

**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.

**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 2009 and 2010.

Core:

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 initiatives- foodservice, lodging, office, healthcare, auto services, municipal, education and natural gas equipment.
5. Coordinate with ODOE to package program offerings and process Business Energy Tax Credit applications.
6. Leverage Northwest Energy Efficiency Alliance commercial sector activities.
7. Coordinate through Bonneville Power Administration program services for PUDs.
8. Continue to enhance 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.

Incremental:

1. Expand target initiatives to include operations and maintenance, congregations, commercial laundry facilities, grocery, datacenters/computing, solar thermal and solar electric.
2. Expand program offerings geographically by engaging subcontractors in central, eastern and southern Oregon.

**2009 ACTIONS:**

Core:

1. Add new targeted equipment incentives, new outreach strategies and marketing materials for current and new target initiatives.
2. Coordinate program activities across commercial sector to offer comprehensive services by target initiative.
3. Continue to align with ODOE programs to minimize differences in program requirements (e.g. BETC, SEED, High-Performance Schools).
4. Coordinate with ODOE to streamline BETC pre-certification applications process and integrate it into Energy Trust forms and program processes to better leverage BETC.
5. Continue to improve and streamline program rules, forms and participation steps for Trade Allies and participants.
6. Integrate renewable project outreach into delivery activities.
7. Coordinate program offerings and outreach activities with utility partners.

Incremental:

1. Offer expanded technical and educational resources for lighting distributors and electrical trade associations to sell more energy efficient lighting.
2. Hire additional PMC resources to expand program activity (e.g. technical, business development).

**2010 PLANNED ACTIVITIES:**

If additional funds are made available:

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

Otherwise, continue delivery of established activities commensurate with available funds, employing flexible initiatives to meet savings and funding expectations.

**TARGETS:**

Year	Annual Expense			Electric Savings				Gas Savings			
	(\$M)			Goal aMW		Levelized Cost (\$/kWh)		Goal Therms		Levelized Cost (\$/therm)	
	Electric	Gas	Total	Conserv	Stretch	Conserv	Stretch	Conserv	Stretch	Conserv	Stretch
2008 Full-Year Actual	\$7.0	\$3.3	\$10.3	4.56		\$0.025		879,287		\$0.353	
2009 Re-budget	\$16.5	\$3.6	\$20.1	7.61	10.15	\$0.027	\$0.020	760,100	1,013,467	\$0.456	\$0.342
2010 Projection	\$12.7	\$1.6	\$14.3	5.57	7.42	\$0.028	\$0.021	360,000	480,000	\$0.423	\$0.318

(See budget detail on reverse side)

**The Energy Trust of Oregon, Inc**  
**2009 Revised Budget**  
**Existing Buildings**

	<b>2008 Actual</b>	<b>2009 Approved</b>	<b>2009 Revised</b>	<b>2010 Projection</b>
<b>Delivery Costs</b>				
Program Management	\$285,403	\$232,078	\$234,111	\$213,758
Program Delivery	1,839,028	3,048,356	3,106,612	1,885,188
Marketing-PMC	662,710	655,608	918,411	402,418
Performance Comp	75,000	180,000	179,994	180,000
<b>Total Delivery Costs</b>	<b>2,862,142</b>	<b>4,116,042</b>	<b>4,439,129</b>	<b>2,681,363</b>
<b>Incentives</b>	<b>5,851,568</b>	<b>11,559,133</b>	<b>13,134,909</b>	<b>8,774,345</b>
<b>Program Mgmt Expenses</b>	<b>8,713,709</b>	<b>15,675,175</b>	<b>17,574,038</b>	<b>11,455,708</b>
<b>ETO expenses</b>				
Staffing	189,306	317,723	298,461	336,787
Marketing	224,533	296,500	328,580	304,600
Other Services	447,769	763,663	509,312	818,560
General	31,873	56,499	57,755	57,730
Allocations	362,864	811,876	648,400	803,000
<b>Sub-Total before Admin Costs</b>	<b>9,970,055</b>	<b>17,921,437</b>	<b>19,416,546</b>	<b>13,776,385</b>
Administrative Costs	363,255	596,247	697,680	531,813
<b>TOTAL EXPENSE</b>	<b>10,333,310</b>	<b>18,517,684</b>	<b>20,114,227</b>	<b>14,308,198</b>

**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.

**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 2009 and 2010.

**Core:**

1. Bolster pipeline and build program infrastructure for projects to be completed in 2010 and beyond.
2. Encourage projects enrolled in the program to be more aggressive with energy efficiency strategies.
3. Target decision makers in commercial and industrial new construction projects and major renovations of existing buildings.
4. Target architects and engineers by providing tools and resources to assist them in selling their clients on high efficiency design and equipment.
5. Streamline and enhance program processes to make the program more user friendly.
6. Enroll more projects that follow a "design-build" model.
7. 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.
8. Incorporate solar water heating and photovoltaic measures leveraging outreach and management resources. Rely on delivery support from Energy Trust solar program staff.
9. Coordinate with ODOE to package program offerings with Business Energy Tax Credits (BETC).
10. Leverage Northwest Energy Efficiency Alliance commercial sector activities to develop projects in targeted markets.
11. Provide incentives to help the market build high-performance buildings in pursuit of a net-zero standard.

**Incremental:**

1. Achieve deeper penetration in the market for small and medium-sized construction and major renovation projects.
2. 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.

**2009 ACTIONS:****Core:**

1. Release a targeted small and medium sized project development initiative with focused marketing approach.
2. Build robust relationships with market actors to minimize lost opportunities and gain deeper savings per project.
3. 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).
4. Continue to develop materials for architects and engineers to promote the program to their clients.
5. Update forms, standardize project processing protocols, and remove policies that create administrative barriers.
6. Continue to align with ODOE programs to minimize differences in program requirements (e.g. BETC, SEED, High-Performance Schools).
7. Provide outreach to encourage contractors that use a design-build approach to leverage program opportunities.
8. Continue to integrate Green Investment Fund projects with program activities.
9. Leverage NEEA Better Bricks program for program training and market actor education.
10. Offer richer incentives for projects that implement aggressive energy efficiency strategies.
11. Design and implement a Net-zero/high performance buildings pilot.
12. Add more equipment to the Standard Track incentive list as new measures become available.

**Incremental:**

1. Increase PMC staff for marketing, outreach and technical support.

**2010 PLANNED ACTIVITIES:**

If additional funds are made available:

1. Continue to aggressively recruit 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.

Otherwise, continue delivery of established activities commensurate with available funds, employing flexible initiatives to meet savings and funding expectations.

(See targets and budget detail on reverse side)

<b>TARGETS:</b>											
Year	Annual Expense			Electric Savings				Gas Savings			
	(\$M)			Goal aMW		Levelized Cost (\$/kWh)		Goal Therms		Levelized Cost (\$/therm)	
	Electric	Gas	Total	Conserv	Stretch	Conserv	Stretch	Conserv	Stretch	Conserv	Stretch
2008 Full-Year Actual	\$7.8	\$1.1	\$8.9	2.85		\$0.030		328,029		\$0.283	
2009 Re-budget	\$9.8	\$2.2	\$11.9	2.40	3.20	\$0.041	\$0.030	326,249	434,998	\$0.592	\$0.444
2010 Projection	\$11.2	\$1.2	\$12.5	2.49	3.32	\$0.045	\$0.034	213,938	285,251	\$0.503	\$0.377

**The Energy Trust of Oregon, Inc  
2009 Revised Budget  
New Buildings**

	2008 Actual	2009 Approved	2009 Revised	2010 Projection
<b>Delivery Costs</b>				
Program Management	\$38,262	\$246,995	\$226,995	\$246,322
Program Delivery	2,346,981	4,370,658	4,371,253	4,220,659
Marketing-PMC	95,491	353,645	353,646	353,645
Performance Comp	49,345	180,000	180,000	180,000
<b>Total Delivery Costs</b>	<b>2,530,079</b>	<b>5,151,299</b>	<b>5,131,894</b>	<b>5,000,626</b>
<b>Incentives</b>	<b>4,888,756</b>	<b>8,426,494</b>	<b>4,835,999</b>	<b>4,706,922</b>
<b>Program Mgmt Expenses</b>	<b>7,418,835</b>	<b>13,577,793</b>	<b>9,967,893</b>	<b>9,707,548</b>
<b>ETO expenses</b>				
Staffing	178,652	251,327	226,065	266,407
Marketing	153,052	337,500	283,549	344,025
Other Services	486,635	916,745	471,646	940,606
General	24,555	60,000	58,211	61,660
Allocations	303,773	679,834	520,361	670,649
<b>Sub-Total before Admin Cost:</b>	<b>8,565,502</b>	<b>15,823,199</b>	<b>11,527,726</b>	<b>11,990,895</b>
Administrative Costs	312,080	526,438	414,217	462,887
<b>TOTAL EXPENSE</b>	<b>8,877,582</b>	<b>16,349,637</b>	<b>11,941,943</b>	<b>12,453,782</b>

**MARKET TRANSFORMATION NORTHWEST ENERGY**

**PROGRAM: EFFICIENCY ALLIANCE (NEEA)**

**SECTOR: COMMERCIAL**

**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 commercial market sector to acquire cost-effective savings while creating sustainable and efficient purchasing patterns among commercial consumers.

**PROGRAM STRATEGY:**

1. Create and refine business cases for investment in energy efficiency as a profit center for vertically integrated real estate firms, hospitals, and grocery chains. Market to executive management through peer consultants.
2. Support with technical initiatives to enhance new building construction and operations and maintenance services.
3. Train vendors to provide efficient services and equipment, focusing on the targeted markets described above.
4. Support code enhancements based on these successes.
5. Coordinate marketing efforts with NEEA for energy efficiency opportunities that are currently a focus of Energy Trust programs (e.g. high efficiency computer power supplies).
6. Establish the viability of high efficiency building design, operations and maintenance services, and sales of efficient equipment as profitable businesses for vendors through intensive "firm focused" technical support.

**2009 ACTIONS:**

1. Continue progress in changing energy related business practices in large hospitals systems and community based hospitals by assisting with strategic energy management planning, providing education and training and technical assistance.
2. Initiate energy related business practice change within office real estate by building a strong relationship with the Building Owners and Managers Association (BOMA), providing education and training, and assisting select firms with energy management planning activities.
3. Advance integrated energy design practices with architects and design engineering firms through three or more firm focus relationships, technical assistance on 10 or more projects, and broad based education and training.
4. Promote better building operating performance with building operators and building service providers through three or more firm focus relationships, technical assistance on 10 or more projects, and education and training activities.
5. Continue to promote high efficiency computer power supplies and consider other opportunities to improve plug load efficiencies and data centers.

**2010 PLANNED ACTIVITIES:**

- The NEEA commercial initiative is a multiyear venture. Over time we can expect more firms to participate and the participants to evolve from study, to test cases, to incorporating new practices and actions into their organizational structure and directives.
- NOTE: 2010 and beyond initiatives are dependent upon refunding and prioritization within NEEA's business plan for 2010-2014.

**TARGETS:**

Year	Annual Expense			Electric Savings			
	(\$M)			Goal aMW		Levelized Cost (\$/kWh)	
	Electric	Gas	Total	Conserv	Stretch	Conserv	Stretch
2008 Full-Year Actual	\$ 1.6		\$ 1.6	0.38		\$0.048	
2009 Re-budget	\$ 1.8		\$ 1.8	0.20	0.27	\$0.099	\$0.074
2010 Projection	\$ 1.7		\$ 1.7	0.20	0.27	\$0.093	\$0.070

(see budget details on reverse)

**The Energy Trust of Oregon, Inc  
2009 Revised Budget  
Mkt Transformation (NEEA) - Commercial**

	<b>2008 Actual</b>	<b>2009 Approved</b>	<b>2009 Revised</b>	<b>2010 Projection</b>
<b>Delivery Costs</b>				
Program Delivery	\$1,570,368	\$1,605,186	\$1,728,984	\$1,605,186
<b>Total Delivery Costs</b>	<b>1,570,368</b>	<b>1,605,186</b>	<b>1,728,984</b>	<b>1,605,186</b>
<b>Program Mgmt Expenses</b>	<b>1,570,368</b>	<b>1,605,186</b>	<b>1,728,984</b>	<b>1,605,186</b>
<b>ETO expenses</b>				
Staffing	2,568	5,235	3,054	5,549
General	11			
Allocations	16,160	29,942	22,876	29,073
<b>Sub-Total before Admin Cost:</b>	<b>1,589,108</b>	<b>1,640,363</b>	<b>1,754,914</b>	<b>1,639,808</b>
Administrative Costs	57,898	54,575	63,058	63,302
<b>TOTAL EXPENSE</b>	<b>1,647,006</b>	<b>1,694,938</b>	<b>1,817,972</b>	<b>1,703,110</b>

**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, some industrial gas customers, on specific tariffs, are eligible for gas program services and incentives.

**PROGRAM STRATEGY:**

In consideration of incremental funding stemming from the passage of the Renewable Energy Act and subsequent electric and gas utility rate filing approvals, the following strategies are contemplated in this program for 2009 and 2010.

**Core:**

1. Deliver program to owners, plant engineers and design process engineers through Program Delivery Contractors (PDCs) assigned to key sectors and geographic territories.
2. Develop successful delivery strategies particular to the needs of specific industry markets.
3. Promote program participation through developing a broad offering of services that include detailed technical analysis studies, project management assistance, prescriptive high efficiency equipment incentives, and custom project incentives.
4. Develop with board approval, large-scale 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 senior managers.
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:**

1. Target measure offerings to small/medium industrial market through use of trade ally network and semi-prescriptive technology specific, incentive calculation tools.
2. Support medium/large (< 1 aMW) industrial market in development of continuous improvement of energy management practices.

**2009 ACTIONS:**

**Core:**

1. Promote service delivery and market penetration for small to medium sized industrial customers, focusing on irrigation, dairy, nursery, and manufacturing markets.
2. Expand comprehensive energy efficiency services to industrial customers by developing and offering gas efficiency services and incentives for eligible customers in Northwest Natural and Cascade Natural Gas territory.
3. Target O&M opportunities, especially in compressed air and refrigeration systems.
4. Develop and implement successful program delivery strategies for the High Tech industry.
5. Coordinate with NEEA and implement pilots to explore integration of energy management principles and practices as program offerings to drive deeper and sustained savings in industrial facilities.
6. Monitor project commitment level expenditures relative to utility funding territory and SB-838 funds and adjust PDC marketing to balance revenue project funding.
7. Improve customer relations and increase project commitment pipeline by integrating a customer focus approach to program outreach, forms, collateral, and marketing.

**Incremental**

1. Expand marketing and trade ally support for small to medium sized industrial initiative.
2. Expand training opportunities for participants through collaboration with regional organizations.

**2010 PLANNED ACTIVITIES:**

If additional funds are made available:

1. Expand services that will be coordinating efforts with the potential Community Energy and T&D deferral projects.
2. Implement strategies to reduce program management and delivery costs by optimizing PDC deployment.

Otherwise, continue delivery of established activities commensurate with available funds, employing flexible initiatives to meet savings and funding expectations.

**TARGETS:**

Year	Annual Expense			Electric Savings				Gas Savings			
	(\$M)			Goal aMW		Levelized Cost (\$/kWh)		Goal Therms		Levelized Cost (\$/therm)	
	Electric	Gas	Total	Conserv	Stretch	Conserv	Stretch	Conserv	Stretch	Conserv	Stretch
2008 Full-Year Actual	\$11.9	\$0.1	\$12.0	8.26		\$0.022		12,600		\$0.538	
2009 Re-budget	\$20.5	\$1.1	\$21.6	8.11	10.82	\$0.035	\$0.026	212,565	283,420	\$0.582	\$0.437
2010 Projection	\$17.0	\$0.2	\$17.2	6.92	9.23	\$0.035	\$0.026	36,750	49,000	\$0.711	\$0.533

(See budget detail on reverse side)

**The Energy Trust of Oregon, Inc**  
**2009 Revised Budget**  
**Production Efficiency**

	<b>2008 Actual</b>	<b>2009 Approved</b>	<b>2009 Revised</b>	<b>2010 Projection</b>
<b>Delivery Costs</b>				
Program Delivery	\$2,844,928	\$4,160,883	\$4,302,327	\$3,960,883
Performance Comp	20,000	80,800	80,800	176,547
<b>Total Delivery Costs</b>	<b>2,864,928</b>	<b>4,241,683</b>	<b>4,383,127</b>	<b>4,137,429</b>
<b>Incentives</b>	<b>7,716,412</b>	<b>14,403,311</b>	<b>14,771,311</b>	<b>10,492,311</b>
<b>Program Mgmt Expenses</b>	<b>10,581,340</b>	<b>18,644,994</b>	<b>19,154,437</b>	<b>14,629,740</b>
<b>ETO expenses</b>				
Staffing	377,396	377,080	427,559	399,705
Marketing	132,904	141,350	119,200	145,365
Other Services	225,516	457,950	581,382	642,952
General	30,567	37,464	38,220	37,944
Allocations	224,077	723,970	516,276	717,554
<b>Sub-Total before Admin Cost:</b>	<b>11,571,800</b>	<b>20,382,808</b>	<b>20,837,075</b>	<b>16,573,260</b>
Administrative Costs	421,613	678,137	748,723	639,781
<b>TOTAL EXPENSE</b>	<b>11,993,413</b>	<b>21,060,945</b>	<b>21,585,798</b>	<b>17,213,042</b>



**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 NEEA regional market transformation initiatives in the industrial market sector through NEEA’s industrial initiative to acquire cost-effective savings while embedding sustainable and efficient energy management practices among industrial consumers.

**PROGRAM STRATEGY:**

1. Focus efforts in the pulp and paper and food processing “vertical” markets.
2. Solidify broad support for energy efficiency practices through CEO led industry-wide energy roadmaps.
3. Develop Continuous Energy Improvement (CEI) as the business practice change initiative that leads to self-sustained energy management practices.
4. Leverage and collaborate with Energy Trust, US DOE, and utility resources to improve program delivery and spur growth outside the two targeted markets.
5. Train market actors to deliver energy management to industrial companies throughout the northwest.

**2009 ACTIONS:**

1. Support implementation of the Northwest Food Processors Association’s long-term industry-wide energy efficiency roadmap.
2. Move CEI-engaged companies through the CEI process in a manner that allows them to reach their energy goals and become self-sustaining in their energy management practices.
3. Support, with NEEA’s offerings and resources, the Energy Trust’s energy management pilot.
4. Begin training market actors on ISO energy management standards and CEI.

**2010 PLANNED ACTIVITIES:**

- NEEA’s industrial initiative is a multi-year strategic effort. In the next business cycle, NEEA plans on expanding industry roadmap and energy management activities into closely related energy-intensive industrial markets.
- Transition facility level energy management activities to market actors who can begin charging for energy management services.
- NOTE: 2010 and beyond initiatives are dependent upon refunding and prioritization within NEEA’s business plan for 2010-2014.

**TARGETS:**

Year	Annual Expense			Electric Savings			
	(\$M)			Goal aMW		Levelized Cost (\$/kWh)	
	Electric	Gas	Total	Conserv	Stretch	Conserv	Stretch
2008 Full-Year Actual	\$ 0.9		\$ 0.9	1.14		\$0.011	
2009 Re-budget	\$ 0.9		\$ 0.9	0.75	1.00	\$0.018	\$0.013
2010 Projection	\$ 0.9		\$ 0.9	0.75	1.00	\$0.018	\$0.013

(See budget details on reverse)

**The Energy Trust of Oregon, Inc  
2009 Revised Budget  
Mkt Transformation (NEEA) - Industrial**

	<b>2008 Actual</b>	<b>2009 Approved</b>	<b>2009 Revised</b>	<b>2010 Projection</b>
<b>Delivery Costs</b>				
Program Delivery	\$803,198	\$829,655	\$829,656	\$829,655
<b>Total Delivery Costs</b>	<b>803,198</b>	<b>829,655</b>	<b>829,656</b>	<b>829,655</b>
<b>Program Mgmt Expenses</b>	<b>803,198</b>	<b>829,655</b>	<b>829,656</b>	<b>829,655</b>
<b>ETO expenses</b>				
Staffing	2,567	5,235	3,289	5,549
Allocations	14,742	24,192	19,285	23,497
<b>Sub-Total before Admin Cost:</b>	<b>820,506</b>	<b>859,082</b>	<b>852,230</b>	<b>858,701</b>
Administrative Costs	29,895	28,582	30,623	33,149
<b>TOTAL EXPENSE</b>	<b>850,401</b>	<b>887,663</b>	<b>882,853</b>	<b>891,849</b>

**ENERGY EFFICIENCY 2009-2010 REVISED BUDGET & ACTION PLAN**



PROGRAM:	HOME ENERGY SOLUTIONS- EXISTING HOMES	SECTOR:	RESIDENTIAL
<p><b>PURPOSE:</b> Acquire cost-effective electric and gas savings by providing energy efficiency services and incentives for existing single-family, multifamily and manufactured homes.</p>			
<p><b>PROGRAM STRATEGY:</b></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 2009 and 2010.</p> <p>Base:</p> <ol style="list-style-type: none"> <li>1. Deliver program to customers by utilizing Program Management Contractor (PMC) and a statewide comprehensive network of trade allies, leveraging existing market relationships and professional service channels.</li> <li>2. Provide incentives and 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).</li> <li>3. Offer an online home energy analyzer to Energy Trust public purpose funding contributors.</li> <li>4. Provide home energy reviews to customers in areas served by the Energy Trust of Oregon.</li> <li>5. Integrate renewable product offerings into program outreach including solar assessments.</li> <li>6. Offer a robust training calendar for Trade Ally contractors.</li> <li>7. Engage realtors as trade allies for participant referrals to program services.</li> <li>8. Grow Home Performance with ENERGY STAR® and the number of BPI Certified contractors</li> </ol> <p>Incremental:</p> <ol style="list-style-type: none"> <li>1. Develop an approach to labeling a home with a score indicating its energy usage and carbon impacts.</li> <li>2. Integrate strategies to work with low income agencies where there is not enough funding for weatherization.</li> <li>3. Offer an increased incentive structure for moderate income customers.</li> <li>4. Add more services and/or device installations to home energy reviews.</li> </ol>			
<p><b>2009 ACTIONS:</b></p>			
<p>Base:</p> <ol style="list-style-type: none"> <li>1. Expand the number of trade allies participating in the Home Performance program in southern and eastern Oregon.</li> <li>2. Effectively leverage utility and manufacturer promotional activities.</li> <li>3. Engage in promotional activities with utilities to promote efficient heating systems and other efficient applications.</li> <li>4. Pursue more opportunities for gas efficiency measures to address sun setting high efficiency gas furnace incentives.</li> <li>5. Consider other behavioral energy savings pilot demonstrations.</li> <li>6. Conduct four Home Energy Make-over contests in each utility territory to promote Home Performance with ENERGY STAR and increase consumer awareness of whole house treatment.</li> <li>7. Evolve multifamily program services to focus on high value measures such as common area lighting, appliances and HVAC.</li> <li>8. Develop and conduct a second phase of market research that focuses on linking energy efficiency with greenhouse gas reduction through an energy performance score (EPS) and carbon labels that communicate how homeowners can reduce their homes' carbon footprint through energy efficiency improvements.</li> <li>9. Work with OR Housing &amp; Community Services to complete low OR income solar assistance to low income homes.</li> <li>10. Implement near-low income (200-250% of federal poverty) outreach strategy.</li> <li>11. Collaborate in the City of Portland's Clean Energy Works: Portland 500 home pilot with the Energy Advocate role being delivered by the Energy Trust's Home Energy Solutions program in concert with Home Performance contractors.</li> <li>12. Conduct a pilot to assess the energy savings from ductless heat pumps and implement, with a goal of 200 units in single family site built electric resistance heated homes and 100 units in multifamily properties.</li> </ol> <p>Incremental:</p> <ol style="list-style-type: none"> <li>1. Continue refrigerator replacement pilot efforts to other areas with incremental funds in Klamath Falls.</li> <li>2. Deploy a second round of heat pump commissioning to improve on first pilot effort.</li> <li>3. Deploy energy saver water device kits targeted at Cascade Gas customers.</li> <li>4. Fund educational "Living Wise" materials for student initiated efficiency measure installations using elementary school curricula.</li> <li>5. Pilot programmable thermostats as a potential ISM during Home Energy Reviews.</li> <li>6. Implement water heater turn down during Home Energy Reviews.</li> <li>7. Pilot specialty CFL bulbs during Home Energy Reviews.</li> </ol>			
<p><b>2010 PLANNED ACTIVITIES:</b></p>			
<p>If additional funds are made available:</p> <ol style="list-style-type: none"> <li>1. Continue further expansion of the Energy Performance Score as a core component of the program. Consider transition to EPS on homes instead of Home Energy Reviews (HERs).</li> <li>2. Further expansion of a program track serving near-low income customers.</li> <li>3. Continue funding of the Living Wise educational kits and fund curriculum development to support education children on energy efficiency, conservation and sustainability.</li> <li>4. Completion of the Clean Energy Works: Portland Pilot, and support the initiative going State-Wide.</li> </ol> <p>Otherwise, continue delivery of established activities commensurate with available funds, employing flexible initiatives to meet savings and funding expectations.</p>			

(See targets and budget detail on reverse side)

**TARGETS:**

Year	Annual Expense			Electric Savings				Gas Savings			
	(\$M)			Goal aMW		Levelized Cost (\$/kWh)		Goal Therms		Levelized Cost (\$/therm)	
	Electric	Gas	Total	Conserv	Stretch	Conserv	Stretch	Conserv	Stretch	Conserv	Stretch
2008 Full-Year Actual	\$8.6	\$8.2	\$16.8	3.42		\$0.023		1,033,753		\$0.544	
2009 Re-budget	\$11.9	\$10.5	\$22.5	2.36	3.14	\$0.043	\$0.032	984,682	1,312,909	\$0.724	\$0.543
2010 Projection	\$10.1	\$6.9	\$17.1	2.22	2.96	\$0.040	\$0.030	492,437	656,583	\$0.938	\$0.703

**The Energy Trust of Oregon, Inc**  
**2009 Revised Budget**  
**Existing Homes**

	2008 Actual	2009 Approved	2009 Revised	2010 Projection
<b>Delivery Costs</b>				
Program Management	\$485,581	\$512,227	\$1,559,151	\$527,357
Program Delivery	3,748,002	5,324,712	3,518,512	4,787,062
Marketing-PMC	557,686	848,815	1,173,487	840,766
Performance Comp	75,692	180,000	76,042	180,000
<b>Total Delivery Costs</b>	<b>4,866,961</b>	<b>6,865,754</b>	<b>6,327,191</b>	<b>6,335,186</b>
<b>Incentives</b>	<b>9,243,755</b>	<b>9,012,500</b>	<b>11,607,917</b>	<b>6,616,996</b>
<b>Program Mgmt Expenses</b>	<b>14,110,716</b>	<b>15,878,254</b>	<b>17,935,108</b>	<b>12,952,182</b>
<b>ETO expenses</b>				
Staffing	282,866	313,901	382,235	332,735
Marketing	249,962	546,784	472,613	542,317
Other Services	528,516	730,050	1,083,952	573,590
General	84,935	115,100	107,450	71,128
Allocations	996,385	1,957,015	1,691,912	1,948,998
<b>Sub-Total before Admin Cost:</b>	<b>16,253,380</b>	<b>19,541,103</b>	<b>21,673,269</b>	<b>16,420,950</b>
Administrative Costs	592,185	650,133	778,770	633,902
<b>TOTAL EXPENSE</b>	<b>16,845,565</b>	<b>20,191,236</b>	<b>22,452,039</b>	<b>17,054,852</b>

**ENERGY EFFICIENCY 2009-2010 REVISED BUDGET & ACTION PLAN**



<b>PROGRAM:</b>	<b>HOME ENERGY SOLUTIONS- NEW HOMES/PRODUCTS</b>	<b>SECTOR:</b>	<b>RESIDENTIAL</b>
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**PURPOSE:** Program targets lost energy efficiency opportunities in the residential sector. Provide the residential new home market with services and incentives, 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.

**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 2009 and 2010.

**Core:**

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 based on their energy performance, clothes washers, refrigerators (new and recycled), specialty light bulbs, other consumer electronics).
5. Conduct marketing to create consumer demand (e.g., Energy Performance Score, ads, website, education, trade shows, and school outreach).
6. Move the market preparedness for the next generation of high performance homes.
7. Integrate renewable product offerings into program outreach. Leverage delivery support from Energy Trust Renewable staff.
8. Leverage Northwest Energy Efficiency Alliance (NEEA) residential sector activities.
9. Leverage other related programs and organizations (e.g., Earth Advantage, NEEM, home builder associations).
10. Collaborate with regional and national market actors to introduce and incent new energy efficient products.

**Incremental:**

1. Increase number of consumer products incented in the marketplace.

**2009 ACTIONS:**

**Core:**

1. Increase market share of homes built more energy efficient than code requires and ENERGY STAR consumer products and lighting.
2. Provide incentives for energy efficient single and multi-family homes based on the energy performance above what code requires.
3. Provide technical guidance, training, incentives, and promotions to support high performance homes (e.g., design training and assistance, solar integration, community specs).
4. Provide performance testing and duct sealing training to HVAC installers.
5. Promote energy efficient lighting through the spring and fall BPA specialty bulb buy down and the school fundraiser.
6. Continue technical school outreach initiative.
7. Provide training to PV and solar water system installers through a partnership with Solar Oregon and OSEIA.

**Incremental:**

1. Increase participation in refrigerator and freezer recycling initiative.
2. Provide incentives for new consumer product categories such as televisions, monitors, room air conditioners, power strips, etc.

**2010 PLANNED ACTIVITIES:**

If additional funds are made available:

1. Maintain new home market transformation efforts while increasing focus on alternative strategies toward achieving low-energy homes and green communities.
2. Begin promoting LED lighting options and next generation CFL technologies.
3. Promote new viable technologies (e.g., heat pump water heaters, non-condensing gas water heaters).

Otherwise, continue delivery of established activities commensurate with available funds, employing flexible initiatives to meet savings and funding expectations.

**TARGETS:**

Year	Annual Expense			Electric Savings				Gas Savings			
	(\$M)			Goal aMW		Levelized Cost (\$/kWh)		Goal Therms		Levelized Cost (\$/therm)	
	Electric	Gas	Total	Conserv	Stretch	Conserv	Stretch	Conserv	Stretch	Conserv	Stretch
2008 Full-Year Actual	\$11.0	\$2.5	\$13.4	5.77		\$0.031		319,462		\$0.576	
2009 Re-budget	\$15.0	\$2.1	\$17.2	3.97	5.29	\$0.068	\$0.051	129,866	173,155	\$1.203	\$0.902
2010 Projection	\$15.3	\$2.1	\$17.4	4.28	5.71	\$0.065	\$0.049	90,000	120,000	\$1.735	\$1.302

(See budget detail on reverse side)

**The Energy Trust of Oregon, Inc**  
**2009 Revised Budget**  
**New Homes & Products**

	<b>2008 Actual</b>	<b>2009 Approved</b>	<b>2009 Revised</b>	<b>2010 Projection</b>
<b>Delivery Costs</b>				
Program Management	\$561,838	\$486,608	\$486,708	\$535,269
Program Delivery	4,867,186	5,918,252	5,920,772	4,781,320
Marketing-PMC	925,844	1,310,960	1,310,960	1,120,422
Performance Comp	5,000	180,000	180,000	180,000
<b>Total Delivery Costs</b>	<b>6,359,867</b>	<b>7,895,820</b>	<b>7,898,440</b>	<b>6,617,011</b>
<b>Incentives</b>	<b>5,620,750</b>	<b>7,436,107</b>	<b>6,766,176</b>	<b>7,818,814</b>
<b>Program Mgmt Expenses</b>	<b>11,980,617</b>	<b>15,331,927</b>	<b>14,664,616</b>	<b>14,435,825</b>
<b>ETO expenses</b>				
Staffing	190,665	298,129	275,374	316,016
Marketing	120,694	364,074	299,658	363,999
Other Services	81,479	422,150	344,179	413,033
General	32,454	55,700	59,725	66,675
Allocations	557,398	1,158,142	932,396	1,146,775
<b>Sub-Total before Admin Cost:</b>	<b>12,963,309</b>	<b>17,630,122</b>	<b>16,575,948</b>	<b>16,742,323</b>
Administrative Costs	472,312	586,555	595,611	646,308
<b>TOTAL EXPENSE</b>	<b>13,435,621</b>	<b>18,216,676</b>	<b>17,171,559</b>	<b>17,388,631</b>



**ENERGY EFFICIENCY 2009-2010 REVISED BUDGET & ACTION PLAN**



**The Energy Trust of Oregon, Inc  
2009 Revised Budget  
Mkt Transformation (NEEA) - Residential**

	<b>2008 Actual</b>	<b>2009 Approved</b>	<b>2009 Revised</b>	<b>2010 Projection</b>
<b>Delivery Costs</b>				
Program Delivery	\$917,102	\$803,398	\$1,303,400	\$803,398
<b>Total Delivery Costs</b>	<b>917,102</b>	<b>803,398</b>	<b>1,303,400</b>	<b>803,398</b>
<b>Program Mgmt Expenses</b>	<b>917,102</b>	<b>803,398</b>	<b>1,303,400</b>	<b>803,398</b>
<b>ETO expenses</b>				
Staffing	2,759	6,980	4,307	7,399
Allocations	26,965	41,852	34,106	40,635
<b>Sub-Total before Admin Costs</b>	<b>946,826</b>	<b>852,230</b>	<b>1,341,813</b>	<b>851,433</b>
Administrative Costs	34,497	28,354	48,214	32,868
<b>TOTAL EXPENSE</b>	<b>981,323</b>	<b>880,584</b>	<b>1,390,027</b>	<b>884,301</b>



**RENEWABLE ENERGY 2009-2010 REVISED BUDGET & ACTION****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. Increase generation at waste water treatment plants by supporting initiatives to utilize excess digester capacity and co-digestion.
3. Expand the Dairy Initiative to include anaerobic digestion of all agricultural residues with particular focus on projects that address existing environmental challenges.
4. Focus on long term opportunities in wood products industries to replace natural gas usage with local wood waste resources to expand renewable generation.
5. Target feasibility funding to projects that expand fuel supply, support innovative waste management solutions and address current environmental issues.
6. Remain engaged in forest biomass development, participating in state and regional initiatives that support expanding this resource.
7. Expand technical and financial support for the utility interconnection process.

**2009 ACTIONS:**

1. Develop expanded generation capacity at two waste water treatment plants utilizing co-digestion of multiple waste streams.
2. Develop and implement an Energy Management Systems training program for wastewater treatment plants that integrate efficiency and renewable resource development.
3. Target project opportunities in the wood products and pulp and paper industries identified in the woody biomass study being completed.
4. Continue to develop the pipeline of future projects that can be ready when markets improve.
5. Support the developing market trend toward co-digestion of agricultural wastes and third party ownership models to develop agriculture and dairy projects.
6. Direct resources to aid project developers in navigating the interconnection process.
7. Commit funding for up to 6 projects and 12 feasibility studies.

**2010 ACTIONS:**

1. Develop roles to support expanding the access to forest biomass through stewardship contracts, forest health initiatives and fuel reduction strategies.
2. Support expanded applications of anaerobic digestion to including the feasibility of Integrated Bioenergy Business Parks.

**TARGETS:**

Year	Annual Electric Activity \$M	Energy Generation		
		aMW	MWh	\$M/aMW
2008 Full-Year Forecast	\$9.3	10.74	94,079	\$0.87
2009 Proposed Budget	\$4.7	5.41 - 12.59	47,414 - 110,265	\$0.86 - \$0.37
2010 Projection	\$4.8	2.19 - 6.45	19,174 - 56,468	\$2.17 - \$0.74

Note: Budget figures include dedicated funds

(See budget details on reverse)

## RENEWABLE ENERGY 2009-2010 REVISED BUDGET &amp; ACTION


 The Energy Trust of Oregon, Inc  
 2009 Revised Budget  
 Biopower

	2008 Actual	2009 Approved	2009 Revised	2010 Projection
<b>Program Delivery Costs</b>		\$22,800	\$22,800	
<b>Incentives</b>	954,637	2,463,800	1,828,788	11,009,250
<b>ETO expenses</b>				
Staffing	148,059	243,933	211,572	258,569
Marketing	5,943	27,500	21,900	105,825
Other Services	220,578	542,551	506,519	357,846
General	10,204	21,500	23,059	19,575
Allocations	101,715	191,503	154,791	188,001
<b>Sub-Total before Admin Costs</b>	<b>1,441,137</b>	<b>3,513,586</b>	<b>2,769,430</b>	<b>11,939,065</b>
Administrative Costs	52,507	116,897	99,512	460,886
<b>TOTAL EXPENSE, Accounting Perspective</b>	<b>1,493,644</b>	<b>3,630,483</b>	<b>2,868,942</b>	<b>12,399,951</b>
Plus/minus Dedicated Funds committed for future yrs		1,051,200	1,345,034	(7,640,002)
<b>TOTAL EXPENSE, Action Plan Perspective</b>	<b>1,493,644</b>	<b>4,681,683</b>	<b>4,213,976</b>	<b>4,759,949</b>

**PROGRAM: OPEN SOLICITATION**

**PURPOSE:** Develop a portfolio of market-defining installations, each element of which demonstrates a new application, technology, market 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. Focus on outreach and lead generation, particularly for municipal and irrigation district hydro projects.
2. Implement innovative strategies for moving projects forward.
3. Make funds available for feasibility studies to develop future projects. When possible, help customers access feasibility funds available from other sources, including the State of Oregon and USDA.
4. Complete an assessment of hydropower resources with the goal of determining the desirability of creating a long-term pipeline-building and outreach effort for hydro.
5. Assist selected applicants in further developing proposals.
6. Offer a program to help ensure that eligible good ideas do not “fall through the cracks.”
7. Provide opportunities for small-scale geothermal.

**2009 ACTIONS:**

1. Develop handbooks on hydro permitting.
2. Implement innovative strategies for moving projects forward, such as providing technical assistance.
3. Use results of hydropower resource assessment to determine the feasibility and desirability of creating a long-term pipeline-building and outreach effort for hydro.
4. Complete the 4 approved projects.
5. Evaluate project applications.
6. Examine barriers that get in the way of completed feasibility studies leading to project applications. Examine the possibility of changing the OSP application process.
7. Continue short-term outreach and communication work to municipalities and rural landowners to build the pipeline and to make sure we are aware of projects that may be coming in. Link efforts with EE programs to develop joint energy ‘packages.’
8. Conduct workshops for rural small businesses to assist them in applying for USDA renewable energy project funding.
9. Provide assistance to potential project developers where project idea shows promise.

**2010 PLANNED ACTIVITIES:**

1. Fund projects that result from feasibility studies conducted in 2008 and 2009.
2. Implement long-term outreach effort for hydro.
3. Incorporate wind initiative into OSP
4. 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.
5. Provide assistance to potential project developers where project idea shows promise.

**TARGETS:**

Year	Annual Electric Activity \$M	Energy Generation		
		aMW	MWh	\$M/aMW
2008 Full-Year Forecast	\$11.4	2.22	19,440	\$5.13
2009 Proposed Budget	\$3.6	0.45 - 0.69	3,905 - 6,007	\$8.15 - \$5.30
2010 Projection	\$3.2	0.46 - 0.71	4,029 - 6,198	\$7.00 - \$4.55

Note: Budget figures include dedicated funds

(See budget details on reverse)

**RENEWABLE ENERGY 2009-2010 REVISED BUDGET & ACTION PLAN**



The Energy Trust of Oregon, Inc  
 2009 Revised Budget  
 Open Solicitation

	2008 Actual	2009 Approved	2009 Revised	2010 Projection
<b>Program Delivery Costs</b>		<b>\$70,000</b>	<b>\$70,000</b>	<b>\$20,000</b>
<b>Incentives</b>	<b>1,512,886</b>	<b>5,127,886</b>	<b>6,003,281</b>	<b>6,652,000</b>
<b>ETO expenses</b>				
Staffing	177,811	265,092	252,584	280,997
Marketing	18,942	22,600	20,599	23,278
Other Services	223,911	367,250	335,137	207,928
General	5,600	52,500	53,550	40,150
Allocations	98,508	211,313	168,153	208,277
<b>Sub-Total before Admin Costs</b>	<b>2,037,658</b>	<b>6,116,641</b>	<b>6,903,304</b>	<b>7,432,630</b>
Administrative Costs	74,241	203,501	248,051	286,923
<b>TOTAL EXPENSE, Accounting Perspective</b>	<b>2,111,899</b>	<b>6,320,142</b>	<b>7,151,356</b>	<b>7,719,553</b>
Plus/minus Dedicated Funds committed for future yrs		(2,685,886)	(3,531,281)	(4,500,001)
<b>TOTAL EXPENSE, Action Plan Perspective</b>	<b>2,111,899</b>	<b>3,634,256</b>	<b>3,620,075</b>	<b>3,219,552</b>

**PROGRAM: SOLAR ELECTRIC (PHOTOVOLTAIC)**

**PURPOSE:** Develop 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. Balance opportunities and risks presented by the many variables in the PV market.
2. Be flexible between residential and commercial opportunities as financing options evolve.
3. Build on the market stability offered by the recent 8 year extension to the federal ITC.
4. Meet similar level of activity of 2008 in 2009.
5. Prepare for budget decline in 2011.
6. Continue to support 3<sup>rd</sup> party ownership models for commercial, government and residential systems.
7. Foster continuous improvement in installation quality.
8. Encourage solar in new residential and commercial construction.

**2009 ACTIONS:**

1. Adjust incentives to manage market uncertainties:
  - a) Design multi-site incentive structure to drive or limit demand as needed.
  - b) Expand cap for standard commercial incentive beyond 100 kW to attract more investors and streamline the approval process for larger projects.
2. Cross-promote solar with energy efficiency programs:
  - a) Promote low-interest loans for EE and solar measures.
  - b) Offer residential solar home reviews in addition to EE's home energy audits.
  - c) Align solar incentives with EE incentives for new homes based on Energy Performance Score and ODOE's High Performance Homes tax credits for homebuilders.
  - d) Align solar incentives with EE incentives for Net Zero Energy commercial buildings pilot.
3. Foster development and delivery of solar installation training opportunities for new entrants.
4. Support municipalities issuing solar RFPs, leverage the high visibility of those projects.
5. Facilitate incentives for 3<sup>rd</sup> party-owned residential systems.

**2010 PLANNED ACTIVITIES:**

1. Prepare industry for transition to small 2011 incentive budget.
2. Leverage declining PV costs and rising energy prices.
3. Encourage project models that don't require Energy Trust incentives.
4. Help projects apply for federal grants.

**TARGETS:**

Year	Annual Electric Activity \$M	Energy Generation		
		aMW	MWh	\$M/aMW
2008 Full-Year Forecast	\$9.3	0.61	5,340	\$13.54
2009 Proposed Budget	\$10.3	0.55 - 0.73	4,797 - 6,396	\$18.78 - \$14.09
2010 Projection	\$9.8	0.52 - 0.70	4,586 - 6,114	\$18.80 - \$14.10

Note: Budget figures include dedicated funds

(See budget details on reverse)

**RENEWABLE ENERGY 2009-2010 REVISED BUDGET & ACTION PLAN**



**The Energy Trust of Oregon, Inc  
2009 Revised Budget  
Solar Electric (Photovoltaic)**

	2008 Actual	2009 Approved	2009 Revised	2010 Projection
<b>Program Delivery Costs</b>	<b>\$77,867</b>	<b>\$70,000</b>	<b>\$68,755</b>	<b>\$70,000</b>
<b>Incentives</b>	<b>4,351,601</b>	<b>12,469,180</b>	<b>12,469,180</b>	<b>8,313,000</b>
<b>ETO expenses</b>				
Staffing	331,918	302,166	295,382	320,296
Marketing	293,837	278,509	258,109	303,874
Other Services	136,558	387,850	338,996	104,079
General	46,950	61,900	67,947	54,827
Allocations	193,097	311,465	275,825	308,499
<b>Sub-Total before Admin Costs</b>	<b>5,431,829</b>	<b>13,881,070</b>	<b>13,774,193</b>	<b>9,474,576</b>
Administrative Costs	197,906	461,824	494,938	365,749
<b>TOTAL EXPENSE, Accounting Perspective</b>	<b>5,629,735</b>	<b>14,342,894</b>	<b>14,269,131</b>	<b>9,840,325</b>
Plus/minus Dedicated Funds committed for future yrs		(4,058,000)	(4,058,001)	0
<b>TOTAL EXPENSE, Action Plan Perspective</b>	<b>5,629,735</b>	<b>10,284,894</b>	<b>10,211,130</b>	<b>9,840,325</b>

**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.

**2009 ACTIONS:**

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

**2010 PLANNED ACTIVITIES:**

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

**TARGETS:**

Year	Annual Electric Activity \$M	Energy Generation		
		aMW	MWh	\$M/aMW
2008 Full-Year Forecast	\$4.6	30.10	263,676	\$0.15
2009 Proposed Budget	\$0.2	0.00 - 0.00	- - -	- - -
2010 Projection	\$0.0	0.00 - 0.00	- - -	- - -

Note: Budget figures include dedicated funds

(See budget details on reverse)

**RENEWABLE ENERGY 2009-2010 REVISED BUDGET & ACTION PLAN**



The Energy Trust of Oregon, Inc  
 2009 Revised Budget  
 Utility Scale

	2008 Actual	2009 Approved	2009 Revised	2010 Projection
<b>Incentives</b>	<b>\$767,387</b>	<b>\$3,885,818</b>	<b>\$3,885,818</b>	
<b>ETO expenses</b>				
Staffing	16,020		2,015	
Other Services	29,081	22,000	22,000	11,750
General	611	2,000	2,000	2,000
Allocations	1,785		123	
<b>Sub-Total before Admin Costs</b>	<b>814,882</b>	<b>3,909,818</b>	<b>3,911,955</b>	<b>13,750</b>
Administrative Costs	29,690	130,080	140,565	531
<b>TOTAL EXPENSE, Accounting Perspective</b>	<b>844,572</b>	<b>4,039,898</b>	<b>4,052,521</b>	<b>14,281</b>
Plus/minus Dedicated Funds committed for future yrs		(3,885,818)	(3,885,819)	0
<b>TOTAL EXPENSE, Action Plan Perspective</b>	<b>844,572</b>	<b>154,080</b>	<b>166,702</b>	<b>14,281</b>



**PROGRAM: WIND**

**PURPOSE:** Expansion of the opportunities for wind from the current market models, expanding 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 easier evaluation of small wind opportunities.
3. Continue a standard incentive offer for small wind to seed market development.
4. Build the pipeline of future projects, partnering with USDA on feasibility grants and analyses.
5. Break down knowledge barriers by providing consolidated, Oregon-specific information for project sponsors.
6. Expand the technology choices for wind to better match equipment to the resource and circumstance

**2009 ACTIONS:**

1. Provide incentives for 5-10 small wind projects.
2. Test opportunities to deploy re-conditioned turbines.
3. Evaluate the effectiveness of using wind map data for evaluating wind resources for small wind.
4. Expand the number of small wind contractors participating in the Small Wind Trade Ally network.
5. Evaluate the new, small wind turbines to see if more types can meet program requirements
6. Hold 2-3 Small Wind Trade Ally training sessions.
7. Support 2-3 Small Wind Trade Ally technical training sessions.
8. Hold 2-3 Small Wind Workshops to give information for interested participants
9. Be open to community wind projects that can secure turbines and financing.
10. 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.
11. Provide support for additional feasibility studies to continue building the pipeline of potential community wind projects.
12. Continue to partner with ODOE to gain federal co-funding of projects and studies.
13. Partner with Oregon farm groups and state agencies to co-promote the program.
14. Address transmission and distribution barriers to bring BPA and Co-op wind resources to PGE.
15. Continue providing the industry with support to address interconnection issues.

**2010 PLANNED ACTIVITIES:**

1. Continue to grow the small-scale, on-site generation program.
2. Implement program revisions based on 2008/2009 experience.
3. Continue a low level of support for community wind projects until turbine markets are more advantageous.
4. Bring projects to fruition that were proposals in 2008 and 2009.

**TARGETS:**

Year	Annual Electric Activity \$M	Energy Generation		
		aMW	MWh	\$M/aMW
2008 Full-Year Forecast	\$1.6	0.01	87	\$64.89
2009 Proposed Budget	\$3.4	0.41 - 0.59	3,604 - 5,148	\$8.32 - \$5.82
2010 Projection	\$2.3	0.23 - 0.33	2,015 - 2,879	\$10.16 - \$7.11

Note: Budget figures include dedicated funds

(See budget details on reverse)

**RENEWABLE ENERGY 2009-2010 REVISED BUDGET & ACTION PLAN**



The Energy Trust of Oregon, Inc  
2009 Revised Budget  
Wind

	2008 Actual	2009 Approved	2009 Revised	2010 Projection
<b>Program Delivery Costs</b>	<b>\$43,178</b>	<b>\$30,000</b>	<b>\$110,000</b>	
<b>Incentives</b>	<b>64,125</b>	<b>2,721,600</b>	<b>2,481,600</b>	<b>1,701,000</b>
<b>ETO expenses</b>				
Staffing	162,104	211,079	166,743	223,743
Marketing	10,447	19,500	17,700	20,085
Other Services	65,583	423,250	276,750	347,000
General	11,759	25,500	25,500	24,020
Allocations	93,764	167,603	136,475	164,885
<b>Sub-Total before Admin Costs</b>	<b>450,961</b>	<b>3,598,532</b>	<b>3,214,767</b>	<b>2,480,734</b>
Administrative Costs	16,431	119,723	115,514	95,764
<b>TOTAL EXPENSE, Accounting Perspective</b>	<b>467,391</b>	<b>3,718,255</b>	<b>3,330,281</b>	<b>2,576,498</b>
Plus/minus Dedicated Funds committed for future yrs	0	(297,601)	(57,600)	(240,000)
<b>TOTAL EXPENSE, Action Plan Perspective</b>	<b>467,391</b>	<b>3,420,654</b>	<b>3,272,681</b>	<b>2,336,498</b>

**2009-2010 REVISED BUDGET & ACTION PLAN**



**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. Develop innovative initiatives that will bring new opportunity in 5-20 years.
6. Work closely with utilities, BPA and others on regional initiatives that increase delivered savings in areas served by the Energy Trust.
7. Support utility resource assessment and integrated resource planning to align Energy Trust activities with utility resource plans and funding.
8. With utilities, explore and coordinate community-based efficiency opportunities and EE/RE options to defer transmission and distribution investments.

**2009 ACTIONS:**

1. Work with utilities to streamline access to customer information.
2. Refine and apply market intelligence and demographic data sets for help target programs.
3. Develop customer preference data that can be linked to demographics to improve sales effectiveness.
4. Support and coordinate program-initiated market research focused on refining customer offerings and messaging.
5. Refine understanding of renewable markets, resource potential, and program influence.
6. Continue to use evaluations as pivotal market intelligence assets and to report accomplishments and refine programs.
7. Work regionally and nationally to harmonize approaches to markets and bring important new technologies forward.
8. Complete market transformation analyses for additional markets to assess the relationship between Energy Trust actions and market transformation savings.
9. Enhance cost-effectiveness framework to incorporate more current avoided costs and a better understanding of energy efficiency influence on peak loads, and the hedge value of natural gas savings in reducing costs and volatility.

**2010 PLANNED ACTIVITIES:**

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

**SCHEDULED EVALUATIONS:**

	<b>IMPACT</b>	<b>PROCESS</b>	<b>MARKET ASSESSMENT</b>
<b>ENERGY EFFICIENCY</b>			
Business Energy Solutions – Existing Buildings	Q2 2009 & Q2 2010	Q1 2009 & Q4 2009	
Business Energy Solutions – New Buildings	Q2 2009	Q1 2010	
Production Efficiency	Q2 2009 & Q2 2010	Q2 2009 & Q2 2010	
Home Energy Solutions – Existing Homes	Q3 2009 & Q2 2010	Q2 2009 & Q2 2010	Q3 2009
Home Energy Solutions – New Homes & Products			
New Homes	Q4 2009	Q4 2009	
Products		Q4 2009	
<b>RENEWABLES</b>			
Biopower			
Open Solicitation			
Solar Electric			
Utility-Scale			
Wind		Q4 2009	

(See targets and budget details on reverse side of page)

**2009-2010 REVISED BUDGET & ACTION PLAN**



<b>TARGETS:</b>	
<b>Year</b>	<b>Annual Expense (\$M)</b>
2008 Full-Year Actual	\$ 2.4
2009 Revised Budget	\$ 3.5
2010 Projection	\$ 4.4

**The Energy Trust of Oregon, Inc  
2009 Revised Budget  
Planning & Evaluation**

	<b>2008 Actual</b>	<b>2009 Approved</b>	<b>2009 Revised</b>	<b>2010 Projection</b>
<b>Program Specific P&amp;E</b>				
Evaluation Services	\$918,179	\$1,630,000	\$1,485,857	\$1,775,000
Planning Services	316,486	357,750	262,332	395,500
Other	2,689		171	
<b>Total Program Specific P&amp;E</b>	<b>1,237,354</b>	<b>1,987,750</b>	<b>1,748,359</b>	<b>2,170,500</b>
<b>Non Program Specific P&amp;E</b>				
Evaluation Services	132,884	773,000	362,174	673,000
Planning Services	115,697	228,000	159,918	173,000
Staffing	703,830	834,730	833,783	884,814
Other Services	25,997		10,119	
General	33,625	102,285	48,092	137,285
Allocations	190,322	361,950	320,047	362,269
<b>Total Non Program Specific P</b>	<b>1,202,354</b>	<b>2,299,966</b>	<b>1,734,133</b>	<b>2,230,369</b>
<b>GRAND TOTAL</b>	<b>2,442,316</b>	<b>4,287,716</b>	<b>3,482,492</b>	<b>4,400,869</b>

**DEPARTMENT: COMMUNICATIONS & CUSTOMER SERVICE**

**PURPOSE:** Outreach and communications activities support general and cross-program Energy Trust needs. Program-specific activities are reflected in program budgets. The 2009 budget provides for staff, services and materials necessary for general outreach and communications. These activities contribute 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 a trusted energy resource through story placements and 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 of programs/Program Management Contractors.
6. Upgrade website design, content and usability and implement e-mail customer relationship management based on findings of 2008 web usability study.
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, web site, and e-mail.
10. Sustain 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. Apply market research results to refine strategies for program outreach to prospective participants.

**2009 ACTIONS:**

1. Design, review, approve and track Energy Trust communication and marketing activities across all programs.
2. Promote cross-program communications and outreach strategies such as Better Living Show, Energy Performance Score.
3. Manage Energy Trust media relations on behalf of all programs; produce or support media events.
4. Continue "Solutions" media campaign (launched in fall 2008) through March 2009. Provide coordinated media buying services for program advertising.
5. Provide non-PMC programs (renewables and production efficiency) with all marketing and communication services.
6. Manage upgrade of architecture, content and look, and ensure accuracy and usability of [www.energytrust.org](http://www.energytrust.org). Take management responsibility for online Home Energy Analyzer tool (Apogee).
7. Expand and maintain image library and quotation data base of representative Energy Trust projects.
8. Produce and disseminate public annual report; help prepare quarterly reports and other special reports.
9. Initiate ongoing communications with customers ("customer relationship management") through e-channels, including web, monthly e-newsletter SYNERGY (general audience) and bimonthly INSIDER (trade allies).
10. Sustain and further develop 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.
11. Participate in community activities and organizations through sponsorships and other collaborations.
12. Complete and begin evaluating Corvallis Energy Challenge.
13. Implement focused community outreach to Klamath Falls, and develop a toolbox of community energy materials to be made available upon request to leaders in communities throughout Oregon.
14. Provide communications/project support for Clean Energy Works: Portland and other pilots testing EEAST objectives.
15. Coordinate stakeholder and special group outreach by all programs and PMCs.
16. Manage services provided by contracted creative and public relations professionals to programs.
17. Update marketing and communications guidelines to ensure consistent look and feel in all Energy Trust material.
18. Support trade allies through training; coordinate with PMC TA managers; apply findings from annual trade ally survey.
19. Provide customer support through oversight of call center operations; work with utilities on service enhancements.
20. Team up with evaluation group to conduct market research and focus groups to refine market segmentation and messaging.

**2010 PLANNED ACTIVITIES:**

- No major changes planned for 2010.

(See targets and budget details on reverse side of page)

## 2009-2010 REVISED BUDGET &amp; ACTION PLAN

**TARGETS:**

Year	Annual Expense (\$M)
2008 Full-Year Actual	\$ 0.9
2009 Revised Budget	\$ 1.8
2010 Projection	\$ 1.4

**The Energy Trust of Oregon, Inc**  
**2009 Revised Budget**  
**Communications & Customer Service**

	2008 Actual	2009 Approved	2009 Budget	2010 Projection
<b>Staffing</b>	<b>\$346,143</b>	<b>\$567,174</b>	<b>\$502,248</b>	<b>\$601,205</b>
<b>Marketing</b>				
Public Rel/Creative	14,167	30,000	30,000	30,900
Creative Services	39,507	50,750	243,086	52,272
Media Advertising	43,012	59,800	59,800	54,642
Events Co-Sponsor	15,951	16,000	16,000	16,480
<b>Total Marketing</b>	<b>112,636</b>	<b>156,550</b>	<b>348,886</b>	<b>154,294</b>
<b>Services</b>				
Evaluation and Planning Services	1,431	2,875	2,134	2,788
Website Design & Maintenance	129,802	129,000	360,250	129,265
Other Professional Services	91,035	93,800	216,125	87,859
<b>Total Other Services</b>	<b>222,268</b>	<b>225,675</b>	<b>578,510</b>	<b>219,912</b>
<b>General</b>				
General Program Support Costs	61,962	83,600	83,885	86,108
Shared	26,767	60,104	52,249	60,104
IT Services	84,541	241,664	186,432	241,948
<b>Total General</b>	<b>173,270</b>	<b>385,369</b>	<b>322,566</b>	<b>388,160</b>
<b>TOTAL EXPENSE (Note 1)</b>	<b>854,318</b>	<b>1,334,768</b>	<b>1,752,210</b>	<b>1,363,571</b>

Note 1 - 100% of these expenses are allocated to programs, located towards the bottom of each report on the line "Administrative Costs."

Note 2 - Marketing spending *overall* increased by \$52,299 because of a shift of residential program dollars budgeted for the online Apogee tool into the general website design & maintenance budget. The increase reflected in the general Communications & Outreach re-budget reflects a re-characterization of \$453,411 previously allocated in program marketing budgets for web-redevelopment, creative services, and marketing professional services. These funds were re-characterized from program marketing to general to bring support costs in line with the PUC definition.

**2009-2010 REVISED BUDGET AND ACTION PLAN**



**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.

**2009 ACTIONS:**

1. Achieve unqualified audit opinion for 2008 from independent CPA firm
2. Improve internal financial systems by investing in software development to improve reporting and monitoring capabilities, especially for external financial reporting and internal contract tracking.
  - o Evaluate the development of an Enterprise Resource Planning solution to accommodate shortfalls in accounting, customer relationship and project tracking.
  - o Evaluate alternative budgeting/forecasting tools.
  - o Evaluate alternative contract management systems.
  - o Develop and initiate implementation plans for changes to systems.
3. Facilitate completion of the five-year Management Audit.
4. Continue to analyze and refine all the internal control processes of the Energy Trust and its data integration points with contractors.
5. Invest in employee leadership and management training, reinforcing behaviors consistent with ETO values, improving communication and maintaining desirable culture and positive morale.
6. Enhance the performance review and work plan process for 2008 to reward individual performance and encourage teamwork.
7. Develop training plan based on needs and career goals identified during performance review process.
8. Achieve both PUC and JLAC/PUC performance measures for Administrative plus Program Support Costs.

**2010 PLANNED ACTIVITIES:**

- Continue to manage growth in demand with leveling of resources
- Develop and implement action plans stemming from Management Audit

**TARGETS:**

Year	Annual Expense (\$M)
2008 Full-Year Actual	\$ 1.8
2009 Revised Budget	\$ 2.7
2010 Projection	\$ 2.9

(See budget on reverse side of page)

**2009-2010 REVISED BUDGET AND ACTION PLAN**



**The Energy Trust of Oregon, Inc  
2009 Revised Budget  
Management and General**

	<b>2008 Forecast</b>	<b>2009 Approved</b>	<b>2009 Revised</b>	<b>2010 Projection</b>
<b>Staffing</b>	<b>\$1,160,584</b>	<b>\$1,540,714</b>	<b>\$1,474,384</b>	<b>\$1,627,180</b>
<b>Services</b>				
Evaluation and Planning Services	15,510	28,750	21,896	27,880
Legal Services	16,683	35,000	29,200	36,050
Accounting Services	116,434	46,000	81,950	47,380
Other Professional Services	155,741	426,860	452,644	394,771
<b>Total Services</b>	<b>304,368</b>	<b>536,610</b>	<b>585,689</b>	<b>506,081</b>
<b>General</b>				
General Program Support Costs	80,257	252,118	218,017	239,741
Shared	75,561	128,706	120,499	128,706
IT Services	179,422	388,128	324,678	388,584
<b>Total General</b>	<b>335,240</b>	<b>768,953</b>	<b>663,194</b>	<b>757,031</b>
<b>TOTAL EXPENSE (Note 1)</b>	<b>1,800,193</b>	<b>2,846,276</b>	<b>2,723,267</b>	<b>2,890,292</b>

Note 1 - 100% of these expenses are allocated to programs, located at the bottom of each report on the line "Administrative Costs."



**2009-2010 REVISED BUDGET & ACTION PLAN**



**DEPARTMENT: INFORMATION TECHNOLOGY ALL PROGRAMS**

**PURPOSE:** To deliver value to the Energy Trust organization and our end customers through reliable and efficient information technology applications, effective project management practices and efficient and effective business processes helping strengthen Energy Trust program management contributing to all strategic goals.

**STRATEGY:**

1. Improve customer service and enhance the experience of our internal clients and external customers.
2. Strengthen and streamline core business applications.
3. Ensure a stable, reliable, and secure technology environment.
4. Enhance the effectiveness of technology investments.

**2009 ACTIONS:**

**Improve customer service**

1. Enhance the end customer experience by simplifying and evolving ETO participant forms, web versions and application processes.
2. Enhance the end user experience with self service reporting and analysis capabilities internally for levelized costs.
3. Improve IT transparency by implementing customer service and performance metrics and improving status reporting.
4. Start implementation of improved IT service management best practices using the Information Technology Infrastructure Library (ITIL) framework by implementing a consistent change management framework.
5. Facilitate the IT Advisory Committee as a forum to foster innovative ideas and strategic direction.

**Strengthen and streamline core business applications**

1. Streamline core business and systems processes by analyzing gaps and determining whether individual system replacement or implementation of a full ERP solution provides the necessary business process improvements.
2. Evolve systems to meet changing business requirements and improve efficiency and integration further automating data capture and improving flexibility, usability and re-usability.

**Ensure a stable, reliable, and secure environment**

1. Develop a Technical Architecture Roadmap to ensure as technology evolves that systems continue to meet the business needs, are easily maintainable and are technically up to date.
2. Evolve the security of our systems to provide more sophisticated protection of confidential information.
3. Evolve automated system monitoring and alerts to improve systems reliability and up time.
4. Improve technology refresh cycles to assure efficient and reliable operation of equipment and software.
5. Ensure that systems can be recovered in event of a disaster.

**Enhance the effectiveness of technology investments**

1. Evolve project management practices to improve the quality and on time/on budget delivery of projects.
2. Strengthen the alignment of IT to the Energy Trust business strategies and long term needs and evolve the IT strategic plan.
3. Evolve the IT Steering Committee and governance processes to ensure appropriate alignment of IT resources with the key business strategies and objectives.
4. Strengthen the IT organizational structure through investments in professional development and training.
5. Enable improved business decisions by improving access to and quality of operational data.

**2010 PLANNED ACTIVITIES:**

1. Complete implementation of an enterprise information system selected in 2009.
2. Continued roll out of Incentive applications on the web.
3. Continued roll out of business intelligence projects.

**TARGETS:**

Year	Annual Expense (\$M)
2008 Full-Year Actual	\$ 1.5
2009 Revised Budget	\$ 3.1
2010 Projection	\$ 3.9

(See budget details on reverse side of page)

**2009-2010 REVISED BUDGET & ACTION PLAN**



**The Energy Trust of Oregon, Inc  
2009 Revised Budget  
Informational Technology**

	<b>2008 Actual</b>	<b>2009 Approved</b>	<b>2009 Revised</b>	<b>2010 Projection</b>
<b>Staffing</b>	<b>\$785,573</b>	<b>\$1,178,254</b>	<b>\$990,272</b>	<b>\$1,248,949</b>
<b>Services</b>				
Other Professional Services	488,242	1,818,340	1,408,844	1,540,270
<b>Total Services</b>	<b>488,242</b>	<b>1,818,340</b>	<b>1,408,844</b>	<b>1,540,270</b>
<b>General</b>				
Supplies and Equipment	52,504	169,117	180,859	151,182
Software	55,675	156,238	188,298	169,068
Depreciation	55,635	302,255	89,066	514,833
Other General Expenses	27,547	124,200	121,568	128,650
Allocations	71,369	129,391	116,781	129,391
<b>Total General</b>	<b>262,731</b>	<b>881,200</b>	<b>696,572</b>	<b>1,093,124</b>
<b>TOTAL EXPENSE (Note 1)</b>	<b>1,536,546</b>	<b>3,877,794</b>	<b>3,095,687</b>	<b>3,882,343</b>

Note 1 - 100% of these costs are allocated to programs and other support functions.

The Energy Trust of Oregon  
Capital Purchases - Revised

	2009 budget	2010 projection
Technology Refresh		
Server upgrades and replacement	66,000	72,000
secure remote access SSL VPN	30,000	
Accounting/CRM/ERP Software - moved from 2009 to 2010	-	1,250,000
Servers for growth	28,000	30,000
New storage solution - NAS/SAN/EMC	11,500	40,000
Metadata Software	80,000	50,000
Disaster Recovery - Hardware and Software	10,000	10,000
Infrastructure change monitoring software (Trip Wire)	10,000	-
Development environment improvements (hardware and software)	9,500	-
Total capital purchases	245,000	1,452,000

