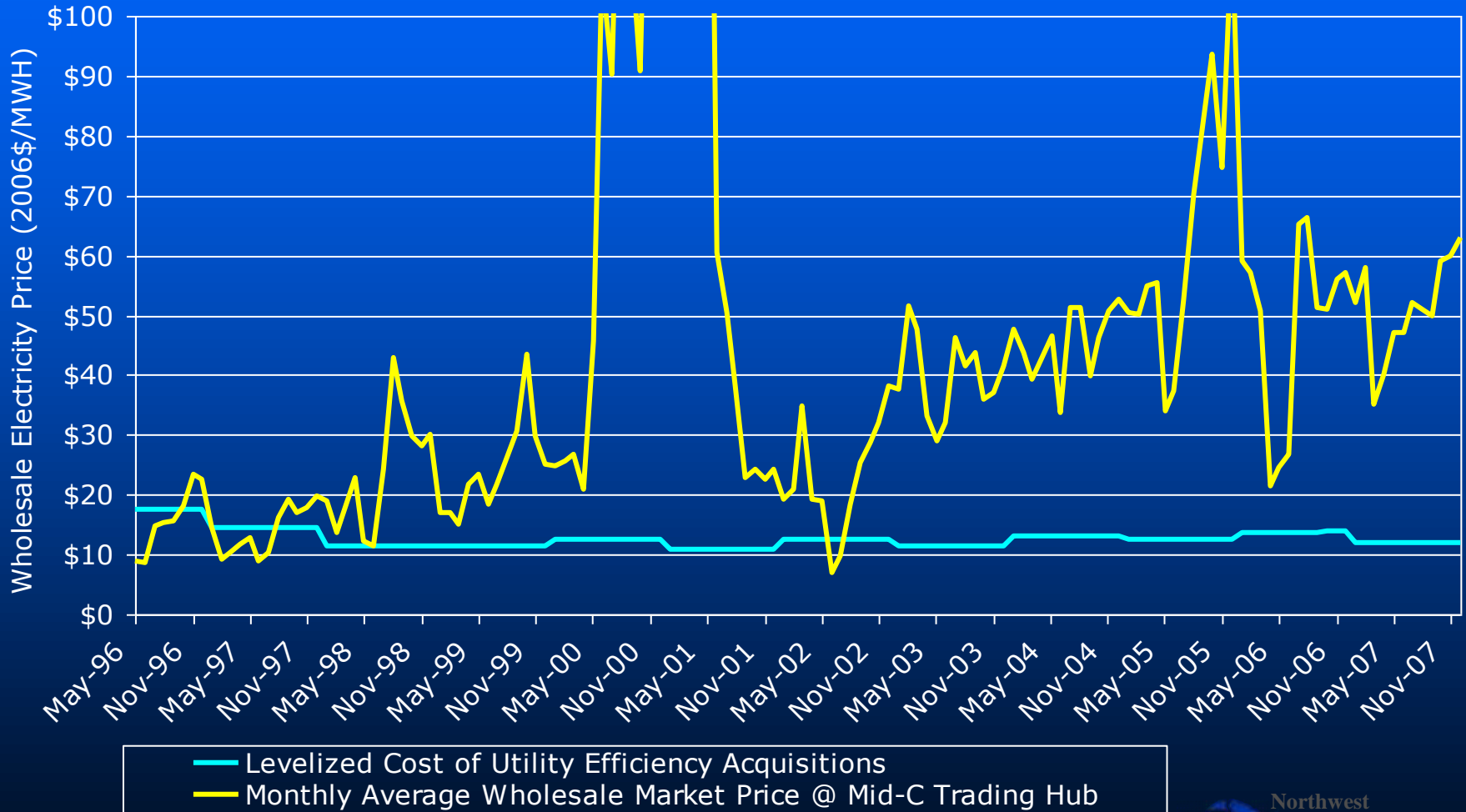


4,300 average megawatts

- It's enough electricity to serve **80 percent of Oregon**
= *PGE + PacifiCorp + EWEB + McMinnville + Central Lincoln and Clatskanie PUDs*
- It's equal to the electricity use of **all** of Montana and Idaho combined
- It saved the region's consumers nearly than **\$2.3 billion** in **2009**
- It lowered 2009 PNW CO₂ emissions by an estimated **19 million tons**

Why Energy Efficiency?

5. Because it is a bargain, compared to the cost of wholesale power





Trade Ally Roundtable Existing Homes

Year End Existing Homes Dashboard

| Trade Ally Projects | | | Non-Trade Ally Projects | | |
|---------------------|-----|-------------|-------------------------|------|-------------|
| <u>2009</u> | ↓2% | <u>2010</u> | <u>2009</u> | ↓38% | <u>2010</u> |

| Trade Ally Measures/project | | | Non-Trade Ally Measures/project | | |
|-----------------------------|--------|-------------|---------------------------------|--------|-------------|
| <u>2009</u> | ↑16% | <u>2010</u> | <u>2009</u> | ↓31% | <u>2010</u> |
| | to 2.5 | | | to 1.4 | |

| Trade Ally Quality Control "Pass" rate | | | Non-Trade Ally Quality Control "Pass" rate | | |
|--|--------|-------------|--|--------|-------------|
| <u>2009</u> | ↓2% | <u>2010</u> | <u>2009</u> | NC | <u>2010</u> |
| | to 76% | | | at 60% | |

| Home Energy Reviews | | |
|---------------------|------|-------------|
| <u>2009</u> | ↓31% | <u>2010</u> |

Q1 Existing Homes Dashboard

| Trade Ally Projects | | | Non-Trade Ally Projects | | |
|---------------------|--------------|-------------|-------------------------|--------------|-------------|
| <u>2010</u> | ↓42%* | <u>2011</u> | <u>2010</u> | ↓38%* | <u>2011</u> |

| Trade Ally Measures/project | | | Non-Trade Ally Measures/project | | |
|-----------------------------|---------------|-------------|---------------------------------|---------------|-------------|
| <u>2010</u> | ↑66% | <u>2011</u> | <u>2010</u> | ↓60% | <u>2011</u> |
| | to 2.1 | | | to 1.4 | |

| Trade Ally Quality Control "Pass" rate | | | Non-Trade Ally Quality Control "Pass" rate | | |
|--|---------------|-------------|--|---------------|-------------|
| <u>2010</u> | ↓4% | <u>2011</u> | <u>2010</u> | 0% | <u>2011</u> |
| | to 76% | | | at 60% | |

| Home Energy Reviews | | |
|---------------------|-------------|-------------|
| <u>2010</u> | ↑10% | <u>2011</u> |



2011 Trade Ally Tiering

- Next tiering update: April 1, 2011
 - Please check your company profile
 - Contact us with concerns
- Changes to logic for July 2011
 - Top tier
 - ≥ 15 projects, QC score and webinars
 - ≥ 5 projects + average 2 measures per project, QC score and webinars
- Note: top tier must attend two webinars:
 - Part 1 – Trade Ally Program Training
 - Part 2 – Weatherization Specifications



2011 Communications

- *Insider*
- Quarterly updates from Existing Homes
 - Email on March 28 from Ashley Sheehan, Trade Ally Coordinator
 - June
- Energy Trust promotions page



Updates

- Home Performance with ENERGY STAR®
 - 2011 EPA Sustained Excellence Award
 - \$150 test-in incentive is live!
- 2011 Specifications Manual
 - Changes posted to website
 - To be discussed in breakout
 - Webinar on Wednesday, April 6
 - For your staff meeting?
 - Feedback period is open
- May 1 – No more second measure for windows incentive



Training and education

Trade Ally Training and Events Calendar

- Energy Trust webpage – www.energytrust.org
- Click “For Allies”
- Click “Calendar”

- On-demand trainings coming soon!
 - For new employees and office staff
 - Underfloor insulation
 - Attic insulation (Q2)


- Trade Ally Customer Service Training
 - What is Energy Trust?
 - Closing the sale
 - Excel at customer service
 - May-June: Regional offerings
 - Register through Trade Ally Training Calendar
 - Your feedback is welcome!



Training and education

- **Trade Ally Roundtables**
 - March 30th: Portland
 - March 31st: Bend
 - April 1st: Grants Pass
- **Trade Ally webinars (required for top tier trade allies)**
 - April 27th: Trade Ally Program Training
 - April 28th: Weatherization Specifications Manual
- **House as a System**
 - April 5th: Portland
 - April 8th: Medford
- **BPI: Residential Building Envelope Air Leakage Control Installer**
 - April 13-15: Portland (Accessible Areas Air Leakage Control Installer)
 - April 27-29: Portland (Whole House Air Leakage Control Installer)
- **BPI: Building Analyst and Envelope Professional**
 - May 23-27: Medford (Building Analyst)
 - June 7-9: Medford (Envelope Professional)

Existing Homes marketing



FREE YOUR HOME.

Whether you're living in a farmhouse, a bungalow or an apartment, your path to reducing your energy costs is *clear this way* at energytrust.org/free. Get started with an Energy Saver Kit, a Home Energy Review or by recycling a fridge. Log onto energytrust.org/free.

This is new. This is now. This is free.
This is your first step toward a new energy freedom.

1.866.368.7879
energytrust.org

Serving customers of Portland General Electric, Pacific Power, NW Natural and Cascade Natural Gas.

February – May Online

- KATU.com (and App)
- KGW.com (and App)
- KPTV.com (and App)
- Oregonlive.com (and App)

March – April

- Albany Democrat Herald
- Baker City Herald
- Bend Bulletin
- Coos Bay World
- Corvallis Gazette
- Daily Astorian
- Enterprise/Wallowa County Chieftain
- Eugene Register Guard
- Grants Pass Daily Courier
- Klamath Falls Herald and News
- Lincoln City News Guard
- Medford Mail Tribune
- Ontario Argus Observer
- Pendleton East Oregonian
- Roseburg News Review
- Salem Statesman Journal
- The Source Weekly

Existing Homes marketing

A flyer titled "Spring To-Do's" with a background of colorful flowers. The text on the flyer includes: "Spring is in the air. WHAT'S ON YOUR TO-DO LIST?", a list of three items: "1. Improve your home's comfort", "2. Save energy", and "3. Put up to \$760 back in your wallet" (with "\$760" circled), and a section titled "HERE'S A SPRING PROJECT YOU CAN REALLY WARM UP TO" with a numbered list of three steps: "1. Upgrade to a 95% high-efficiency natural gas furnace. Plan for a cozy winter with lower heating costs.", "2. Test ductwork and seal leaks. Testing identifies leaks and sealing ensures warm air isn't wasted.", and "3. Work with a NW Natural Certified Contractor. You'll get expert service plus help applying for up to \$760 back." The flyer also features logos for EnergyTrust of Oregon and NW Natural.

Spring is in the air. WHAT'S ON YOUR TO-DO LIST?

Spring To-Do's

1. Improve your home's comfort
2. Save energy
3. Put up to **\$760** back in your wallet

If your furnace left you cold this winter,
HERE'S A SPRING PROJECT YOU CAN REALLY WARM UP TO

It's easy as 1-2-3.

- 1 Upgrade to a 95% high-efficiency natural gas furnace. Plan for a cozy winter with lower heating costs.
- 2 Test ductwork and seal leaks. Testing identifies leaks and sealing ensures warm air isn't wasted.
- 3 Work with a NW Natural Certified Contractor. You'll get expert service plus help applying for up to \$760 back.

For more information, visit enaturaloffers.com and select "Furnace & Duct Sealing Offer" or call 800-422-4012 ext.2515.

EnergyTrust of Oregon

NW Natural

Washington

- The Columbian
- Battleground Reflector



Existing Homes marketing

- Bend Bulletin
- Redmond Spokesman
- The Columbian



YOUR HOUSE IS TRYING TO TELL YOU SOMETHING

Let Energy Trust of Oregon translate with a **Home Energy Review**. We'll evaluate your home and show you where you can make energy-efficient improvements that increase comfort and reduce energy costs.

- 1** Schedule an Energy Trust energy advisor to visit your home. In the course of an hour, we'll show you where your home is experiencing energy loss.
- 2** We'll provide recommendations of energy-saving improvements. You are then able to decide which improvements fit within your budget.
- 3** Work with Energy Trust contractors to access available cash incentives. You can reduce your energy costs by as much as 30 percent.

+

To schedule your Home Energy Review—and to learn about current promotions that can save you even more—call **1.866.368.7878** or visit www.energytrust.org.

Serving customers of Portland General Electric, Pacific Power, NW Natural and Cascade Natural Gas.





Thank you

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Existing Homes Breakout Session

2011 Weatherization Specifications Manual

- Updates webinar – April 6
- IN 1.10 – Carbon monoxide detector
- IN 1.11 – CAZ testing
- IN 1.12 – Solar
- QC Policies and Procedures
- AT 1.1 – Attic air sealing (before insulating)
- SM – Small Multifamily Properties
 - Duplexes, triplexes, fourplexes
- MF – Multifamily Properties
 - 5 contiguous units or more
- Conditioned basements