EnergyTrust of Oregon, Inc.

Staff Report

May 14, 2008

This report from Margie Harris is on behalf of all staff and spans the period March 24, 2008, through April 24, 2008. Items not otherwise addressed in this board packet are described here.

General

- Staff presented the draft revised budget to the OPUC, seeking their input on March 25th.
- Continued development of materials for the board strategic planning work session on June 13-14 at Reed College.
- Margie spoke at the April 16 Sustainability and Technology conference at the Oregon Convention Center, providing background on the Energy Trust and highlighting opportunities for high tech firms to participate in our programs.
- Energy Trust participated as a sponsor and judge of the BEST awards, a well-established program initiated by the City of Portland Office of Sustainable Development, to recognize sustainable business practices.
- Margie held coordination meetings with PGE, NW Natural and Cascade Natural Gas.

Program Planning and Evaluation

General

- Developed analysis and options for energy efficiency and renewables in support of Energy Trust strategic planning process and June board retreat.
- Working with NW Natural, developed forecasts of available conservation and planned achievements for a twenty-year period as part of their April 15 integrated resource plan (IRP) filing. Now working on similar tasks for Cascade Natural Gas in Washington.
- Met with NW Natural to update and strengthen the process for planning and programs. NW Natural will make more of Stephen Bicker's time available to work with Energy Trust on these issues. Bill Edmonds will continue to play executive liaison role.
- Participated in brainstorming/feedback session regarding energy items for update of joint City of Portland/Multnomah County Energy Plan. Much of the discussion focused on what is needed to reduce carbon 80% by 2050, and what near-term actions put us on that path. A session in May will refine recommendations.
- Through Conservation and Renewables Advisory Committees, facilitated further participation in NEEA strategic plan by Energy Trust stakeholders.
- Participated in first meeting of Governor's Energy Efficiency Working Group, convened to develop policy options for the 2009 legislative session.

Residential

Cost-effectiveness analyses were completed for:

- New ENERGY STAR refrigerators. The measure passed and a rebate will become available.
- A large multifamily project with unusual configuration of dwellings.

- Pete Catching participated in a new NEEA expert committee meeting to establish updated method for claiming market transformation savings from the residential compact fluorescent

market. Rapid success in the national market is making it more difficult to estimate the "baseline"- what would have happened without NEEA, Energy Trust, and utility programs in the Northwest. Regional consensus was achieved on the key elements of the method.

Commercial and Industrial

- Working with Production Efficiency Program personnel, refined criteria for incorporating non-energy benefits into benefit/cost analysis of process efficiency measures.

NW Alliance Evaluations

Market progress evaluation reports were completed for the following programs in the last 3 months and are available on the NW Alliance website (www.nwalliance.org):

- No reports completed during this time period.

Efficiency Programs

Home Energy Solutions—ENERGY STAR® New Homes

- Established an Oregon training partner group to populate an online trade ally training calendar.
- Participated in the Portland Home Builder's Association's Ultimate Open House show with over 20 efficient homes on display.
- Exhibited at the Oregon Manufactured Homes show in Salem.

Home Energy Solutions—ENERGY STAR® Products

- Began effort to allow online application of clothes washer and refrigerator incentive forms.
- Continued to process large numbers of clothes washer incentives. Refrigerator incentives steadily increasing.

Home Energy Solutions—Existing Homes

- Processed 57 Marathon electric water heaters and 104 tankless water heaters March 2008.
- The Corvallis Community challenge launched March 3, 2008, with 157 Home Energy Reviews scheduled and 84 completed in March.
- Six new technicians completed Building Performance Institute (BPI) Certification for Home Performance with ENERGY STAR® bringing the total number of BPI Certified Home Performance technicians to 34.
- Two home energy advisors were trained to assess a home's solar potential and recommend solar strategies for qualified homeowners.
- Conservation Services Group staff began processing their first solar water heating incentive applications.

Business Energy Solutions—New Buildings

- Currently renewing and building the program's trade ally network intended to increase penetration in the "design-build" market by working with the contractors.

Business Energy Solutions—Existing Buildings

- First quarter activity has been higher than any year to date.
- Developed new initiatives with targeted incentives and marketing for data centers, auto services, congregations and groceries, to be launched throughout the year.
- Program continues to expand activity in foodservice and lodging.

Business Energy Solutions—Production Efficiency

- Continued to support Association of Clean Water Agencies (ACWA's) energy independence study for wastewater treatment facilities, assisting with preliminary audits for the two pilot sites in the cities of Gresham and Corvallis.
- With the Northwest Energy Efficiency Alliance (NEEA), supported two Compressed Air Challenge mentored training sessions in Medford and Roseburg.
- Contributed to regional planning efforts to encourage high quality motor rewinds by providing standard incentives to motor service shops through Green Motors Practices Group, a nonprofit organization.

NW Energy Efficiency Alliance—Residential Efficiency Programs

- In concert with Energy Trust, developed a regional training platform for all trades working on ENERGY STAR Homes. These trainings are designed to recruit and educate new builders, and realtors about the value of ENERGY STAR homes.
- Committed $50,000 to be used for marketing Northwest ENERGY STAR Homes within Energy Trust service territory.
- Worked with Energy Trust, Earth Advantage and the Oregon Department of Energy to finalize the 2009 Northwest ENERGY STAR Homes requirement in response to the Oregon code change in April 2008.

Commercial efficiency programs

- Legacy Health System is moving forward with implementation of their Strategic Resource Management Plan (SRMP). Work has begun on system wide energy management purchasing standards and incorporating life-cycle costing into financial evaluation practices.
- BetterBricks worked with Oregon Health Sciences University (OHSU) on the business case for energy management presented to OHSU senior executives.
- For the second year, Energy Trust and BetterBricks are sponsoring a contest with Building Owners and Managers Association (BOMA) to recognize the most energy efficient office buildings in Portland, with 26 buildings signed up for the contest. Related energy management education and training activities with BOMA and Energy Trust are underway.

Industrial efficiency programs

- Sabroso Medford designated energy teams for each of their energy systems, including lighting, cold storage, pumps and motors, compressed air, water, and boilers. An Energy Trust representative worked closely with the lighting team to provide plant tours of firms implementing best practices in the area.
- At Blue Heron, Energy Trust coordinated a re-engagement overview of services available through Energy Trust, PGE and NEEA.

Codes and Standards

- Oregon's new residential energy code was approved by the state's Residential Structures Board in early 2008, and goes into effect state-wide on July 1st. In March, Oregon Department of Energy (ODOE) staff, funded by NEEA, began providing trainings around the state on the new code.
- ODOE began planning the development of a non-residential code change proposal that would reduce commercial building use by 30% relative to the current code.

Renewable Energy

Open Solicitation

- Completed a study for small municipal hydro project for West Linn.
- Conducted an outreach effort to 48 cities and water districts in the PGE service territory. Offered the opportunity to share the cost of hiring a consultant to write an application to the state's Renewable Energy Feasibility Fund for a hydro feasibility study.
- Initiated hydro feasibility studies with Tualatin Valley Water District and Crystal Springs Water District.

Utility Scale

- The GoodNoe Hills 94 MW wind project for Pacific Power remains on-track for a June 2008, completion.

Wind

- Approved the second small wind project application, a 10kW system to be installed on a farm near Salem, Oregon.
- Continued planning for two upcoming small wind seminars for communities in windy areas.
- Presented at the NW Solar Expo on small wind.
- Met with the Port of Coos Bay to identify potential anemometer locations to support development of a community wind project.

Biopower

- Initiated a feasibility study to consider the co-location of an anaerobic digester at a planned rendering plant near Prineville, Oregon.
- Construction of the 1.7 MW biogas expansion at the City of Portland's Columbia Boulevard wastewater treatment facility is completed and testing and commissioning has begun.
- Worked with two prospective, small biomass projects to help initiate the application process for project funding.
- Completed the initial analysis for a proposed biomass combined heat and power (CHP) project in Lakeview, determining there was an above-market cost at certain assumed rates and supply conditions. The applicant needs to successfully complete negotiations on power rates and finish the biomass supply study before a final review can be completed.

Solar

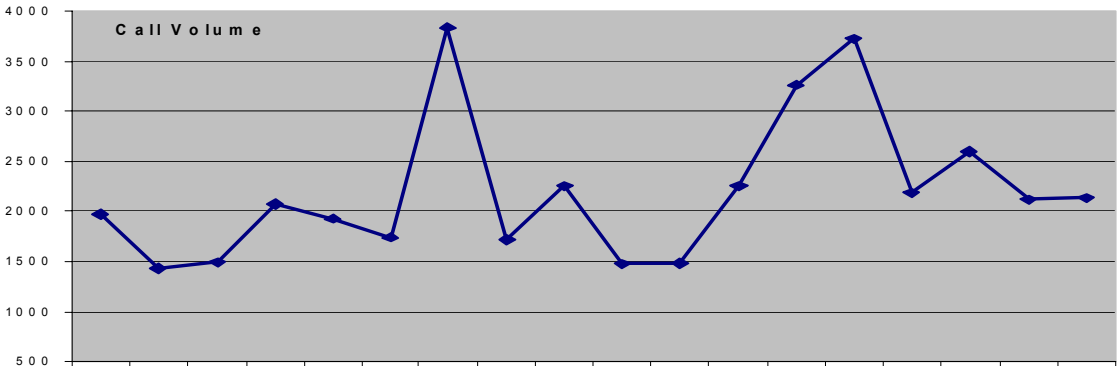
- Sponsored and conducted training sessions at the 3rd annual NW Solar Expo, which consisted of 3 sold-out days of professional solar training for contractors and a 2-day consumer expo that attracted more than 4,000 people.
- Presented the Energy Trust Green Future Award to the City of Portland's Office of Sustainable Development (OSD) in recognition of its success increasing the number of solar installations in Portland. The city has trained its inspectors, streamlined its building permit process for solar installations, and successfully collaborated on the *Solar Now!* awareness campaign.
- Produced and distributed an educational *Solar Now!* brochure, website (solarnoworegon.org) and phone number used by all members of the *Solar Now!* campaign to promote a single statewide solar brand and improve consumer service.

Communication, Marketing and Outreach

Center/Customer Service

- Finalized contract with Active Telesource to provide call center services.
- Added toll-free number for *Solar Now!* and provided corresponding training at call center.
- Staffed a table at Douglas County Earth Day & Energy Fair.
- Trained new staff on Energy Trust programs and background.

Call Volume through March 2008

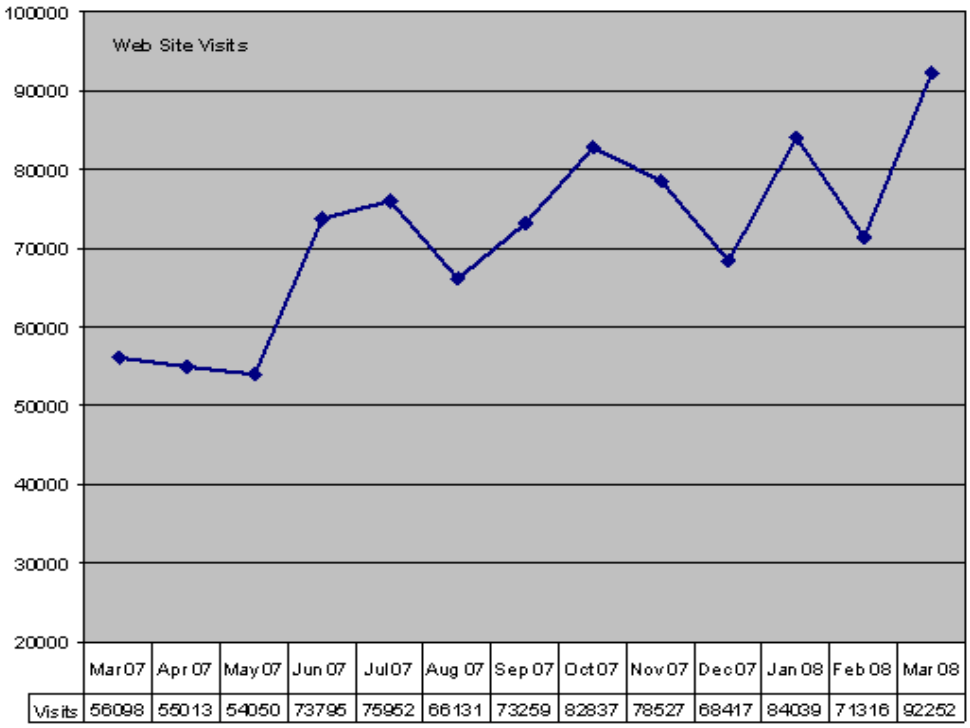


	Oct 06	Nov 06	Dec 06	Jan 07	Feb 07	Mar 07	Apr 07	May 07	Jun 07	Jul 07	Aug 07	Sep 07	Oct 07	Nov 07	Dec 07	Jan 08	Feb 08	Mar 08
Calls	1979	1434	1489	2077	1931	1745	3839	1718	2259	1476	1485	2260	3267	3729	2189	2597	2118	2136

Website

- Developed new website for *Solar Now!* marketing campaign, a collaboration between Energy Trust, Oregon Department of Energy, City of Portland Office of Sustainable Development and Solar Oregon.
- Implemented customized trade ally search list for Production Efficiency, Existing Buildings, New Buildings, and Home Energy Solutions programs.
- Created new Trade Ally Training Calendar, listing trainings offered by Energy Trust, Oregon Department of Energy, Home Builders Association and NW Natural.
- Provided web graphics to Apogee, our new provider of the on-line new Home Energy Analyzer tool.
- Worked with renewables team to restructure (by technology) and rewrite pages in the Renewable Energy section of the website to improve clarity and navigation.

Website Visits through March 2008



Trade Ally Initiative

- Completed renewal process for New Buildings trade allies.
- Conducted Home Energy Savings trade ally training sessions.
- Worked with evaluations staff to prepare annual trade ally survey.
- Changed Insider newsletter schedule to correspond with a two-month period.

Community Energy

- Scheduled 250 Home Energy Reviews out of 412 total referrals received to date.
- Arranged co-promotion with Your Green Home to encourage Home Energy Review signups and coordinated with Bonneville Power Administration to contribute if a Consumers Power customer wins a drawing.
- Designed and placed an advertisement promoting signups in Earth Day special section of Gazette Times.
- Creating Energy Saver kit for homes built since 1992.
- Supported and promoted Solar Oregon's Basics of Going Solar workshop.
- Staffed Earth Day events Saturday, April 19, and Tuesday, April 22.
- Corvallis consultant team scheduled/completed 13 commercial energy walkthrough assessments.
- Hosted commercial trade ally breakfast April 22; 26 out of 39 invitees attended.

Events, Speaking Engagements and Sponsorships

- Better Living Show title sponsor, attracting over 22,000 attendees.
- Staffed Portland's City Repair Earth Day Fair.

- Launched the *Solar Now!* campaign at the NW Solar Expo in coordination with Office of Sustainable Development, Oregon Department of Energy and Solar Oregon.
- Provided Solar Trade Ally trainings and customer classes at the NW Solar Expo.

Creative Products

- Created 15 new and resized advertisements: 4 commercial, 7 residential, 4 renewables.
- Produced updated fact sheets for the Restaurant/Foodservice Initiative and Lodging Initiative to reflect new incentive.
- Developed new commercial solar fact sheet for use at NW Solar Expo. This will be transitioned to a *Solar Now!* piece.
- Created advertisements to announce Small Wind Workshops in Salem and Pendleton.
- Produced and released 2 newsletters: Synergy (general, monthly) and Pit Stop (internal, monthly).
- Created a poster representing the Refrigerator Replacement initiative for Home Energy Solutions program to display at the Affordable Comfort conference in April.
- Created a Solar Energy Review worksheet for use in the Solar program.
- Created a *Solar Now!* brochure, website template and ad template.
- Produced a Home Energy Review fact sheet.
- Created a Home Energy Solutions incentive information sheet.

News Releases and Media Events

- Distributed press release to state agricultural media and local media for Small Wind Workshops.
- Distributed press release to statewide business media on the New Building program re-bid announcement.
- Collaborated with PGE on a co-branded press release on heat pumps.
- Continued to build a pipeline of stories and press releases for 2008.
- Continued to garner news coverage about and mentions of Energy Trust programs in local newspapers around the state, including The Oregonian, Portland Business Journal, Lake Oswego Review and Renewable Energy World.
- Wrote and submitted one "Energy Corner" article for the Main Ingredient, the Oregon Restaurant Association's monthly magazine.

Utility Co-promotions

- *Cascade Natural Gas*: Sent out a bill insert focusing on free Home Energy Reviews in April. Created a May bill insert on ENERGY STAR gas-saving appliances. Provided a May Community Matters (formally known as Warm Neighbor News) newsletter story on "Smart Ways to Trim Energy Costs."
- *NW Natural*: Collaborated on upcoming June insert. Finalized plan with NW Natural for direct mail letters to restaurant, lodging and auto services customers, to be distributed through May.
- *Pacific Power*: Provided May bill insert on heat pumps. Provided newsletter articles to Pacific Power for their two commercial customer newsletters.
- *Portland General Electric:* Collaborated with PGE on bill insert, press release and direct mail for the Spring Heat Pump Campaign.

Operations, Contracts, Human Resources, Finance and Information Technology

Finance and Accounting

- *Treasury*:
  - Renewed Energy Trust $4 million line of credit with Bank of the Cascades
  - Reviewed bank financial status and security of Energy Trust investments

- *Financial Reporting:*
  - Contributed financial information and editing for the 2007 annual report
  - Provided auditors with preliminary information necessary to complete 990 tax return for 2007.
  - Completed the 2008/09 budget and action plan update.
  - Completed the forecast of incentive commitments.
  - Completed February and March financial statements and the first quarterly report.
- *Process improvements:*
  - Began implementation of an automated tool to speed-up journal entry process.
  - Analyzed and improved process for managing stale dated checks.
  - Researched and proposed a web-based time-keeping software program.
  - Engaged an outside consultant to guide process improvements for contract accounting.
  - Reviewed potential replacement for current contract accounting software as part of larger accounting software project.
  - Discussed ideas to improve incentive processing error rate through enhanced training of PMC's.
  - Participated in cross-functional events; commercial all-hands meeting, LEED for homes webcast, and the Better Living Show.
  - Attended webcast seminars; methods and uses for business forecasts, trends in integrating finance and operational planning systems.
- *Incentive payment production:*
  - Imported and processed 500-800 incentive checks weekly.
  - Investigated and resolved a number of errors prior to issuing payments.
- *Compliance:*
  - Developed criteria for external evaluation of internal controls.
  - Began Q1 FastTrack audit.
  - Continued staff interviews regarding compliance with identify theft prevention policies.
  - Worked with 401k provider to merge records following acquisition of Invesmart by The Standard.
  - Submitted the 2007 1099 file to the IRS.
  - Completed clean-up and archiving of 2007 project document retention.

Human Resources and Office Management

- Coordinated development and receipt of revised salary schedules and benefit evaluations.
- Reviewed brokers' proposal for potential future office space alternatives, met with various groups regarding alternatives; worked with past broker on leasing additional storage and conference room space in current building.

- Accepted the resignation of Michel Gregory as Senior Communications & Marketing Manager; Michel returned to her consulting practice and will continue to provide services to Energy Trust
- Hired Joe Kraus as a summer intern in the legal department. Joe is currently attending University of Oregon School of Laws and will graduate May 2009.
- Hired Thad Roth as Biomass Program Manager in the Renewable Resources department. Thad was most recently with Columbia River PUD as their Marketing & Communications Supervisor.
- Hired Ben Huntington as Planner/Analyst in the Planning & Evaluation Department. Ben was previously with PECI as a Senior Project Coordinator and has worked closely with Energy Trust projects.
- Recruiting for the following positions: Database Administrator, IT Manager, Senior Communications & Marketing Manager, and Planning Engineer
- Provided annual training to staff on 401k investment options including Mainspring option

Legal and Contracts

- Incorporated in other department reports.

Information Technology

General

- Contracted with Debbie Blanchard as interim IT Manager.
- Began recruitment process for new IT Manager; conducted preliminary phone screenings and interviews.
- Circulated draft 2008 IT Strategic Plan to the IT Steering Committee for feedback, anticipating approval at the May 15 meeting.

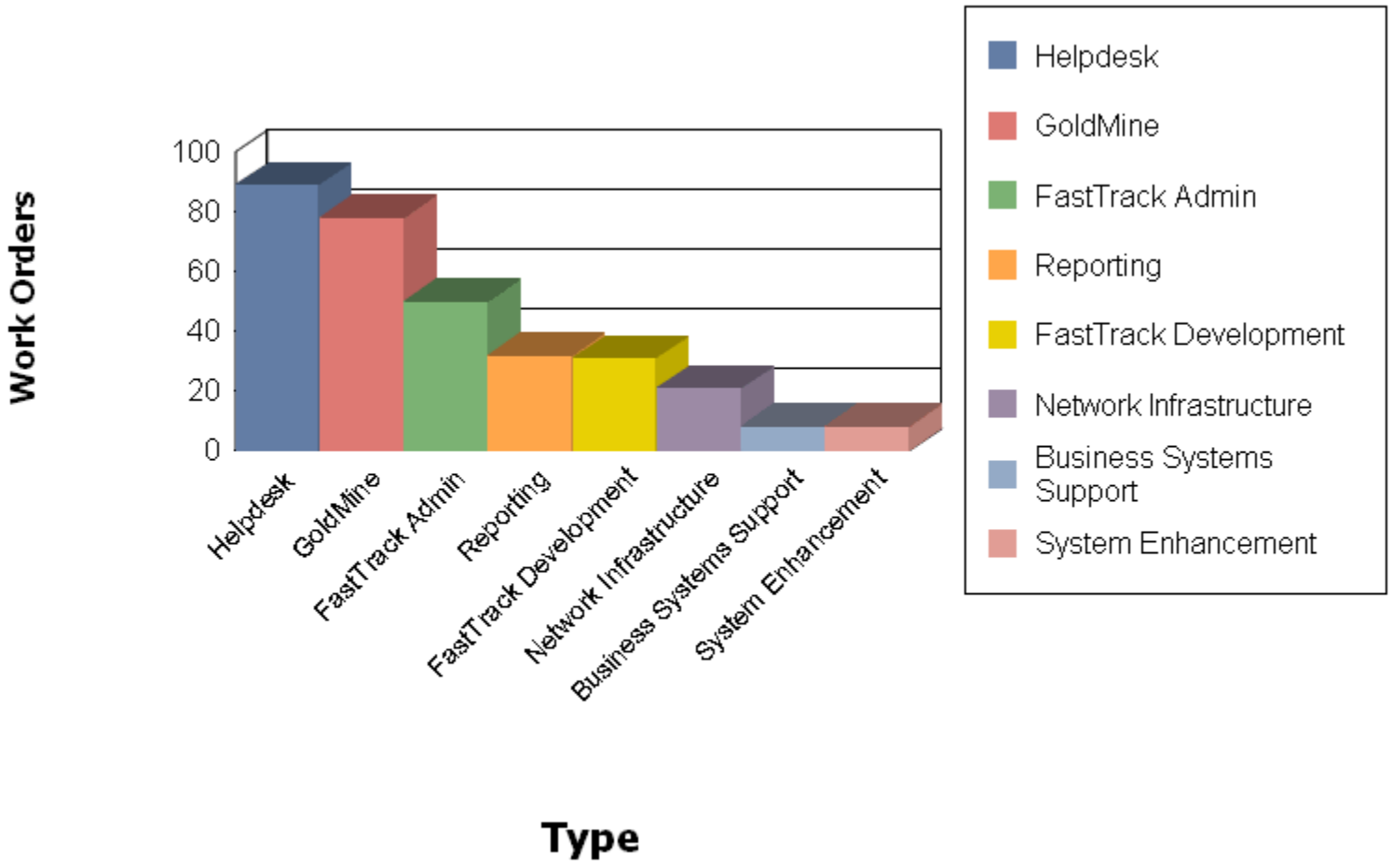
FastTrack Team

- Approved Web Forms Project Charter and held first Web Forms Steering committee meeting to automate forms on-line. Established milestones including the May 19 release of an RFP to develop the Web Forms Architectural Framework and develop the initial incentive form for clothes washers and refrigerators. The flexible framework will allow the easy addition of other forms.
- Upgraded the FastTrack server from Microsoft SQL Server 2000 to SQL Server 2005. The entire IT team contributed to ensure a smooth transition. Updated corresponding development and testing.
- Automated the routine to refresh the FastTrack development database from the current production database.
- FastTrack application improvements include: new attribute filter in the Project, Sites and Measures modules; an email service to transmit daily tasks to users on request; and improved forecast functionality.

Business Systems Team

- Introduced the Web Intelligence tool at the March ITAC meeting and prepared a schedule for gathering data requirements and user training.
- Imported nearly 3000 participants into GoldMine, significantly reducing manual data entry and increasing data accuracy.

Infrastructure Team

- Balanced load between two terminal servers.
- Installed test Goldmine server.

- Successfully deployed a new version of the secured access for remote log into the ETO systems, enabling better troubleshooting of connection issues.
- Processed 314 service tickets using the new Track-it Help Desk software.