

ENERGY EFFICIENCY 2008 REVISED ACTION PLAN/BUDGET



PROGRAM:	HOME ENERGY SOLUTIONS- EXISTING HOMES	SECTOR:	RESIDENTIAL
PURPOSE: Acquire cost-effective electric and gas savings by providing energy efficiency services and incentives for existing single-family, multifamily and manufactured homes. Contributes to Strategic Plan goals 1, 3, 4, 5.			
PROGRAM STRATEGY:			
In consideration of incremental funding stemming from the passage of the Renewable Energy Act and subsequent electric utility rate filing approvals, the following strategies are contemplated in this program for 2008 and 2009.			
Base:			
<ol style="list-style-type: none"> 1. Offer incentives for a wide variety of efficiency measures for single-family, multifamily, and manufactured homes. 2. Offer an online home energy analyzer to Energy Trust public purpose funding contributors. 3. Provide home energy reviews to customers in areas served by the Energy Trust of Oregon. 4. Work with utility funders to create promotions targeted to their customers. 5. Leverage manufacturer and community based partnerships in delivering energy efficiency. 6. Fully integrate the assessment and processing of Solar Hot Water applications. 7. Coordinate with ODOE to reward participants in the State Home Weatherization Program (SHOW) from Energy Trust service territories with compact fluorescent light bulbs. 8. Establish realtors as a new trade ally for the program. 9. Continue growth of Home Performance with ENERGY STAR[®], a comprehensive, whole-house approach to single family residential energy efficiency that utilizes diagnostic equipment and generates a home analysis assessment. 			
Incremental:			
<ol style="list-style-type: none"> 10. Offer lower interest financing/increased incentive structure as an option for median income customers thru Assisted Home Performance program. 11. Add more services and/or device installations to home energy reviews with goal to move customers to measure installation, resulting in greater savings. 			
2008 ACTIONS:			
Base:			
<ol style="list-style-type: none"> 1. Expand the number of trade allies participating in the Home Performance program in southern and eastern Oregon. 2. Effectively leverage utility and manufacturer promotional activities. 3. Engage in promotional activities with gas utilities to promote efficient gas furnaces and other efficient gas applications. 4. Conduct solar potential studies on residential homes and process solar hot water applications, with a goal to increase the number of solar thermal installations. 5. Sponsor events with Oregon Remodeling Association, Affordable Comfort, Building Performance Institute, the Remodelers Council and other organizations that support activities of trade allies. 6. Provide full program services to Cascade service territory including Home Performance with ENERGY STAR. 7. Provide approximately 12,000 CFLs to State Home Oil Weatherization (SHOW) customers. 8. Pursue more opportunities for gas efficiency measures. 9. Conduct a Blue Line behavioral monitor pilot. 10. Evolve multifamily program services to focus on high value measures such as common area lighting, appliances and HVAC. 11. Develop and conduct a pilot with the City of Portland that focuses on messaging energy efficiency and greenhouse gas mitigation through EPC and carbon labels that communicate how a homeowner can improve energy efficiency and reduce the home's carbon foot print. 12. Work with OR Housing & Community Services to pilot solar hot water systems installations to low income homes 13. Develop near-low income (60-80% median) outreach strategy and implement in last quarter of 2008. 			
Incremental:			
<ol style="list-style-type: none"> 14. Expand refrigerator replacement pilot efforts to other areas with incremental funds including Roseburg and Corvallis. 15. Assess effectiveness of heat pump commissioning for a programmatic offering. 16. Investigate large scale early refrigerator retirement effort for entire region not limited by income. 17. Fund educational "living wise" materials for student initiated residential direct installs in elementary / Jr. High curricula. 			
2009 PLANNED ACTIVITIES:			
<ol style="list-style-type: none"> 1. Continued focus on multifamily lighting and appliances related projects. 2. Continue delivery activities commensurate with incremental funding levels employing flexible initiatives established to spend funding as needed. 3. Continue collaboration efforts with Avista to expand Home Performance with ENERGY STAR in southern Oregon. 			

ENERGY EFFICIENCY 2008 REVISED ACTION PLAN/BUDGET



TARGETS:

Year	Annual Electric & Gas Expense \$M	Electric			
		aMW	MWh	\$M/aMW	Levelized Cost (\$/kWh)
2007 Full-Year Forecast	\$ 11.3	2.20	19,246	\$2.64	\$0.023
2008 Proposed Budget	\$ 16.9	2.31 - 3.08	20,227 - 26,970	\$ 4.37 - \$ 3.28	\$ 0.036 - \$ 0.027
2009 Projection	\$ 15.7	1.97 - 2.63	17,249 - 22,998	\$ 4.38 - \$ 3.28	\$ 0.035 - \$ 0.026

	Gas		
	Therms	\$/Therm	Levelized Cost (\$/therm)
2007 Full-Year Forecast	771,587	\$7.12	\$0.48
2008 Proposed Budget	711,220 - 948,293	\$ 9.59 - \$ 7.19	\$ 0.65 - \$ 0.48
2009 Projection	677,934 - 903,913	\$ 10.47 - \$ 7.85	\$ 0.69 - \$ 0.52

**The Energy Trust of Oregon, Inc
Statement of Functional Expense
2008 Budget
Existing Homes**

	2007 Actual	2008 Budget	2009 Projection
PMC Costs			
Program Management	\$417,530	\$533,603	\$574,267
Delivery	2,199,633	3,778,547	3,637,557
Marketing-PMC	391,055	855,969	964,955
Performance Comp	172,246	100,000	75,000
Incentives	5,983,927	8,307,639	7,425,576
Total PMC Costs	9,164,390	13,575,759	12,677,356
Staffing	239,012	298,935	316,871
Marketing	386,510	303,240	257,615
Other Services			
Evaluation and Planning Services	299,047	666,217	603,901
QA-Subcontracted	57,208	80,000	85,000
Customer Service & Trade Ally Support	249,738	579,903	567,682
Legal Services	8,512		
Other Professional Services	12,059	260,168	76,575
Total Other Services	626,564	1,586,288	1,333,158
General			
General Program Support Costs	111,895	77,775	77,325
Shared	32,267	34,208	27,028
IT Services	251,107	487,651	477,823
Total General	395,268	599,634	582,176
PROGRAM DIRECT COSTS	10,811,744	16,363,857	15,167,176
Allocated mgmt & general marketing	488,945	541,267	544,001
TOTAL EXPENSE, FULLY ALLOCATED	11,300,689	16,905,124	15,711,177

PROGRAM:	HOME ENERGY SOLUTIONS- NEW HOMES/PRODUCTS	SECTOR:	RESIDENTIAL
<p>PURPOSE: Program targets lost energy efficiency opportunities in the residential sector. Provide the residential new home market with services and incentives with focus on EPA ENERGY STAR® regional specifications, reaching home buyers, builders, multifamily developers, and manufacturers of pre-fabricated homes. Overcome market barriers to the purchase of energy efficient products through product incentives, consumer awareness and education, focusing on ENERGY STAR label and corresponding benefits of products and services that display it. Contributes to Strategic Plan goals 1, 3, 4, 5.</p>			
<p>PROGRAM STRATEGY:</p> <p>In consideration of incremental funding stemming from the passage of the Renewable Energy Act and subsequent electric utility rate filing approvals, the following strategies are contemplated in this program for 2008 and 2009.</p> <p>Base:</p> <ol style="list-style-type: none"> 1. Deliver program to customers and builders by utilizing Program Management Contractor (PMC) and a statewide comprehensive network of trade allies, leveraging existing market relationships and professional service channels. 2. Provide market support (e.g., building diagnostics and equipment installation support, market-based verifier oversight, training, co-op marketing funds, retailer training, lighting support, and outreach to industry organizations). 3. Develop and implement elements to overcome barriers (e.g., education, lighting, HVAC, solar). 4. Provide incentives (e.g., homes, stand-alone measures, clothes washers, light bulbs, duct sealing, commissioning (Cx)). 5. Conduct marketing to create consumer demand (e.g., ads, website, education, trade shows, and school outreach). 6. Move the market preparedness for the next generation of high performance homes. 7. Leverage Northwest Energy Efficiency Alliance (NEEA) residential sector activities. 8. Leverage other related programs and organizations (e.g., Earth Advantage, NEEM, home builder associations). <p>Incremental:</p> <ol style="list-style-type: none"> 9. Provide incentives to further promote energy efficient lighting. 10. Collaborate with regional and national market actors to introduce and incent new energy efficient products. 			
<p>2008 ACTIONS:</p> <p>Base:</p> <ol style="list-style-type: none"> 1. Increase market share and long-term viability of ENERGY STAR homes in the new construction market place, ENERGY STAR refrigerators and 2.0 MEF clothes washers in the appliance marketplace, and energy efficient lighting (specialty CFLs, LED can lights, and appropriate application of CFLs in new construction lighting packages). 2. Provide incentives for ENERGY STAR single and multi-family homes, gas furnaces, zonal electric homes, heat pumps, commissioning and/or duct sealing for heat pumps, manufactured homes, tankless hot water heaters, refrigerators, and clothes washer incentives on ultra-high efficiency models (2.0+ MEF). 3. Recruit new builders and help them prepare for the code change to take place in 2008. 4. Provide technical guidance, training, incentives, and promotions to support high performance homes (e.g., HPH “challenge”, design training and assistance, solar integration, community specs). 5. Provide performance testing and duct sealing training to HVAC installers. 6. Promote energy efficient lighting through the spring and fall BPA specialty bulb buy down, the school fundraiser, and the on-line home energy analyzer. 7. Continue technical school outreach initiative. 8. Provide training to PV and solar water system installers through a partnership with Solar Oregon and OSEIA. <p>Incremental:</p> <ol style="list-style-type: none"> 9. Implement specialty CFL buy downs, LED can lights for kitchens with dimmers, and fixture and CFL packages for new homes. 			
<p>2009 PLANNED ACTIVITIES:</p> <ol style="list-style-type: none"> 1. Maintain new home market transformation efforts while increasing focus on alternative strategies toward achieving low-energy homes and green communities. 2. Increase installations of solar thermal systems and provide support for direct application renewable strategies. 3. Begin promoting LED lighting options and next generation CFL technologies. 4. Promote new viable technologies (e.g., heat pump water heaters, non-condensing gas water heaters). 			
<p>TARGETS:</p>			

ENERGY EFFICIENCY 2008 REVISED ACTION PLAN/BUDGET



Year	Annual Electric & Gas Expense \$M	Electric			
		aMW	MWh	\$M/aMW	Levelized Cost (\$/kWh)
2007 Full-Year Forecast	\$ 9.5	4.59	40,171	\$1.68	\$0.028
2008 Proposed Budget	\$ 14.1	3.86 - 5.14	33,772 - 45,030	\$ 3.04 - \$ 2.28	\$ 0.049 - \$ 0.037
2009 Projection	\$ 17.4	4.55 - 6.06	39,830 - 53,107	\$ 3.30 - \$ 2.48	\$ 0.053 - \$ 0.040

	Gas		
	Therms	\$/Therm	Levelized Cost (\$/therm)
2007 Full-Year Forecast	336,588	\$5.37	\$0.40
2008 Proposed Budget	288,874 - 385,165	\$ 8.43 - \$ 6.32	\$ 0.61 - \$ 0.45
2009 Projection	338,791 - 451,721	\$ 7.11 - \$ 5.33	\$ 0.51 - \$ 0.38

**The Energy Trust of Oregon, Inc
Statement of Functional Expense
2008 Budget
New Homes & Products**

	2007 Actual	2008 Budget	2009 Projection
PMC Costs			
Program Management	\$400,316	\$562,630	\$583,530
Delivery	2,657,480	4,633,291	6,134,174
Marketing-PMC	908,608	865,167	949,254
Performance Comp	214,609	100,000	75,000
Incentives	4,105,888	6,006,763	7,555,409
Total PMC Costs	8,286,900	12,167,851	15,297,368
Staffing	145,480	259,770	275,357
Marketing	63,962	151,620	155,308
Other Services			
Evaluation and Planning Services	227,454	460,588	473,188
QA-Subcontracted	37,230	8,000	20,000
Customer Service & Trade Ally Support	34,176	99,407	146,364
Legal Services	2,912		
Other Professional Services	16,222	76,995	15,495
Total Other Services	317,993	644,991	655,046
General			
General Program Support Costs	9,954	49,750	34,500
Shared	20,371	29,542	23,342
IT Services	252,378	385,766	377,991
Total General	282,704	465,058	435,833
PROGRAM DIRECT COSTS	9,097,040	13,689,289	16,818,911
Allocated mgmt & general marketing	415,888	452,800	603,246
TOTAL EXPENSE, FULLY ALLOCATED	9,512,928	14,142,089	17,422,157

ENERGY EFFICIENCY 2008 REVISED ACTION PLAN/BUDGET



MARKET TRANSFORMATION NORTHWEST ENERGY
PROGRAM: EFFICIENCY ALLIANCE (NEEA) **SECTOR: RESIDENTIAL**

PURPOSE: NEEA funds regional market transformation initiatives in the Northwest region across commercial, industrial and residential sectors working in coordination with Energy Trust programs. This budget contemplates leveraging NEEA regional market transformation initiatives in the residential market sector to acquire cost-effective savings while creating sustainable and efficient purchasing patterns among consumers. Contribute to Strategic Plan goals 1, 4, 5.

PROGRAM STRATEGY:

1. Leverage Energy Trust and NEEA programs to increase delivery support and program incentive offerings.
2. Coordinate marketing efforts in areas where there are complimentary NEEA and Energy Trust initiatives, in particular, ENERGY STAR New Homes.
3. Work with residential program staff to develop new residential initiatives that provide cost effective market transformation results.
4. Continue the expansion of the market share of ENERGY STAR Northwest Homes, while exploring possibilities for more advanced efficient homes.

2008 ACTIONS:

1. Run regional promotions of ENERGY STAR New Homes in coordination with utility and public purpose provider (including Energy Trust) rebates.
2. Complete demonstrations for advanced technologies in new homes and expand the number of high performance homes being built in Oregon in conjunction with Oregon Department of Energy (ODOE), Portland Office of Sustainability (OSD) and U.S. Department of Energy (DOE).
3. Initiate an impact evaluation that will provide an analysis of actual realized savings per ENERGY STAR new home, based on homes constructed in 2006-2007. It is assumed that residential new construction building characteristics study will serve as a baseline for this impact evaluation. (Energy Trust will leverage their evaluation on this effort.)
4. Work with residential program staff to identify new opportunities in residential market transformation efforts.
5. Coordinate Energy Trust program operations with NEEA regional initiatives to maximize overall program effectiveness.

2009 PLANNED ACTIVITIES:

- Continue efforts to drive regional progress toward adoption of homes certified to the Northwest ENERGY STAR standards. 2009 activities will likely involve raising the Energy Star spec to 15% above the proposed 2008 Oregon code and continuing high performance homes efforts.
- Continued invest in the new residential market transformation opportunities identified in late 2007/early 2008.

TARGETS:

Year	Annual Electric Expense \$M	Electric			
		aMW	MWh	\$M/aMW	Levelized Cost (\$/kWh)
2007 Full-Year Forecast	\$ 1.2	6.03	52,785	\$0.20	\$0.004
2008 Proposed Budget	\$ 1.0	4.11 - 5.47	35,965 - 47,953	\$ 0.25 - \$ 0.19	\$ 0.004 - \$ 0.003
2009 Projection	\$ 0.9	3.61 - 4.81	31,590 - 42,120	\$ 0.25 - \$ 0.19	\$ 0.005 - \$ 0.003

(see budget details on reverse)

ENERGY EFFICIENCY 2008 REVISED ACTION PLAN/BUDGET



**The Energy Trust of Oregon, Inc
Statement of Functional Expense
2008 Budget
Market Transformation (NEEA) - Residential**

	2007 Actual	2008 Budget	2009 Projection
PMC Costs			
Delivery	\$1,130,030	\$948,711	\$833,320
Total PMC Costs	1,130,030	948,711	833,320
Staffing	3,278	11,677	12,378
Other Services			
Evaluation and Planning Services	9,680	32,376	31,872
Total Other Services	9,680	32,376	31,872
General			
General Program Support Costs		933	933
Shared	300	933	737
IT Services		2,052	2,011
Total General	300	3,918	3,681
PROGRAM DIRECT COSTS	1,143,287	996,683	881,251
Allocated mgmt & general marketing	52,029	32,967	31,606
TOTAL EXPENSE, FULLY ALLOCATED	1,195,316	1,029,650	912,857

PROGRAM: BUSINESS ENERGY SOLUTIONS- EXISTING BUILDINGS **SECTOR:** COMMERCIAL

PURPOSE: Acquire cost-effective electric and natural gas savings by providing technical assistance and financial incentives for high-efficiency equipment and energy efficient operating practices in existing commercial facilities. Contributes to Strategic Plan goals 1, 3, 4, 5.

PROGRAM STRATEGY:

In consideration of incremental funding stemming from the passage of the Renewable Energy Act and subsequent electric utility rate filing approvals, the following strategies are contemplated in this program for 2008 and 2009.

Base:

1. Target decision makers of existing commercial renovation projects including owners and installation contractors.
2. Deliver program to commercial entities by utilizing Program Management Contractor (PMC) and a statewide comprehensive network of trade allies, leveraging existing market relationships and professional service channels.
3. Maintain and expand successful state-wide Trade Ally Network of installation and technical assistance contractors to further deliver program services to the public.
4. Maintain focus on current target markets- foodservice, lodging, office, healthcare and natural gas equipment.
5. Incorporate operation and maintenance services and incentives formerly offered by Building Tune-Up and Operations pilot program.
6. Coordinate with ODOE and renewable energy programs to package program offerings.
7. Leverage Northwest Energy Efficiency Alliance commercial sector activities.
8. PMC will add marketing and technical resources to increase program participation and project throughput.
9. Expand program offerings geographically by engaging subcontractors in central and southern Oregon.

Incremental:

10. Expand target markets and target technologies.
11. Create enhanced outreach and educational program utilizing direct calls and emails, referrals, mass emails, cold calls, news releases, direct mailings, case studies, advertisements in trade publications, program seminars, sponsorships of events and organizations, web site, articles, bill inserts and partnerships with related organizations.

2008 ACTIONS:

Base:

1. Add new equipment incentives and develop new outreach strategies for current target markets- foodservice, lodging, office, healthcare and natural gas equipment.
2. Smoothly transition trade ally and allied technical analysis contractors to a more direct relationship with Energy Trust.
3. Continue to align with ODOE programs to minimize differences in program requirements (e.g. BETC, SEED, High-Performance Schools).
4. Integrate ODOE Business Energy Tax Credits (BETC) forms in incentive offerings to facilitate and streamline application process.
5. Continue to improve and streamline program rules, forms and participation steps for Trade Allies and participants.
6. Develop targeted incentives and marketing materials for new markets like commercial laundries, groceries and convenience stores, data centers and services and retro-commissioning.
7. Hire PMC marketing manager to coordinate all marketing and outreach activities.

Incremental:

1. Pilot tablet-PCs for low-level energy audits
2. Hire additional PMC technical resources to facilitate and review projects to optimize throughput.
3. Offer expanded technical and educational resources to trade allies and participants.

2009 PLANNED ACTIVITIES:

1. Lower acquisition cost of energy savings by streamlining program operations.
2. Expand into new target markets and target technologies.

TARGETS:

ENERGY EFFICIENCY 2008 REVISED ACTION PLAN/BUDGET



Year	Annual Electric & Gas Expense \$M	Electric			
		aMW	MWh	\$M/aMW	Levelized Cost (\$/kWh)
2007 Full-Year Forecast	\$ 5.3	3.26	28,530	\$1.16	\$0.017
2008 Proposed Budget	\$ 11.9	3.96 - 5.28	34,670 - 46,226	\$ 2.59 - \$ 1.94	\$ 0.032 - \$ 0.024
2009 Projection	\$ 15.9	4.71 - 6.28	41,250 - 55,000	\$ 2.88 - \$ 2.16	\$ 0.035 - \$ 0.026

	Gas		
	Therms	\$/Therm	Levelized Cost (\$/therm)
2007 Full-Year Forecast	598,831	\$2.56	\$0.28
2008 Proposed Budget	428,068 - 570,757	\$ 3.84 - \$ 2.88	\$ 0.37 - \$ 0.28
2009 Projection	562,500 - 750,000	\$ 4.06 - \$ 3.04	\$ 0.39 - \$ 0.30

**The Energy Trust of Oregon, Inc
Statement of Functional Expense
2008 Budget
Existing Buildings**

	2007 Actual	2008 Budget	2009 Projection
PMC Costs			
Program Management	\$111,106	\$235,316	\$383,837
Delivery	742,580	1,696,001	2,428,956
Marketing-PMC	446,492	859,063	1,039,407
Performance Comp	(14,098)	100,000	100,000
Incentives	3,202,498	7,016,280	9,949,599
Total PMC Costs	4,488,578	9,906,660	13,901,799
Staffing	175,993	273,391	289,795
Marketing	61,362	199,120	110,750
Other Services			
Evaluation and Planning Services	206,270	533,904	500,097
QA-Subcontracted		30,000	30,000
Customer Service & Trade Ally Support	25,884	69,698	64,818
Legal Services	1,088		
Other Professional Services		187,588	130,693
Total Other Services	233,242	821,189	725,608
General			
General Program Support Costs	24,484	64,600	59,600
Shared	20,862	30,373	23,998
IT Services	95,448	204,456	200,335
Total General	140,794	299,428	283,933
PROGRAM DIRECT COSTS	5,099,969	11,499,789	15,311,885
Allocated mgmt & general marketing	231,329	380,379	549,191
TOTAL EXPENSE, FULLY ALLOCATED	5,331,298	11,880,168	15,861,076

PROGRAM: BUSINESS ENERGY SOLUTIONS- NEW BUILDINGS**SECTOR:****COMMERCIAL**

PURPOSE: Acquire cost-effective electric and natural gas savings by providing technical assistance and financial incentives for high-efficiency design and equipment in commercial and industrial new construction and major renovation projects. Contributes to Strategic Plan Goals 1, 3, 4, 5

PROGRAM STRATEGY:

In consideration of incremental funding stemming from the passage of the Renewable Energy Act and subsequent electric utility rate filing approvals, the following strategies are contemplated in this program for 2008 and 2009.

Base:

1. Bolster pipeline for projects to be completed in 2009 and 2010.
2. Target decision makers in commercial and industrial new construction projects and major renovations of existing buildings.
3. Ensure program captures the majority of large projects.
4. Target architects and engineers by providing tools and resources to assist them in selling their clients on high efficiency design and equipment.
5. Enroll more projects that follow a "design-build" model.
6. Deliver program directly to owners and developers by utilizing Program Management Contractor (PMC) and a statewide comprehensive network of trade allies, leveraging existing market relationships and professional service channels.
7. Incorporate solar water heating and photovoltaic measures leveraging outreach and management resources. Rely on delivery support from Energy Trust solar program staff.
8. Coordinate with ODOE to package program offerings with Business Energy Tax Credits (BETC).
9. Leverage Northwest Energy Efficiency Alliance commercial sector activities to develop projects in targeted markets.
10. Encourage projects that will enroll in program to install more efficiency measures.

Incremental:

11. Achieve deeper penetration in the market for small and medium-sized construction and major renovation projects.
12. Create enhanced outreach program utilizing direct calls and emails, referrals, mass emails, cold calls, news releases, direct mailings, case studies, advertisements in trade publications, program seminars, sponsorships of events and organizations, web site, articles, bill inserts and partnerships with related organizations.

2008 ACTIONS:

Base:

1. Release a targeted small and medium sized project development initiative with focused marketing approach.
2. Work with design community to showcase/incorporate better analytical tools for building design (e.g. continue to host energy modeling meetings, update energy modeling tools with Oregon energy code data, develop and incorporate analytical lighting tools for new building design).
3. Continue to develop materials for architects and engineers to promote the program to their clients.
4. Continue to align with ODOE programs to minimize differences in program requirements (e.g. BETC, SEED, High-Performance Schools).
5. Provide outreach to encourage contractors that use a design-build approach to leverage program opportunities.
6. Continue to integrate Green Investment Fund projects with program activities.
7. Unspent incentive dollars budgeted for 2007 are moved into 2008 in anticipation of the program expanding into markets for small and medium sized new construction projects and starting to close more of these projects in 2008
8. Leverage NEEA Better Bricks program for program training and market actor education.
9. Increase PMC staff for marketing, outreach and technical support.
10. Offer tiered incentives for custom track and consider methods to encourage cooperation between lighting and mechanical contractors.

Incremental:

11. Further increase PMC staff for marketing, outreach and technical support.
12. Add more equipment to the Standard Track incentive list as new measures become available.
13. Expand ENERGY STAR® program track.

2009 PLANNED ACTIVITIES:

1. Continue to be aggressive at recruiting small and medium size projects.
2. Continue to successfully recruit large projects into the program.
3. Educate and enable service providers to deliver energy efficient practices in commercial new construction market.

TARGETS:

ENERGY EFFICIENCY 2008 REVISED ACTION PLAN/BUDGET



Year	Annual Electric & Gas Expense \$M	Electric			
		aMW	MWh	\$M/aMW	Levelized Cost (\$/kWh)
2007 Full-Year Forecast	\$ 4.9	2.59	22,656	\$1.57	\$0.015
2008 Proposed Budget	\$ 9.7	2.36 - 3.14	20,641 - 27,521	\$ 3.52 - \$ 2.64	\$ 0.035 - \$ 0.026
2009 Projection	\$ 11.7	3.32 - 4.43	29,102 - 38,803	\$ 3.08 - \$ 2.31	\$ 0.031 - \$ 0.023

	Gas		
	Therms	\$/Therm	Levelized Cost (\$/therm)
2007 Full-Year Forecast	538,120	\$1.63	\$0.14
2008 Proposed Budget	277,200 - 369,600	\$ 4.97 - \$ 3.73	\$ 0.44 - \$ 0.33
2009 Projection	351,830 - 469,107	\$ 4.16 - \$ 3.12	\$ 0.37 - \$ 0.28

**The Energy Trust of Oregon, Inc
Statement of Functional Expense
2008 Budget
New Buildings**

	2007 Actual	2008 Budget	2009 Projection
PMC Costs			
Program Management	\$32,963	\$73,365	\$77,033
Delivery	933,134	2,953,135	3,095,589
Marketing-PMC	66,828	89,140	
Performance Comp	109,140	100,000	100,000
Incentives	2,707,226	4,563,750	6,462,552
Total PMC Costs	3,849,291	7,779,390	9,735,175
Staffing	132,570	208,284	220,781
Marketing	80,246	237,870	246,264
Other Services			
Evaluation and Planning Services	293,705	518,533	479,810
QA-Subcontracted		15,000	15,750
Customer Service & Trade Ally Support	5,366	9,957	9,409
Legal Services	320		
Other Professional Services	221,560	352,588	331,217
Total Other Services	520,951	896,078	836,186
General			
General Program Support Costs	13,013	51,100	53,655
Shared	16,764	23,738	18,756
IT Services	104,529	166,898	163,534
Total General	134,307	241,736	235,945
PROGRAM DIRECT COSTS	4,717,365	9,363,359	11,274,351
Allocated mgmt & general marketing	214,730	309,712	404,378
TOTAL EXPENSE, FULLY ALLOCATED	4,932,095	9,673,071	11,678,729

ENERGY EFFICIENCY 2008 REVISED ACTION PLAN/BUDGET



**The Energy Trust of Oregon, Inc
Statement of Functional Expense
2008 Budget
Market Transformation (NEEA) - Commercial**

	2007 Actual	2008 Budget	2009 Projection
PMC Costs			
Delivery	\$1,519,264	\$1,505,797	\$1,318,863
Total PMC Costs	1,519,264	1,505,797	1,318,863
Staffing	14,007	4,409	4,673
Other Services			
Evaluation and Planning Services	6,915	19,814	19,506
Total Other Services	6,915	19,814	19,506
General			
General Program Support Costs		933	933
Shared	1,366	311	246
IT Services		684	670
Total General	1,366	1,928	1,849
PROGRAM DIRECT COSTS	1,541,551	1,531,948	1,344,891
Allocated mgmt & general marketing	70,151	50,672	48,237
TOTAL EXPENSE, FULLY ALLOCATED	1,611,702	1,582,620	1,393,128

PROGRAM: BUSINESS ENERGY SOLUTIONS- PRODUCTION EFFICIENCY**SECTOR: INDUSTRIAL**

PURPOSE: Acquire cost-effective electric savings through technical assistance and financial incentives for high-efficiency design and equipment in existing and new industrial processes and facilities. Although mostly funded through electric public purpose funding, small industrial gas customers on specific tariffs are eligible for gas program services and incentives. Contributes to Strategic Plan goals 1, 3, 4, 5.

PROGRAM STRATEGY:

In consideration of incremental funding stemming from the passage of the Renewable Energy Act and subsequent electric utility rate filing approvals, the following strategies are contemplated in this program for 2008 and 2009.

Base:

1. Strengthen direct communications with Program Delivery Contractors (PDCs) and service to program participants through in-house staffing of the Production Efficiency program.
2. Deliver program to owners, plant engineers and design process engineers through Program Delivery Contractors (PDCs) assigned to key sectors and geographic territories.
3. Promote program participation through developing a broad offering of services that include detailed technical analysis studies, project management assistance, prescriptive premium lighting and high efficiency motor incentives, and custom project incentives.
4. Develop with board approval, large-scale projects those being mega-projects, that exceed program incentive caps, or combined heat and power projects (CHP) to achieve program value through large-scale savings.
5. Target key decision makers of existing industrial process projects, including owners and Chief Financial Officers
6. Promote regional collaboration by working with neighboring utilities and complementary organizations to leverage our collective resources for energy efficiency in industry
7. Leverage Northwest Energy Efficiency Alliance industrial sector activities to develop projects in targeted industries.

Incremental:

8. Target measure offerings to small/medium industrial market through use of trade ally network and semi-prescriptive technology specific, incentive calculation tools.

2008 ACTIONS:**Base:**

1. Promote service delivery and market penetration for small to medium sized industrial customers, focusing on irrigation, dairy, nursery, and manufacturing markets.
2. Expand project commitment pipeline through concentrated PDC outreach efforts
3. Explore new strategies targeting O&M opportunities, specifically in compressed air and refrigeration systems.
4. Develop strategies to integrate continuous energy improvement into program offerings
5. Monitor project commitment level expenditures relative to utility funding territory and adjust PDC marketing to balance revenue project funding.
6. Influence growth in technical analysis skills by expanding the ATAC pool of engineering consultants adept at energy savings analysis calculations in the production environment.
7. Work with NEEA industrial staff to provide a coordinated marketing approach to food processors and pulp and paper companies.

Incremental

8. Expand marketing and trade ally support for small to medium sized industrial initiative.
9. Expand training opportunities for participants through collaboration with regional organizations
10. Develop additional semi-prescriptive incentive calculation tools for compressed air, boilers, refrigeration, and hydraulic systems to support the small industrial initiative.

2009 PLANNED ACTIVITIES:

1. Expand services that will be coordinating efforts with the potential Community Energy and T&D deferral projects.
2. Focus on delivering lower cost savings opportunities to achieve program delivery goals.
3. Implement strategies to reduce program management and delivery costs by optimizing PDC deployment.

TARGETS:

ENERGY EFFICIENCY 2008 REVISED ACTION PLAN/BUDGET



Year	Annual Electric & Gas Expense \$M	Electric			
		aMW	MWh	\$M/aMW	Levelized Cost (\$/kWh)
2007 Full-Year Forecast	\$ 11.3	14.97	131,178	\$0.75	\$0.011
2008 Proposed Budget	\$ 16.1	7.29 - 9.72	63,880 - 85,174	\$ 2.17 - \$ 1.63	\$ 0.028 - \$ 0.021
2009 Projection	\$ 18.2	8.44 - 11.26	73,977 - 98,636	\$ 2.11 - \$ 1.59	\$ 0.028 - \$ 0.021

	Gas		
	Therms	\$/Therm	Levelized Cost (\$/therm)
2007 Full-Year Forecast	3,102	-	-
2008 Proposed Budget	29,177 - 38,903	\$ 9.19 - \$ 6.89	\$ 1.05 - \$ 0.79
2009 Projection	58,354 - 77,806	\$ 6.72 - \$ 5.04	\$ 0.77 - \$ 0.57

**The Energy Trust of Oregon, Inc
Statement of Functional Expense
2008 Budget
Production Efficiency**

	2007 Actual	2008 Budget	2009 Projection
PMC Costs			
Program Management	\$59,499		
Delivery	2,524,341	2,885,811	3,084,244
Performance Comp	132,615	58,570	68,567
Incentives	7,351,440	11,420,536	13,309,851
Total PMC Costs	10,067,895	14,364,917	16,462,662
Staffing	221,556	373,543	395,955
Marketing	31,768	95,600	67,568
Other Services			
Evaluation and Planning Services	369,765	517,028	469,224
QA-Subcontracted	6,031	30,000	30,900
Customer Service & Trade Ally Support	739	1,285	1,045
Legal Services	1,440		
Other Professional Services	325	24,692	25,433
Total Other Services	378,299	573,004	526,603
General			
General Program Support Costs	22,927	42,240	43,507
Shared	24,172	38,249	30,222
IT Services	101,240	84,487	82,784
Total General	148,338	164,976	156,513
PROGRAM DIRECT COSTS	10,847,857	15,572,040	17,609,301
Allocated mgmt & general marketing	493,427	515,076	631,593
TOTAL EXPENSE, FULLY ALLOCATED	11,341,284	16,087,116	18,240,894

ENERGY EFFICIENCY 2008 REVISED ACTION PLAN/BUDGET



MARKET TRANSFORMATION NORTHWEST ENERGY
PROGRAM: EFFICIENCY ALLIANCE (NEEA) SECTOR: INDUSTRIAL

PURPOSE: NEEA funds regional market transformation initiatives in the Northwest region across commercial, industrial and residential sectors working in coordination with Energy Trust programs. This budget contemplates leveraging the NEEA regional market transformation initiatives in the industrial market sector through the Industrial Efficiency Alliance program (IEA) to acquire cost-effective savings while creating sustainable and efficient purchasing patterns among industrial consumers. Contribute to Strategic Plan goals 1, 4, 5

PROGRAM STRATEGY:

1. Focus efforts in the pulp and paper and food processing “vertical” markets.
2. Offer Continuous Energy Improvement (CEI) as the business practice change initiative that leads to energy efficient actions.
3. Facilitate the companies engaged in the CEI process through support in energy related organizational structure development, technical support, employee development and energy indicators.
4. Market program efforts through peer organizations and their readily available publications, trade shows, executive-level meetings and committees.
5. Leverage Energy Trust and utility resources to increase delivery outreach, support and program incentive offerings.

2008 ACTIONS:

1. Capitalize on NEEA’s partnership with the Northwest Food Processors Association to gain access to targeted, strategic food processing firms and to provide executive level support for setting an industry-wide energy efficiency goal.
2. Move companies engaged with the Industrial Efficiency Alliance through the CEI process in a manner that allows them to reach their energy efficiency goals.
3. Enhance the process for facility level measurement and reporting of energy key performance indicators (KPI’s).
4. Coordinate NEEA’s offerings and staff with Energy Trust outreach, technical studies and incentives, to help tie sound energy management to resource acquisition.

2009 PLANNED ACTIVITIES:

- The NEEA industrial initiative is a multi-year venture. Over time we can expect more firms to participate and the participants to permanently incorporate energy management practices and actions into their organizational structure and directives.

TARGETS:

Year	Annual Electric Expense \$M	Electric			
		aMW	MWh	\$M/aMW	Levelized Cost (\$/kWh)
2007 Full-Year Forecast	\$ 0.9	1.30	11,432	\$0.71	\$0.011
2008 Proposed Budget	\$ 0.9	0.81 - 1.07	7,054 - 9,405	\$ 1.18 - \$ 0.88	\$ 0.018 - \$ 0.013
2009 Projection	\$ 0.9	0.72 - 0.96	6,299 - 8,399	\$ 1.19 - \$ 0.89	\$ 0.018 - \$ 0.013

(see budget details on reverse)

ENERGY EFFICIENCY 2008 REVISED ACTION PLAN/BUDGET



**The Energy Trust of Oregon, Inc
Statement of Functional Expense
2008 Budget
Market Transformation (NEEA) - Industrial**

	2007 Actual	2008 Budget	2009 Projection
PMC Costs			
Delivery	\$871,477	\$894,737	\$798,965
Total PMC Costs	871,477	894,737	798,965
Staffing	2,898	4,409	4,673
Other Services			
Evaluation and Planning Services	9,680	18,009	17,728
Total Other Services	9,680	18,009	17,728
General			
General Program Support Costs		933	933
Shared	243	311	246
IT Services		684	670
Total General	243	1,928	1,849
PROGRAM DIRECT COSTS	884,299	919,083	823,216
Allocated mgmt & general marketing	40,242	30,400	29,526
TOTAL EXPENSE, FULLY ALLOCATED	924,541	949,483	852,742

PROGRAM: BIOPOWER

PURPOSE: Acquisition of significant amounts of renewable energy from wood-fired and other biomass generation; and development of markets for less mature energy resources such as dairy manure and forest biomass.

PROGRAM STRATEGY:

1. Perform targeted market analyses where necessary to fill in knowledge gaps.
2. Focus on sawmills and facilities using other sources of wood waste to acquire significant quantities of renewable energy.
3. Target upgrades at existing wastewater treatment plants to build capacity in PGE territory, and explore opportunities at such facilities in Pacific Power territory. Work with Energy Trust’s energy efficiency programs and create strategic partnerships with local and regional trade associations.
4. In partnership with Oregon Dairy Farmers Association and OSU Dairy Extension Office, assist dairy community in exploring project opportunities and initiating project development. Coordinate offerings with Energy Trust efficiency programs.
5. Seek opportunities to position biogas projects as innovative waste management solutions receiving mixed waste streams including food processing waste, animal byproducts, human wastewater, manure and other organic material.
6. Offer cost-shared support for feasibility analyses to help potential applicants identify opportunities, where possible by leveraging other sources of funding (e.g., U.S. Department of Agriculture, Western Governors’ Association and the Oregon Economic and Community Development Department).
7. Where appropriate, provide facilities that lack technical resources with assistance in applying for Energy Trust or other funding.
8. Remain engaged in forest biomass, participating in state initiatives while continuing to engage the Lake County Initiative and Warm Springs Biomass efforts.

2008 ACTIONS:

1. Begin commercial operation at Rough & Ready and Columbia Blvd. projects.
2. Roll out Dairy Initiative, including standard financial incentive offer.
3. Develop strategic partnership with wastewater sector, and explore potential for an “Energy Independence” campaign for wastewater treatment plants based on best efficiency practices and onsite generation.
4. Commit funding for 8 projects, totaling 4.00 – 9.31 aMW, and 12 feasibility studies.

2009 ACTIONS:

1. Begin commercial operation at Warm Springs Biomass.
2. Scale down standard WWTP. Focus on dairy, wood and innovative waste management projects (which could include WWTPs).

TARGETS:

Year	Annual Electric Activity \$M	Energy Generation		
		aMW	MWh	\$M/aMW
2007 Full-Year Forecast	\$0.5	-	-	
2008 Proposed Budget	\$10.9	4.00 - 9.31	35,068 - 81,553	\$ 2.71 - \$ 1.17
2009 Projection	\$3.3	0.55 - 1.62	4,817 - 14,186	\$ 5.96 - \$ 2.02

(see budget details on reverse)

Note: Budget figures include dedicated funds

RENEWABLE ENERGY 2008 REVISED ACTION PLAN/BUDGET



**The Energy Trust of Oregon, Inc
Statement of Functional Expense
2008 Budget
Biopower**

	2007 Actual	2008 Budget	2009 Projection
Program Management Costs			
Incentives	\$177,996	\$1,132,815	\$3,687,500
Total Program Management Costs	177,996	1,132,815	3,687,500
Staffing	146,069	263,174	278,964
Marketing	24,114	34,650	29,150
Other Services			
Evaluation and Planning Services	19,730	116,005	100,884
QA-Subcontracted		6,600	19,500
Legal Services	11,278	26,250	17,500
Other Professional Services	38,058	299,400	208,100
Total Other Services	69,066	448,255	345,984
General			
General Program Support Costs	8,671	28,000	13,750
Shared	15,793	23,841	18,837
IT Services	28,880	52,653	51,592
Total General	53,344	104,494	84,179
PROGRAM DIRECT COSTS	470,589	1,983,388	4,425,777
Allocated mgmt & general marketing	21,145	65,604	158,739
TOTAL EXPENSE, Accounting Perspective	491,734	2,048,992	4,584,516
Plus/minus Dedicated Funds committed for future years	-	8,802,185	(1,307,500)
TOTAL EXPENSE, Action Plan Perspective	491,734	10,851,177	3,277,016

PROGRAM: OPEN SOLICITATION

PURPOSE: Develop a portfolio of market-defining installations, each element of which demonstrates a new application, technology or business model not otherwise covered by Energy Trust programs, provides insight on whether and how to launch new, technology-specific Energy Trust programs, and/or secures a low-cost renewable energy resource. Contributes to Energy Trust strategic goals 2, 3 and 5.

PROGRAM STRATEGY:

1. Offer a program to help ensure that eligible good ideas do not “fall through the cracks.”
2. Focus on outreach and lead generation, particularly for hydro and geothermal projects.
3. Make funds available for feasibility studies. When possible, work in concert with the Oregon Economic and Community Development Department’s Renewable Energy Feasibility Fund (REFF).
4. Conduct specific outreach to municipalities in the PGE service territory to develop municipal hydro projects.
5. Assist selected applicants in further developing proposals.

2008 ACTIONS:

1. Complete approved projects.
2. Complete evaluations of existing applications for a geothermal project, hydro project, and other applications that arrive late in 2007.
3. Conduct an RFP for feasibility studies for municipal hydro projects.
4. Provide assistance to enable more municipalities in the PGE service territory to apply for funding from REFF and to help municipalities in PAC territory file more successful applications.
5. Continue outreach and communication work to municipalities to build the pipeline and to make sure we are aware of projects that may be coming in.
6. Determine what role, if any, Energy Trust will play in development of wave power projects.

2009 PLANNED ACTIVITIES:

1. Fund projects that result from feasibility studies conducted in 2007 and 2008.
2. Support wave power project(s) based on information gathered in 2008.
3. Examine possibilities for “spinning off” hydropower into its own program.

TARGETS:

Year	Annual Electric	Energy Generation		
		aMW	MWh	\$M/aMW
2007 Full-Year Forecast	\$0.5	0.01	50	54.43
2008 Proposed Budget	\$9.0	2.07 - 3.18	18,097 - 27,842	\$ 4.34 - \$ 2.82
2009 Projection	\$2.8	0.57 - 0.88	5,012 - 7,711	\$ 4.91 - \$ 3.19

(see budget details on reverse)

Note: Budget figures include dedicated funds

RENEWABLE ENERGY 2008 REVISED ACTION PLAN/BUDGET



**The Energy Trust of Oregon, Inc
Statement of Functional Expense
2008 Budget
Open Solicitation**

	2007 Actual	2008 Budget	2009 Projection
Program Management Costs			
Delivery		\$60,000	
Incentives	238,590	8,188,635	2,338,627
Total Program Management Costs	238,590	8,248,635	2,338,627
Staffing	110,245	220,603	233,839
Marketing	4,596	22,500	48,300
Other Services			
Evaluation and Planning Services	10,320	80,829	93,819
QA-Subcontracted		20,000	20,000
Legal Services	2,912	30,000	
Other Professional Services	114,652	203,500	200,150
Total Other Services	127,884	334,329	313,969
General			
General Program Support Costs	2,516	29,200	33,600
Shared	13,695	23,116	18,265
IT Services	22,886	51,057	50,028
Total General	39,097	103,373	101,893
PROGRAM DIRECT COSTS	520,412	8,929,440	3,036,628
Allocated mgmt & general marketing	23,909	295,359	108,915
TOTAL EXPENSE, Accounting Perspective	544,321	9,224,799	3,145,543
Plus/minus Dedicated Funds committed for future years	-	(264,500)	(338,626)
TOTAL EXPENSE, Action Plan Perspective	544,321	8,960,299	2,806,917

PROGRAM: SOLAR ELECTRIC (PHOTOVOLTAIC)

PURPOSE: Transform the solar electric market for all sectors in Oregon by expanding participation, providing quality standards and ensuring there is a strong qualified installer base for consumers. Contributes to Energy Trust goals 2, 3 and 5.

PROGRAM STRATEGY:

1. Leverage increased state and strong federal tax benefits for businesses to expand the commercial sector.
2. Support 3rd party ownership model to expand into high visibility nonprofit/government sector.
3. Provide quality standards for consumers to rely on.
4. Foster growth in the installer base to maintain balance between local supply and demand.
5. Expand market opportunities to include homebuilders and commercial architects/engineers.
6. Leverage City of Portland Solar Now! campaign to increase participation in PGE territory.

2008 ACTIONS:

1. Expand market opportunities:
 - a) Offer project support for governments and nonprofits seeking 3rd party investors.
 - b) Establish guidelines for Energy Trust participation in large (1-2+ MW) solar projects.
 - c) Offer intensive support for selected home builders. Promote successful solar home developments.
 - d) Cross promote solar with all energy efficiency programs, coordinate targeted customer sector outreach.
2. Maintain high level of publicity for solar. Continue targeted outreach to PGE customers:
 - a) Continue effective solar workshops (outsourced to Solar Oregon), primarily in PGE territory.
 - b) Develop new messages based on 2007 focus group results.
 - c) Work with Solar Now! to promote commercial solar through established business groups/networks.
 - d) Continue support for solar home tours, Green + Solar magazine and NW Solar Expo.
 - e) Continue coop ad incentives for trade allies.
3. Expand the installer base:
 - a) Increase installer training available locally (outsourced to OSEIA); continue to promote best installation practices.
 - b) Build relationships with large national integrators, including 3rd party owners, moving into Oregon.
 - c) Encourage growth in residential installer base by sponsoring expansion of LRT apprenticeship program.

2009 PLANNED ACTIVITIES:

1. Adjust incentives and activities to respond to changes in federal tax credits after 12/31/08.
2. Manage incentive levels to provide predictable and stable market with equity between sectors.
3. Strive to quantify and demonstrate the value that solar energy systems add to a home in Oregon's market.

TARGETS:

Year	Annual Electric	Energy Generation		
		aMW	MWh	\$M/aMW
2007 Full-Year Forecast	\$2.5	0.15	1,289	16.65
2008 Proposed Budget	\$9.1	0.47 - 0.62	4,106 - 5,475	\$ 19.40 - \$ 14.55
2009 Projection	\$5.5	0.35 - 0.47	3,090 - 4,120	\$ 15.47 - \$ 11.60

(see budget details on reverse)

RENEWABLE ENERGY 2008 REVISED ACTION PLAN/BUDGET



**The Energy Trust of Oregon, Inc
Statement of Functional Expense
2008 Budget
Solar Electric (Photovoltaic)**

	2007 Actual	2008 Budget	2009 Projection
Program Management Costs			
Delivery	\$63,309	\$39,500	\$40,685
Incentives	1,749,537	7,782,118	4,257,500
Total Program Management Costs	1,812,846	7,821,618	4,298,185
Staffing	169,574	251,442	266,529
Marketing	191,694	209,600	192,157
Other Services			
Evaluation and Planning Services	16,343	109,375	106,171
Customer Service & Trade Ally Support	30,826	82,384	72,136
Legal Services	1,760		
Other Professional Services	59,823	173,300	182,104
Total Other Services	108,752	365,059	360,411
General			
General Program Support Costs	18,543	55,750	60,641
Shared	26,534	30,373	23,998
IT Services	39,959	67,088	65,736
Total General	85,036	153,211	150,375
PROGRAM DIRECT COSTS	2,367,902	8,800,930	5,267,657
Allocated mgmt & general marketing	129,101	291,108	188,934
TOTAL EXPENSE, Accounting Perspective	2,497,003	9,092,038	5,456,591
Plus/minus Dedicated Funds committed for future years	-	-	-
TOTAL EXPENSE, Action Plan Perspective	2,497,003	9,092,038	5,456,591

PROGRAM: UTILITY-SCALE PROJECTS

PURPOSE: Large-scale acquisition

PROGRAM STRATEGY:

- I. Phase out the program per SB 838 and focus on projects of 20 MW and less.

2008 ACTIONS:

1. Finish out current funding contracts for Biglow Canyon and GoodNoe Hills wind projects including reporting, review and inspection obligations.
2. Monitor projects over time.
3. Fulfill ongoing reporting responsibilities.

2009 PLANNED ACTIVITIES:

1. Monitor projects over time.
2. Fulfill ongoing reporting responsibilities.

TARGETS:

Year	Annual Electric	Energy Generation		
		aMW	MWh	\$M/aMW
2007 Full-Year Forecast	\$6.4	46.77	409,742	0.14
2008 Proposed Budget	\$0.2	0.00 - 0.00	- - -	- - -
2009 Projection	\$0.0	0.00 - 0.00	- - -	- - -

(see budget details on reverse)

Note: Budget figures include dedicated funds

RENEWABLE ENERGY 2008 REVISED ACTION PLAN/BUDGET



**The Energy Trust of Oregon, Inc
Statement of Functional Expense
2008 Budget
Utility Scale**

	2007 Actual	2008 Budget	2009 Projection
Program Management Costs			
Incentives	\$6,000,000	\$4,373,000	
Total Program Management Costs	6,000,000	4,373,000	0
Staffing	70,516	7,112	7,539
Marketing		6,400	
Other Services			
Evaluation and Planning Services	15,212		
Legal Services	9,879		
Other Professional Services	54,714	50,500	27,200
Total Other Services	79,805	50,500	27,200
General			
General Program Support Costs	4,242	9,560	5,600
Shared	6,823	518	410
IT Services	15,257	1,140	1,117
Total General	26,322	11,218	7,127
PROGRAM DIRECT COSTS	6,176,643	4,448,230	41,866
Allocated mgmt & general marketing	258,283	147,135	1,502
TOTAL EXPENSE, Accounting Perspective	6,434,926	4,595,365	43,368
Plus/minus Dedicated Funds committed for future years	-	(4,373,000)	-
TOTAL EXPENSE, Action Plan Perspective	6,434,926	222,365	43,368

PROGRAM: WIND

PURPOSE: Expansion of the opportunities for wind from the current market models, transforming markets to bring development and construction of distributed generation and projects of varying, smaller sizes and alternative ownership models. Contributes to Strategic Plan goals 3, 4, 5 & 6.

PROGRAM STRATEGY:

1. Confirm sufficient wind resources through anemometer loans and support for Oregon State University’s wind monitoring lab.
2. Provide simplified wind resource tool for small wind.
3. Develop financial and business models to help rural Oregon communities and landowners become project sponsors.
4. Define a standard incentive offer or open solicitation to seed market development.
5. Build the pipeline of future projects, partnering with USDA on feasibility grants and analyses.
6. Break down knowledge barriers by providing consolidated, Oregon-specific information for project sponsors.

2008 ACTIONS:

1. Bring to fruition 1-2 community wind projects.
2. Identify 2-3 PGE 10 MW projects for 2009.
3. Continue the expanded anemometer loan program to support community wind with data analysis and taller anemometers for the tier-two projects from the 2006 RFP.
4. Provide support for additional feasibility studies to continue building the pipeline of potential Community Wind projects.
5. Distribute the second edition of the Community Wind Guidebook.
6. Continue to partner with ODOE to gain federal co-funding of projects and studies.
7. Partner with Oregon farm groups and state agencies to co-promote the program.
8. Conduct one in-depth case study with financial fact sheet.
9. Address transmission and distribution barriers to bring BPA and Co-op wind resources to PGE.
10. Continue providing the industry with support to address interconnection issues.
11. Provide incentives for 7-10 small wind projects.
12. Evaluate the effectiveness of using wind map data for evaluating wind resources for small wind.
13. Expand the number of small wind contractors participating in the Small Wind Trade Ally network.
14. Hold 2-3 Small Wind Trade Ally training sessions.
15. Hold 2-3 Small Wind Workshops to give information for interested participants.

2009 PLANNED ACTIVITIES:

1. Have a fully operational program for community wind development with standard incentive or open solicitation.
2. Implement program revisions based on 2007/2008 experience.
3. Bring projects to fruition that were proposals in 2006 and 2007.
4. Grow the small-scale on-site generation program.

TARGETS:

Year	Annual Electric	Energy Generation		
		aMW	MWh	\$M/aMW
2007 Full-Year Forecast	\$0.4	0.00	-	
2008 Proposed Budget	\$5.9	2.92 - 4.17	25,558 - 36,512	\$ 2.03 - \$ 1.42
2009 Projection	\$3.4	1.87 - 2.67	16,349 - 23,356	\$ 1.81 - \$ 1.26

(see budget details on reverse)

RENEWABLE ENERGY 2008 REVISED ACTION PLAN/BUDGET



**The Energy Trust of Oregon, Inc
Statement of Functional Expense
2008 Budget
Wind**

	2007 Actual	2008 Budget	2009 Projection
Program Management Costs			
Delivery	\$53,265	\$98,000	\$95,000
Incentives	39,571	5,027,400	2,553,000
Total Program Management Costs	92,836	5,125,400	2,648,000
Staffing	168,704	216,691	229,693
Marketing	3,207	18,550	54,150
Other Services			
Evaluation and Planning Services	40,591	109,008	92,027
Legal Services	1,291	45,500	
Other Professional Services	27,633	123,100	131,500
Total Other Services	69,515	277,608	223,527
General			
General Program Support Costs	10,617	21,900	33,950
Shared	21,033	21,768	17,199
IT Services	27,063	48,070	47,101
Total General	58,713	91,738	98,250
PROGRAM DIRECT COSTS	392,975	5,729,987	3,253,620
Allocated mgmt & general marketing	22,536	189,531	116,698
TOTAL EXPENSE, Accounting Perspective	415,511	5,919,518	3,370,318
Plus/minus Dedicated Funds committed for future years	-	-	-
TOTAL EXPENSE, Action Plan Perspective	415,511	5,919,518	3,370,318

2008 REVISED ACTION PLAN/BUDGET



DEPARTMENT: **PLANNING AND EVALUATION** **ALL PROGRAMS**

PURPOSE: To provide strategic and quantitative planning, reporting, and evaluation for Energy Efficiency and Renewable Resources. Contributes to all Energy Trust Strategy goals.

STRATEGY:

1. Assess and prioritize new ideas and directions for meeting the evolving efficiency and renewable energy missions.
2. Increase program success by developing and coordinating enhanced market research capabilities.
3. Provide program design staff with expert feedback to enhance programs from evaluations and market studies.
4. Expand the list of qualifying prescriptive measures, including an increasing number of technology field tests.
5. Work with utilities to plan for additional efficiency funding and coordinate renewable energy activities through the integrated resource planning processes.
6. With utilities, explore and coordinate community-based efficiency opportunities and EE/RE options to defer transmission and distribution investments.

2008 ACTIONS:

1. Work with utilities to streamline access to customer information.
2. Develop market intelligence data set
3. Develop demographic data sets for market research focused on customer targeting.
4. Support and coordinate program-initiated market research focused on refining customer offerings and messaging.
5. Continue to use evaluations as pivotal market intelligence assets and to report accomplishments and refine programs.
6. Work regionally and nationally to harmonize approaches to markets and bring important new technologies forward.
7. Work with NW Natural to assess the hedge value of gas efficiency against volatility and high prices.
8. Complete market transformation analyses for additional markets to assess the relationship between Energy Trust goals and market transformation.

2009 PLANNED ACTIVITIES:

- Focus on market acceleration and more hard-to-reach markets.

TARGETS:

Year	Annual Expense \$M	
2007 Full-Year Forecast	\$	1.5
2008 Proposed Budget	\$	3.2
2009 Projection	\$	3.0

(see budget on reverse side of page)

2008 REVISED ACTION PLAN/BUDGET



**The Energy Trust of Oregon, Inc
Planning & Evaluation
2008 Budget**

	2007 Actual	2008 Budget	2009 Projection
Department P&E			
Evaluation Services	652,412	1,425,000	1,170,000
Planning Services	125,529	250,000	335,000
Total P&E Department, non-general (nc	777,941	1,675,000	1,505,000
General P&E			
Evaluation Services	48,284	231,000	172,000
Planning Services	14,102	133,000	142,000
Staffing	512,369	844,723	895,406
Other Services	5,096		
General	19,283	34,000	32,000
Allocations	161,468	287,343	264,836
Total General Planning & Eval Services	760,602	1,530,066	1,506,242
GRAND TOTAL	1,538,542	3,205,066	3,011,242

2008 REVISED ACTION PLAN/BUDGET



DEPARTMENT: INFORMATION TECHNOLOGY ALL PROGRAMS

PURPOSE: To provide reliable and efficient technical infrastructure in support of Energy Efficiency, Renewable Resources, and Energy Trust management, helping strengthen program management through effective project, budget, data collection and reporting tools. Contributes to all strategic goals.

STRATEGY:

1. Strengthen the IT governance processes and align IT with ETO strategies, goals and objectives.
2. Partner with management, staff and PMCs to continually evolve systems to meet changing business requirements.
3. Establish and maintain highly flexible systems in support of distributed program delivery, performance analysis and stakeholder reporting.
4. Apply appropriate technology to streamline data intake processes, simplify participation and maximize data quality and consistency.
5. Improve customer service.
6. Maintain secure systems to protect confidential information.
7. Provide reliable communication systems and IT infrastructure.
8. Maintain technology refresh cycles to assure efficient and reliable operation of equipment and software.
9. Establish reasonable benchmarks for IT disaster recovery.

2008 ACTIONS:

1. Develop an IT strategic plan for long-term information systems enhancement.
2. Collaborate with Finance to investigate alternatives to the current financial, budgeting and contract management systems and to select and begin implementation of software enhancements or replacement applications.
3. Investigate alternatives to the Goldmine contact management system to provide a more integrated and efficient means of tracking participant contact information.
4. Establish an IT Governance Committee and process to assist in aligning IT resources with business strategies and objectives.
5. Facilitate IT Advisory Committee meetings as a user forum to foster innovative ideas and strategic direction.
6. Strengthen the IT organizational structure through re-alignment of positions, conversion of temporary and contract positions to staff positions and by investing in existing staff leadership, training and technical skills.
7. Simplify ETO participant forms and to extent possible, integrate with ODOE and federal tax credit participant application forms.
8. Develop capability to accept incentive applications via Web interface and leverage that technology to simplify the application process for ETO, ODOE, and federal incentives and tax credits.
9. Continue FastTrack enhancements to improve efficiency, automate data capture and evolve platforms.
10. Strengthen administration tools to improve customer service, support audit requirements, and enhance efficiency.
11. Implement a new Helpdesk tracking system and assure prompt and appropriate response to user assistance needs.
12. Evaluate a web based front end to FastTrack.
13. Develop an IT disaster recovery plan.
14. Develop IT operational and performance metrics.
15. Implement a customer survey process to measure satisfaction with current IT systems and processes.

2009 PLANNED ACTIVITIES:

1. Complete implementation of financial and contact management systems changes selected in 2008
2. Evaluate conversion of FastTrack code base from Delphi to newer software technology and begin conversion process.

TARGETS:

Year	Annual Expense \$M	
2007 Full-Year Forecast	\$	1.3
2008 Proposed Budget	\$	2.3
2009 Projection	\$	2.2

(see budget on reverse side of page)

2008 REVISED ACTION PLAN/BUDGET



**Energy Trust of Oregon, Inc.
2008 Budget
Information Technology**

	2007 Actual	2008 Budget	2009 Projection
Staffing	\$569,919	\$1,041,329	\$1,103,809
Services			
Other Professional Services	406,629	715,800	594,300
Total Services	406,629	715,800	594,300
General			
General Program Support Costs	267,238	400,896	439,628
Shared	83,290	122,317	96,646
Total General	350,528	523,213	536,274
TOTAL EXPENSE (Note I)	1,327,076	2,280,342	2,234,383

Note I - 100% of these costs are allocated to programs and other support functions.

2008 REVISED ACTION PLAN/BUDGET



DEPARTMENT: COMMUNICATIONS & OUTREACH

PURPOSE: Outreach and communications activities support all programs and general Energy Trust visibility needs. The 2008 budget provides for staff, services and materials necessary to achieve this purpose. Contributes to all strategic goals.

STRATEGY:

1. Expand utility collaboration to reach their customers with Energy Trust program messages.
2. Leverage resources and impacts by sponsoring outreach events in cooperation with peer and stakeholder organizations.
3. Position Energy Trust as an energy resource through story placements and limited advertising in Oregon media outlets.
4. Leverage relationships with associations representing niche market groups to reach prospective customers.
5. Accelerate communication support to meet growing demands with new contractors.
6. Improve website design, content and usability to serve a growing audience of participants, potential participants, trade allies and stakeholders.
7. Control website and publication costs by supplementing staff resources with free-lance contractors.
8. Facilitate development of comprehensive program communication plans to ensure integrated outreach.
9. Offer excellent customer service through call centers and email.
10. Develop Energy Trust trade ally network and improve both efficiency and service.
11. Build community relationships by developing community energy project(s) with utilities, cities and other stakeholders.
12. Use market research tools to refine strategies for program outreach to prospective participants.

2008 ACTIONS:

1. Design, review, approve and track Energy Trust communication and marketing activities across all programs.
2. Manage Energy Trust media relations on behalf of all programs; produce or support media events.
3. Develop limited general advertising, general information and educational pieces.
4. Provide non-PMC programs (renewables and production efficiency) with all marketing and communication services.
5. Manage content and look, and ensure accuracy and improve usability of, www.energytrust.org.
6. Build and maintain image library of representative Energy Trust projects.
7. Produce and disseminate public annual report; help prepare quarterly reports and other special reports.
8. Produce participant mailings and acknowledgements.
9. Publish monthly e-newsletter SYNERGY (general audience) and bimonthly INSIDER (trade allies).
10. Support annual publications Green + Solar Building Oregon and Green Living.
11. Develop and maintain cooperative relationships with utilities, Oregon Department of Energy and other stakeholder and peer groups, coordinating development of co-branded materials and joint outreach/communications initiatives.
12. Participate in community activities and organizations.
13. Manage Energy Trust participation in the Corvallis community energy pilot.
14. Coordinate stakeholder and special group outreach by all programs and PMCs.
15. Manage services provided by contracted creative and public relations professionals to programs.
16. Update marketing and communications guidelines to ensure consistent look and feel in all Energy Trust material.
17. Support trade allies through training and coordination with PMC trade ally managers; conduct annual trade ally survey.
18. Provide customer support through oversight of call center operations; work with utilities on service enhancements.
19. Team with evaluation group to conduct market research and focus groups to refine market segmentation and messaging for solar, residential efficiency and commercial efficiency programs.

2009 PLANNED ACTIVITIES:

- No major changes planned for 2009

2008 REVISED ACTION PLAN/BUDGET



TARGETS:

Year	Annual Expense \$M	
2007 Full-Year Forecast	\$	0.8
2008 Proposed Budget	\$	1.0
2009 Projection	\$	1.1

**Energy Trust of Oregon, Inc.
Communications & Outreach
Budget 2008**

	2007 Actual	2008 Budget	2009 Projection
Staffing	\$395,253	\$366,263	\$388,239
Marketing			
Public Rel/Creative	22,546	31,350	34,485
Creative Services	18,050	43,000	38,500
Media Advertising	25,845	79,500	84,700
Events Co-Sponsor	23,880	30,000	27,500
Mktg Dev/Research	950		
Total Marketing	91,271	183,850	185,185
Services			
Evaluation and Planning Services		1,821	1,792
Legal Services		7,500	
Website Design & Maintenance	108,149	161,920	200,000
Other Professional Services	24,780	63,250	40,700
Total Other Services	132,929	234,491	242,492
General			
General Program Support Costs	39,503	99,000	99,330
Shared	50,952	40,220	31,779
IT Services	66,841	125,464	122,936
Total General	157,296	264,684	254,045
TOTAL EXPENSE (Note 1)	776,749	1,049,288	1,069,961

Note 1 - 100% of these expenses are allocated to programs, located at the bottom of each report on the line "Allocated mgmt & general marketing."

2008 REVISED ACTION PLAN/BUDGET



DEPARTMENT: MANAGEMENT AND GENERAL ALL PROGRAMS

PURPOSE: To provide overall management, direction and resources in support of ETO strategies and operations. Contributes to all strategic goals.

STRATEGY:

1. Create and maintain a highly efficient internal organization that provides excellent guidance, resources and operational processes for the Energy Trust board, staff and stakeholders.
2. Enhance internal and external reporting processes to provide all stakeholders with timely and transparent information relating to Energy Trust activities.
3. Ensure that all financial data and operational systems are operating effectively and securely and are producing highly reliable and timely information.
4. Ensure that all contracts, employee relations and general operations are conducted in compliance with all applicable laws and regulations.
5. Ensure Energy Trust staff receives training and resources to foster continued maximum performance and career development goals.
6. Provide infrastructure to allow for adaptive management at all levels.

2008 ACTIONS:

1. Achieve unqualified audit opinion for 2007 from independent CPA firm
2. Continue to enhance systems via process improvements, designed with flexibility and transparency in mind
 - o Re-evaluate potential "fixes" for Great Plains accounting software
 - o Evaluate alternative accounting packages, if needed
 - o Evaluate alternative budgeting/forecasting tools
 - o Evaluate alternative contract management systems
 - o Develop and initiate implementation plans for changes to systems
3. Improve internal financial systems by investing in software development to improve reporting and monitoring capabilities, especially for external financial reporting and internal contract tracking.
4. Implement new staffing plan and incorporate corresponding regulation changes
5. Assess and analyze all the internal control processes of the Energy Trust and its data integration points with contractors.
6. Invest in employee leadership and management training, reinforcing behaviors consistent with ETO values, improving communication and maintaining desirable culture and positive morale.
7. Enhance the performance review and work plan process for 2007 to reward individual performance and encourage teamwork.
8. Develop training plan based on needs and career goals identified during performance review process.
9. Achieve both PUC and JLAC/PUC performance measures for Administrative plus Program Support Costs.

2009 PLANNED ACTIVITIES:

- *Manage growth in demand with leveling of resources*
- *Facilitate completion of the five-year Management Audit*

TARGETS:

Year	Annual Expense \$M	
2007 Full-Year Forecast	\$	1.7
2008 Proposed Budget	\$	2.3
2009 Projection	\$	2.3

(see budget on reverse side of page)

2008 REVISED ACTION PLAN/BUDGET



**Energy Trust of Oregon, Inc.
2008 Budget
Management and General**

	2007 Actual	2008 Budget	2009 Projection
Staffing	\$1,028,866	\$1,262,860	\$1,340,780
Services			
Evaluation and Planning Services	13,829	19,738	19,431
Legal Services	29,734	40,500	40,500
Accounting Services	109,220	111,000	122,500
Other Professional Services	99,284	235,855	265,969
Total Services	252,067	407,093	448,400
General			
General Program Support Costs	93,854	202,155	206,171
Shared	108,568	114,335	90,339
IT Services	201,612	266,276	260,909
Total General	404,034	582,766	557,419
TOTAL EXPENSE (Note 1)	1,684,967	2,252,719	2,346,599

Note 1 - 100% of these expenses are allocated to programs, located at the bottom of each report on the line "Allocated mgmt & general marketing."