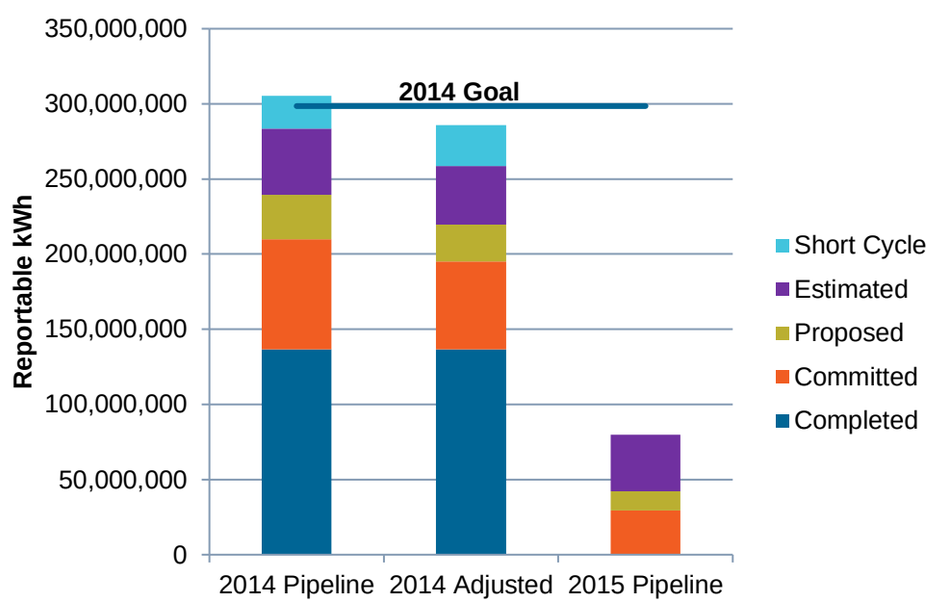
Energy Efficiency Summary *

All programs; not including NEEA

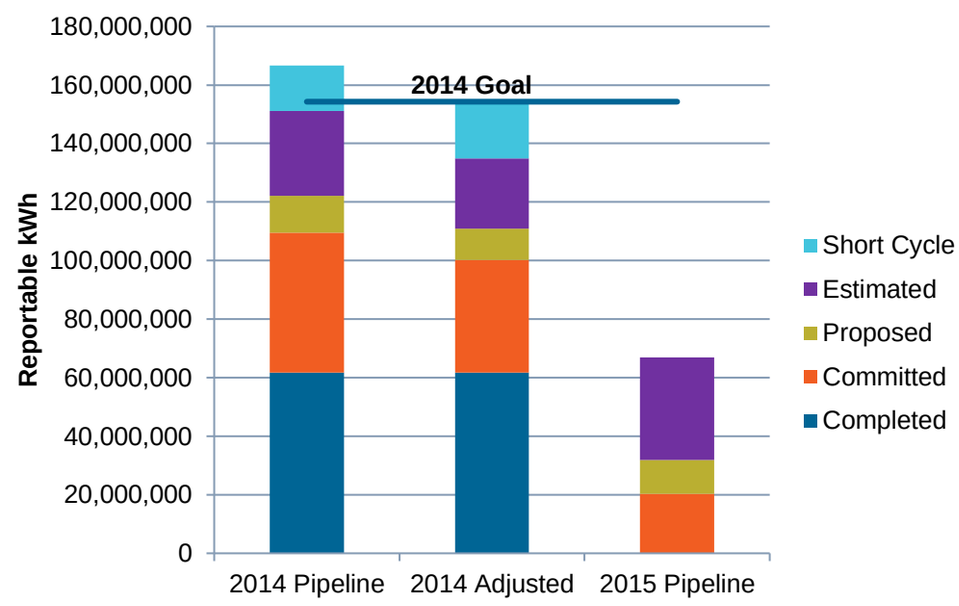
October 1, 2014

Combined Efficiency		PGE	PAC	NWN	CNG
Achievement	2014 Achievement to Date (Rpt kWh or therm)	136,470,792	61,753,551	2,417,374	188,696
	To date % of 2014 Goal	46%	40%	45%	40%
Context	Historical % of actual accomplishment	36%	45%	42%	33%
Budget	To Date % of Incentive Budget Spent	38%	39%	38%	36%

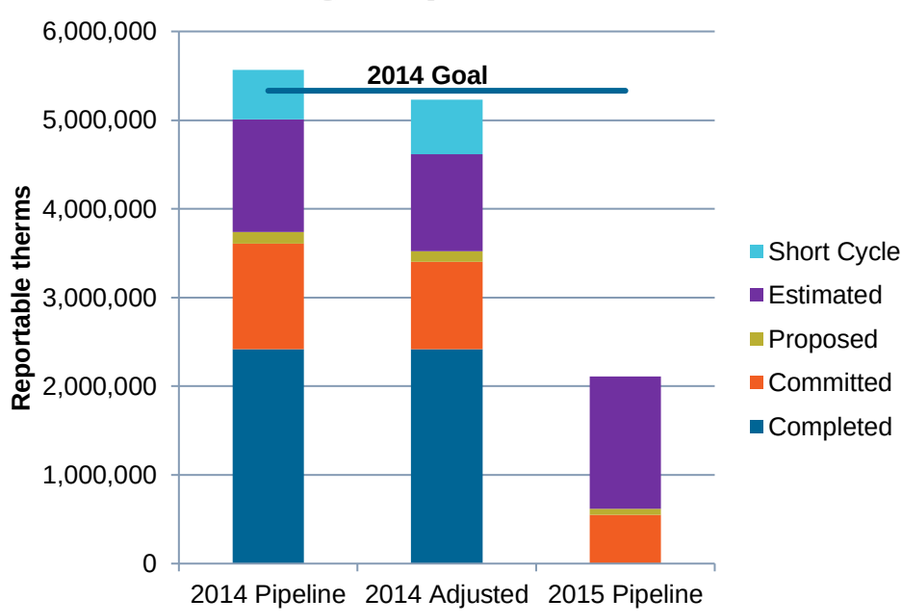
PGE Savings Pipeline 2014-2015



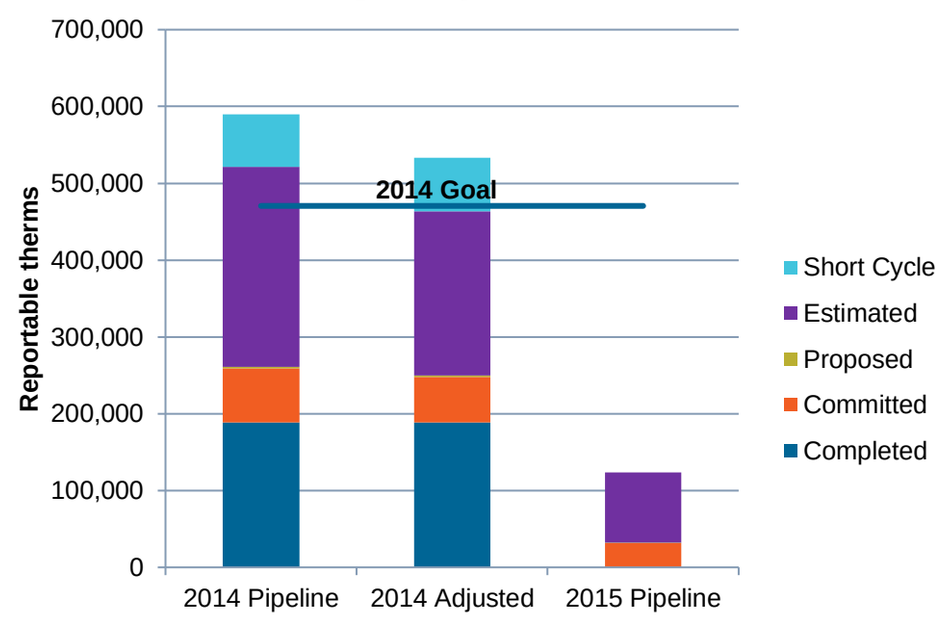
PAC Savings Pipeline 2014-2015



NWN Savings Pipeline 2014-2015



CNG Savings Pipeline 2014-2015



2014 Adjusted Pipeline percent of Goal	
PGE: 96%	**PAC:** 100%
NWN: 98%	**CNG:** 113%

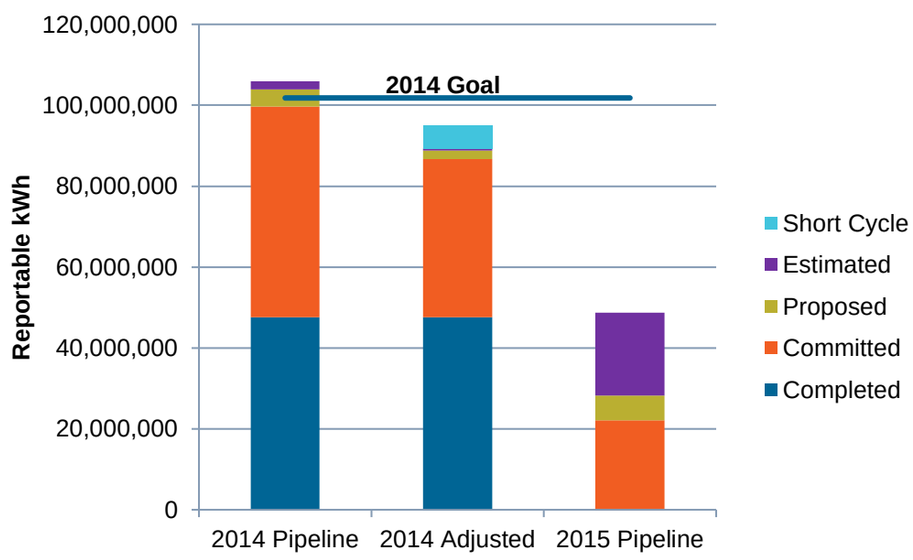
*Dashboards are a program management tool used by Energy Trust staff on a quarterly basis and represent best available data as of the date of distribution. Goals and progress to goals shown do not include savings from NEEA electric market transformation and therefore do not reflect official goals or official progress to goals. In addition, incentive spending is preliminary. Official Energy Trust data are reported in quarterly and annual reports to the Oregon Public Utility Commission, which are published online at www.energytrust.org/reports.

Industrial Sector Summary* **October 1, 2014**

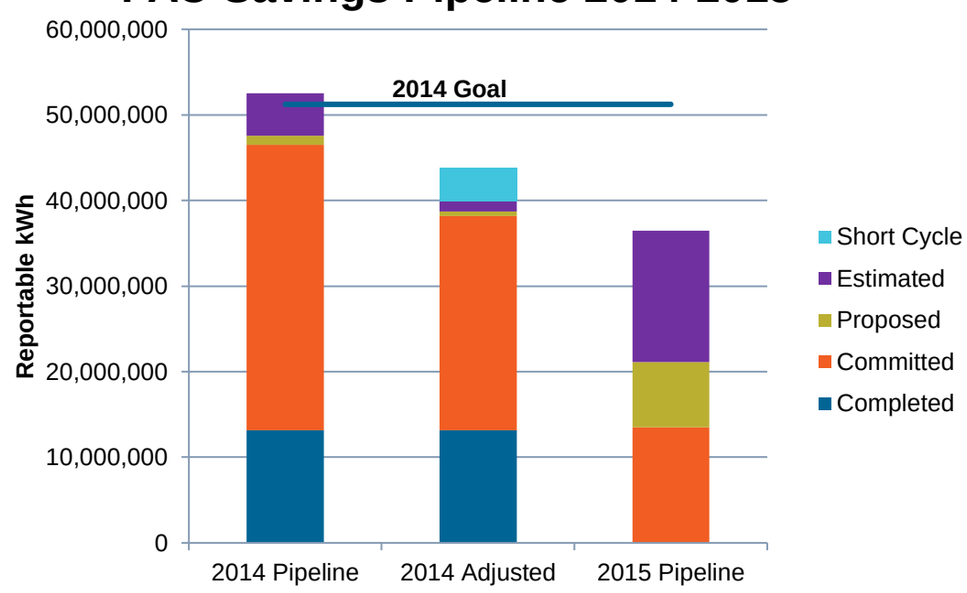
Production Efficiency; not including NEEA

Program: Industrial		PGE	PAC	NWN	CNG
Achievement	2014 Achievement to Date (Rpt kWh or therm)	47,560,396	13,181,940	422,198	12,398
	To date % of goal	47%	26%	37%	28%
Budget Context	Historical % of actual accomplishment	21%	30%	39%	16%
	To Date % of Incentive Budget Spent	34%	33%	25%	37%

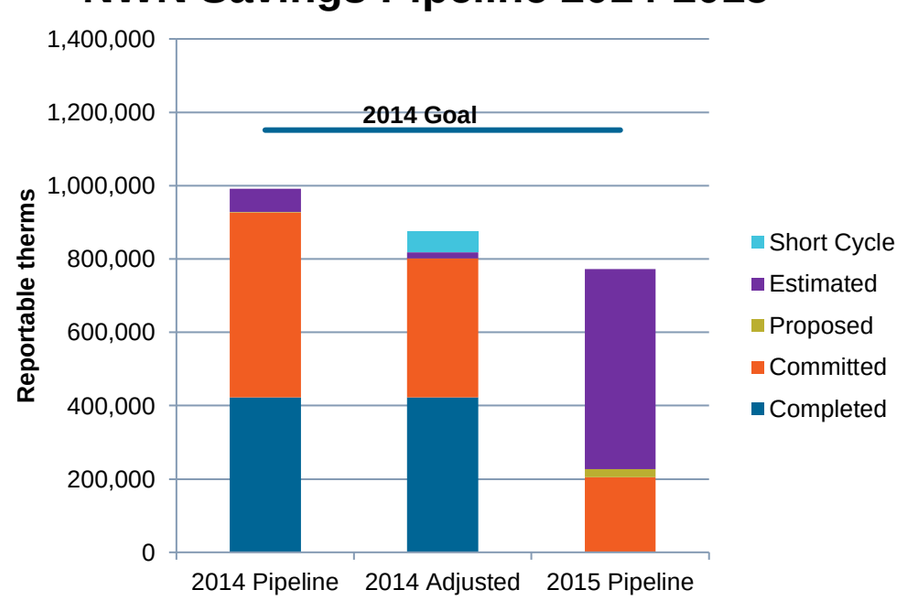
PGE Savings Pipeline 2014-2015



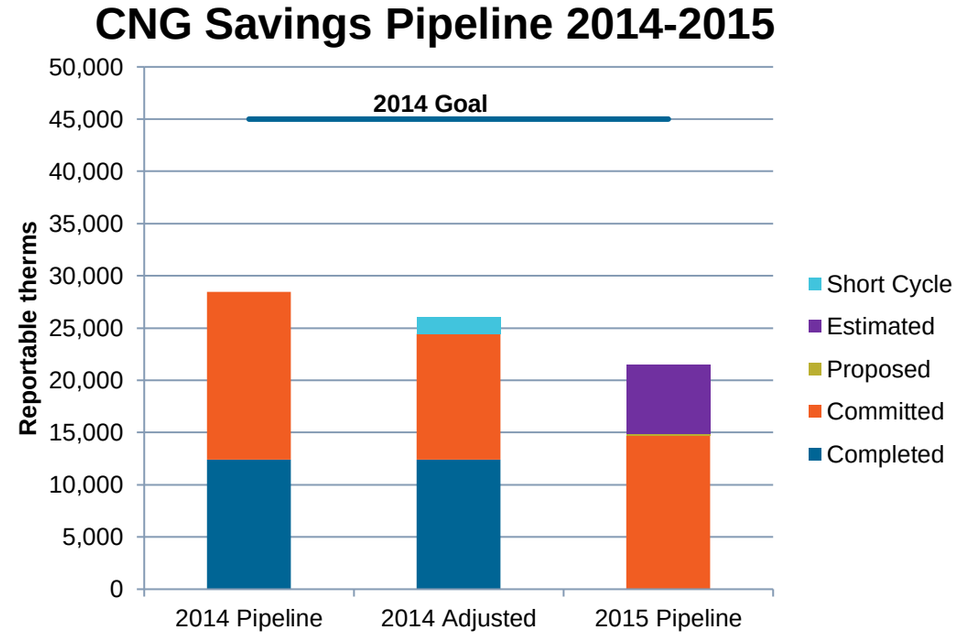
PAC Savings Pipeline 2014-2015



NWN Savings Pipeline 2014-2015



CNG Savings Pipeline 2014-2015



2014 Adjusted Pipeline percent of Goal	
PGE: 93%	**PAC:** 86%
NWN: 76%	**CNG:** 58%

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INDUSTRIAL AND AGRICULTURAL SECTOR

PROGRESS TO GOALS

- Production Efficiency's adjusted pipeline for the electric utility territories shows the program reaching 91 percent of electric goal. Last year at this point, the sector was at 89 percent of electric goal (stretch).
- For gas, the dashboard shows the program reaching 75 percent of the 2014 gas goal. Last year at this point, the program was at 90 percent of gas goal (stretch).
- Generally, the program experiences a drop in projected savings between Q2 and Q3. This is due to projects pushing into the following year. This year is no exception, as projected electric and gas savings dropped 8 and 33 percentage points, respectively, between Q2 and Q3. This is particularly impactful on the gas side, where the shifting of one or two large projects can have a noticeable impact on savings acquisition.
- To improve outcomes over the final quarter of 2014, the program will focus on improving 2014 completion rates of projects in the pipeline by implementing a 20 percent incentive bonus for custom gas and electric projects that complete and turn in all required documentation before the end of the year.
- For NW Natural territory, one reason for the drop in projected 2014 gas savings is that customers delayed or abandoned several medium-sized projects in Q3. The cumulative impact of customers' delaying or abandoning projects is outsized because of the relatively small number of total gas projects. Further, almost all of the new projects identified in Q3 were for 2015.
- The other reason for the drop in forecasted savings in NW Natural territory is the nature of the NW Natural public purpose portfolio. The total amount of savings from public purpose gas projects alternates each year. Last year, 2013, was a record year for gas savings from public purpose projects. Many sizeable greenhouse measures were identified and completed in the fall of 2013. We are not seeing these same measures materialize in Q3 2014.
- To address the 2014 savings shortfall in NW Natural territory, the program implemented a first ever year-end bonus for NW Natural customers. The bonus is designed to influence a higher close-rate of custom projects. This goal of the bonus is to stimulate a 10 to 15 percentage point increase in 2014 gas savings.

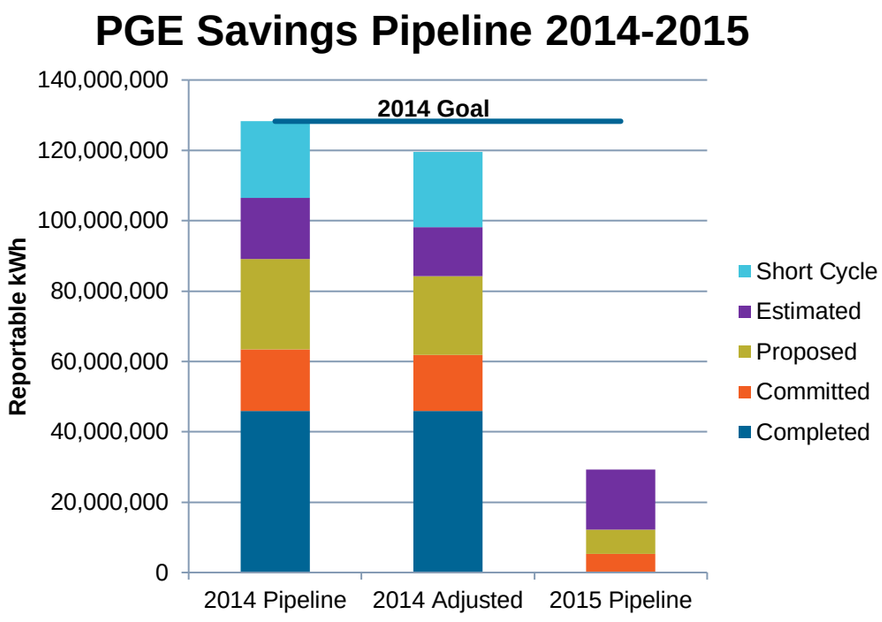
SOURCES OF SAVINGS, TRENDS

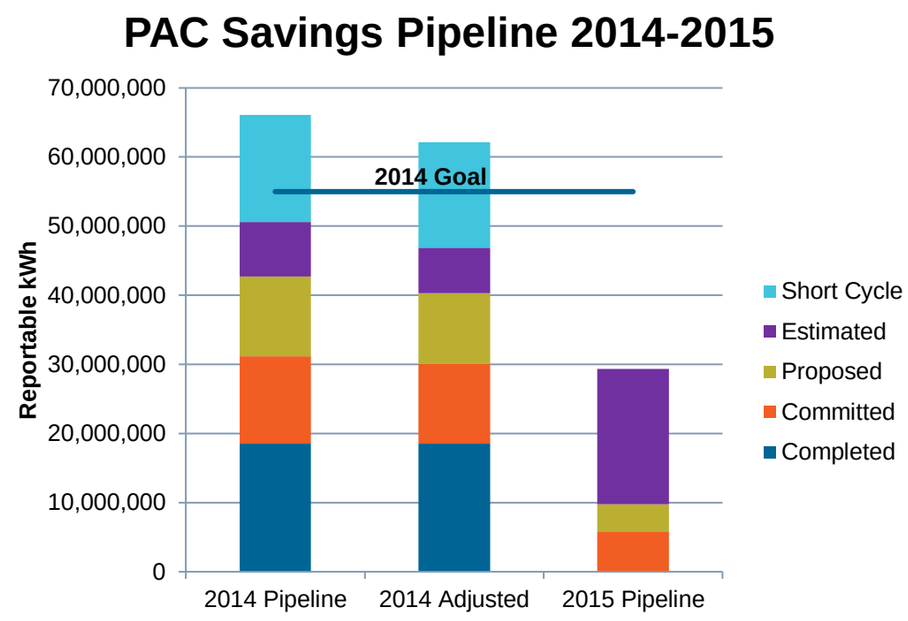
- Lighting comprised the majority of electric energy savings in Q3, with 46 percent of total savings. Custom projects provided 37 percent of savings and streamlined projects made up the remainder. SEM savings will all post in Q4. Gas savings in Q3 were evenly split between custom and streamlined projects.
- No projects closed in Cascade Natural Gas territory in Q3. One project is in the current pipeline, expected to close in Q4.
- The number of customers enrolled in Strategic Energy Management continues to rise. In Q3 the program enrolled more than 40 companies in SEM offerings. The program is on track for more than 50 companies to participate in SEM offerings in 2015. This would be the highest number of customers participating in SEM offerings in a single year to date.
- Production Efficiency recruited for and launched a Central Oregon SEM cohort with five participating companies and a Southern Oregon SEM cohort with 12 participating sites. These are the first SEM cohorts offered in these parts of the state.
- The program launched its first large-scale SEM Maintenance engagement using a third party Energy Management Information System, EMIS, which is used for monitoring, tracking and reporting. This marks a new point in the evolution of SEM at Energy Trust.

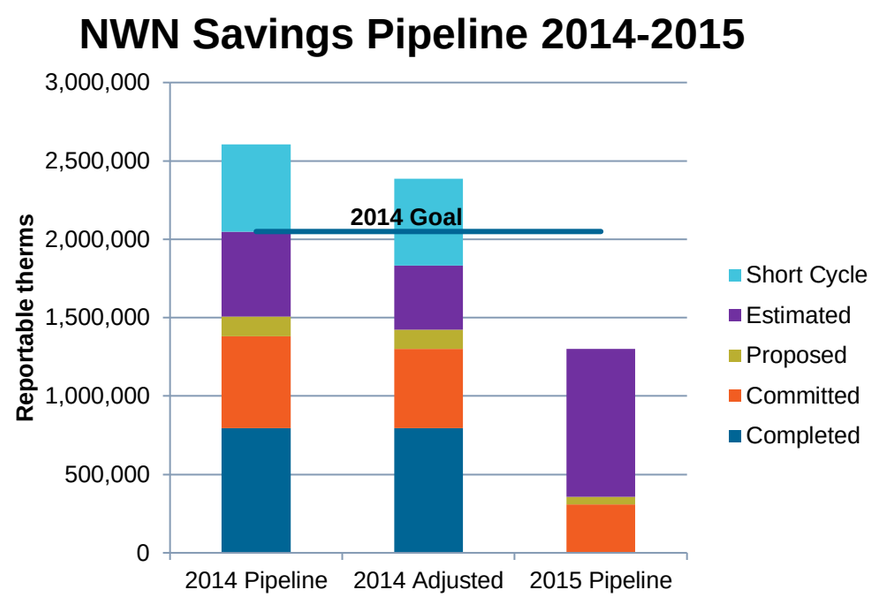
Commercial Programs Summary* **October 1, 2014**

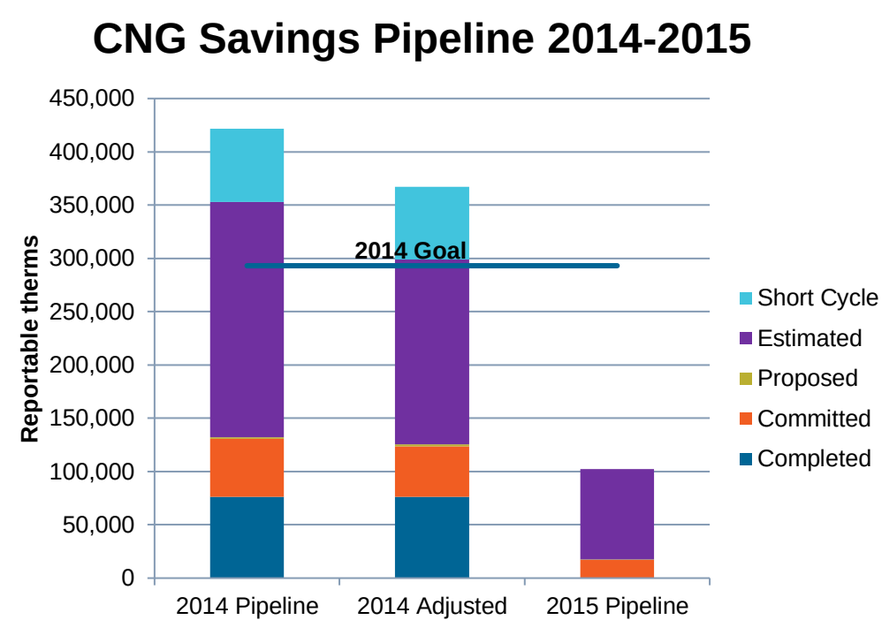
New Buildings, Existing Buildings and Existing Multifamily; not including NEEA

Commercial Sector		PGE	PAC	NWN	CNG
Achievement	2014 Achievement to Date (Rpt kWh or therm)	45,914,262	18,549,161	796,658	76,395
	To date % of goal	36%	34%	39%	26%
Context	Historical % of actual accomplishment	40%	50%	34%	31%
Budget	To Date % of Incentive Budget Spent	31%	30%	29%	27%









2014 Adjusted Pipeline percent of Goal	
PGE: 93%	**PAC:** 113%
NWN: 116%	**CNG:** 125%

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COMMERCIAL SECTOR

PROGRESS TO GOALS

- Gas accomplishments for the commercial sector are on track compared to historical accomplishments, with New Buildings and Multifamily greatly exceeding historical gas accomplishments for this point in the year.
- Existing Buildings is lagging historical gas accomplishments due to underperformance in custom and standard tracks and a large amount of Strategic Energy Management savings that will not be realized until later in the year.
- Electric accomplishments for the sector are slightly lower than expected for this time of year, with all programs running behind compared to historical accomplishments. However, programs made up for some of the shortfall earlier in the year through accelerated outreach and bonuses.
- Existing Buildings lighting track is presently performing beyond expectations, having achieved 21 million kilowatt hours compared to an expected 17.5 million kWh.
- Incentive spending for all utilities is running lower than budgeted for the savings accomplishments.
- To ramp up performance and push toward savings goals in all four utility territories, the Multifamily program continues to promote bonus offerings for select foodservice and HVAC equipment as well as a limited-time bonus offer for custom projects completed through the end of 2014. Multifamily is also taking steps to begin direct installations of LEDs on November 1 to achieve a higher level of energy savings per fixture compared to CFLs.
- New Buildings implemented enrollment bonuses for multifamily projects to ensure program participation in this market sector.
- To drive Existing Buildings participation and bring savings, the program increased the custom incentive offering in August to $0.25/kWh and $2.00/therm with a bonus for qualified projects that complete by year-end, to be capped at 60 percent of project cost.
- The Existing Buildings program continued to promote bonuses for prescriptive measures to increase uptake with an emphasis on smaller customers. These bonuses include cooler doors, insulation, steam traps in schools, boilers, packaged terminal heat pumps and foodservice equipment.

SOURCES OF SAVINGS, TRENDS

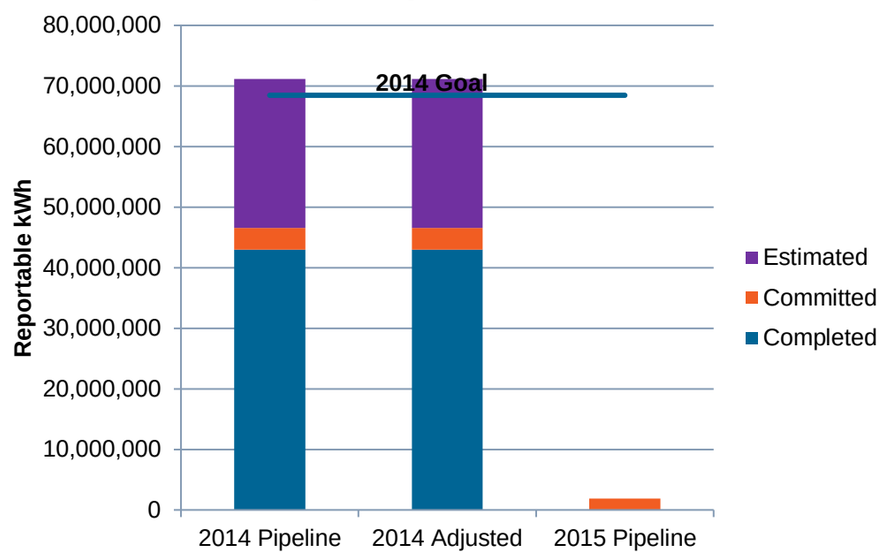
- Existing Buildings accomplishments are lagging for both electric and gas, but the program is expected to exceed three of the four utility goals and to achieve 93 percent of the PGE goal by the end of the year.
- SEM savings are lagging due to the timing of projects, but are expected to significantly exceed goals by the end of the year.
- New Buildings strong performance in Q1 and Q2 bolstered enrollments, bringing 429 enrollments year to date through September—compared to a total of 422 enrollments in all of 2013. New Buildings saw 108 enrollments in Q3, with notable enrollment increases in Cascade Natural Gas and PGE territories.
- In Q3, New Buildings saw a majority of electric savings come from multifamily and retail projects, accounting for 9 percent of the program's electric goal. The main drivers of gas savings were multifamily and restaurant projects, which accounted for 12 percent of the program's gas goal. One large warehouse project was responsible for 2 percent of the gas goal.
- New Buildings saw a strong showing in market solutions projects, where seven restaurants and eight multifamily buildings brought in 37.5 thousand therms and about one million kWh.
- Multifamily is slightly behind historical accomplishments in both electric service territories. However, the program is trending well above historical savings in both gas territories, with NW Natural savings goals already achieved for the year.
- Installation of instant savings measures (including energy-efficient lighting, faucet aerators and showerheads) contributed 63 percent of Multifamily electric savings, with common-area lighting contributing 13 percent and prescriptive projects contributing more than 12 percent of savings. This mix of savings in expected to continue through the remainder of 2014.
- The two primary sources of Multifamily gas savings through Q3 were direct installation of instant savings measures which contributed 84 percent of savings, and prescriptive projects, which contributed 15 percent of savings. This mix of savings is expected to change as more prescriptive and custom capital projects are expected to close in Q4.

Residential Programs Summary* **October 1, 2014**

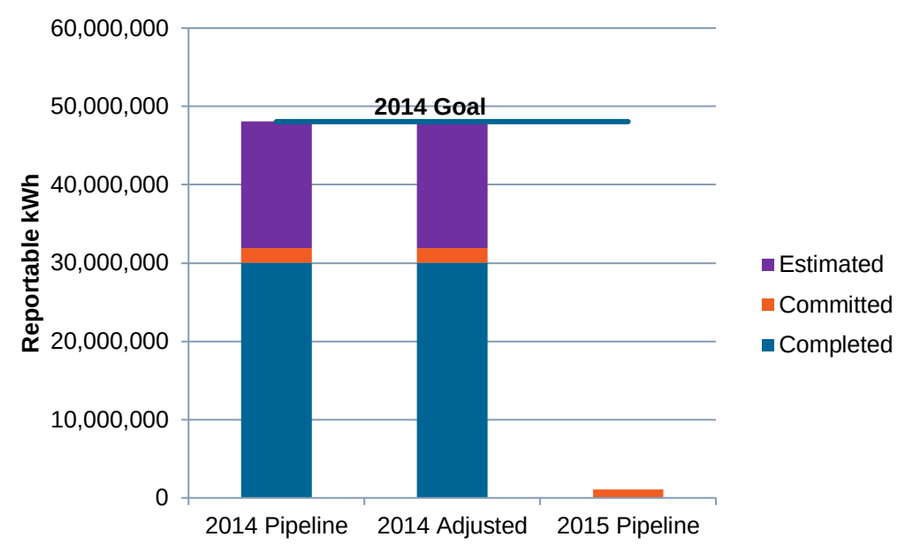
Existing Homes, and New Homes and Products; not including NEEA

Residential Sector		PGE	PAC	NWN	CNG
Achievement	2014 Achievement to Date (Rpt kWh or therm)	42,996,134	30,022,450	1,198,518	99,903
Achievement	To date % of goal	63%	62%	56%	75%
Context	Historical % of actual accomplishment	52%	54%	51%	52%
Budget	To Date % of Incentive Budget Spent	60%	59%	49%	52%

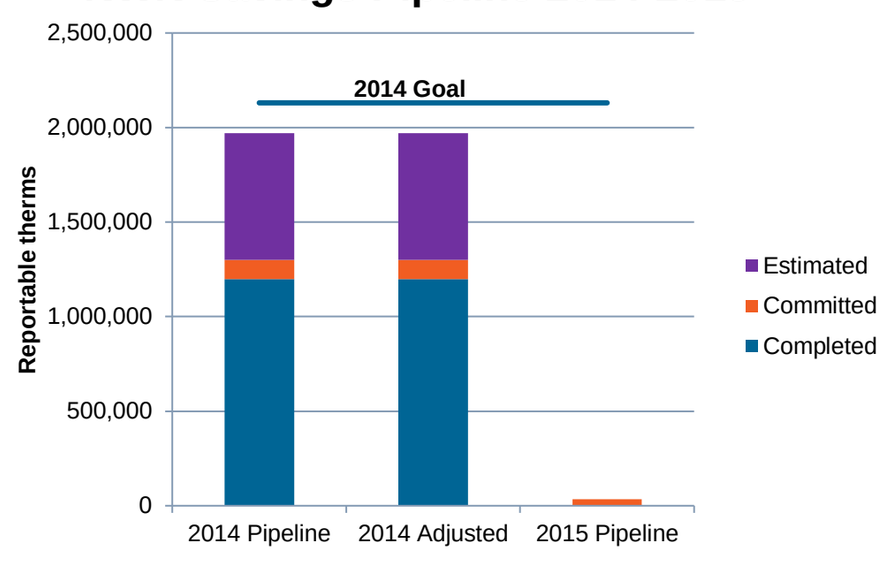
PGE Savings Pipeline 2014-2015



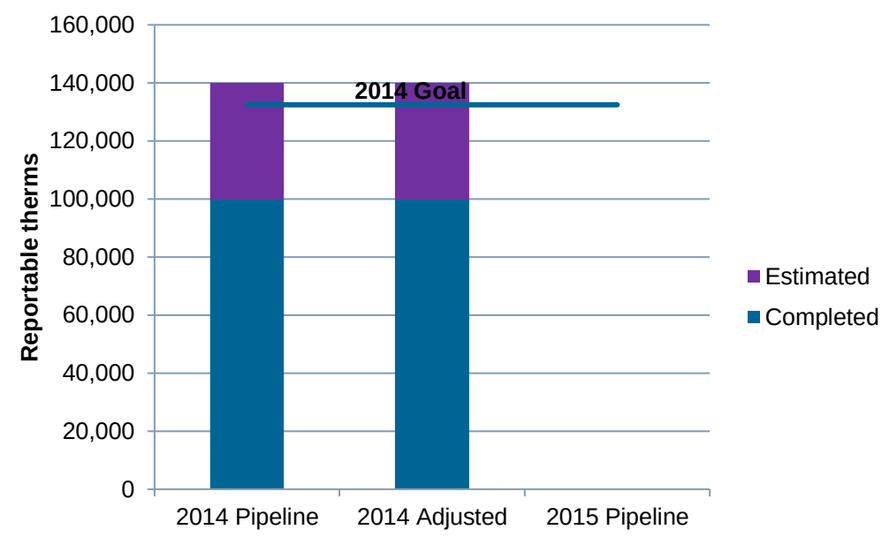
PAC Savings Pipeline 2014-2015



NWN Savings Pipeline 2014-2015



CNG Savings Pipeline 2014-2015



2014 Adjusted Pipeline percent of Goal	
PGE: 104%	**PAC:** 100%
NWN: 92%	**CNG:** 106%

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RESIDENTIAL SECTOR

PROGRESS TO GOALS

- The residential sector is on track to meet or exceed goals in all utility territories except NW Natural, which is behind expectations due to lower-than-anticipated persistence savings from Opower and fewer-than-expected Clean Energy Works projects completed.
- Opower persistence savings are 99,326 therms and 1.1 M kilowatt hours under projected savings, which represent 4.2 percent of the Existing Homes electric goal and 8.4 percent of gas goal.
- Bonuses for gas hearths and windows are targeted at bolstering NW Natural savings.
- Clean Energy Works is providing a NEST thermostat for projects that close by year-end to encourage project completions in 2014.
- New Homes and Product saw more electrically-heated homes built than anticipated, and the program is exploring opportunities to bring additional NW Natural gas savings to make up for a 4 percent shortfall in NW Natural savings goal. Strong new home sales in Bend helped the New Homes and Products program exceed its Cascade Natural Gas goal by 9 percent.
- In the New Homes and Products program, retail general purpose CFLs accounted for approximately 38 percent electric savings during Q3, followed by LED lamps at 19 percent, retail specialty CFL lighting at 17 percent and fridge recycling at 8 percent.
- In all utility territories, Existing Homes program savings in Q3 are ahead of Q3 2013 levels.
- In the Existing Homes program, the majority of electric and gas savings in Q3 are the result of instant savings measures (including energy-efficient light bulbs, faucet aerators and shower heads) following a successful, targeted campaign to promote Energy Saver Kits. Instant savings measures comprised 62 percent of electric savings and 60 percent of gas savings in Q3.
- In the New Home and Products program, market transformation accounted for approximately 47 percent of gas savings during Q3, followed by EPS™ gas homes and retail showerheads at 22 percent each.

SOURCES OF SAVINGS, TRENDS

- In Existing Homes, core measures are trending below 2013 levels for both gas and electric. The exception is heat pump water heaters, which are performing better than 2013 levels due to the inclusion of a tier 1 incentive in 2014.
- The Home Performance track saw significantly fewer savings than prior years and is 40 percent below expectations for 2014. This drives much of the fall-off in core measures.
- The program expects that work with trade allies, distributors and bonuses initiated in Q2 will increase savings in Q4.
- For both fuels, instant savings measures played a larger role in gaining savings than the sector had hoped.
- As requested, staff submitted Residential Energy Tax Credit recommendations to support Oregon Department of Energy rulemaking and will continue to participate until new Residential Energy Tax Credits are finalized for January 1, 2015.
- House Bill 2801 went into effect as a state mandate on July 1, 2014. The program has been working with stakeholders such as contractors and guilds to determine the best method to implement and enforce this mandate.
- Existing Homes began development of an administrative interface that allows quicker data entry for incentive application processing and enhanced digital document retention.
- The highest-volume new home builder, DR Horton, is moving to 100 percent EPS compliance in all of its subdivisions, effective immediately, and is planning to use EPS as a marketing tool to gain a competitive advantage.
- From September to December, The Home Depot is providing premium in-store placement for energy-efficient lighting products, including Cree LEDs, Philips LEDs, TCP CFLs and a variety of other manufacturers.
- New Homes and Products launched point-of-sale incentives with five Sears locations, and preliminary results exceeded expectations. Rather than the anticipated 50 percent lift, there was a 67 percent lift in August over redemptions during the same time period last year.