# Information Sharing Issues

Conservation Advisory Council
October 22, 2008

EnergyTrust
of Oregon, Inc.

# Overview

- Proposal: amend OPUC administrative rule (OAR 860-038-0540) and Energy Trust policy on sharing consumer/participant information between utilities and Energy Trust
- Provide background, proposal, next steps
- Seeking feedback and questions

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# Current System

- OPUC administrative rule: Utilities give Energy Trust information on large customers (> 1 aMW) who opt into information transfer, and smaller customers who do not opt out
- Energy Trust policy is not to share information without participant consent except –
  - Commercial or industrial participants' names, incentives, energy benefit may be provided to OPUC, ODOE, legislature
  - May share information with recipients who sign non-disclosure agreement (largely employees and subcontractors)

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# Why Change the Administrative Rule?

- SB 838 (2007 Renewable Energy Act, section 46):
  - Supplemental efficiency funds may not benefit large customers (> 1 aMW)
  - To ensure compliance, need names of large customers
  - Under current rule, utilities cannot provide names without consent

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# Why Change the Administrative Rule?

- Given six years of experience with current system, are there ways to –
  - Improve service to utility customers?
  - Strategically reach customers who are now paying into public purpose fund but receiving no benefit?
  - More effectively evaluate programs?

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# Proposal

- Eliminate opt-in (large customers) and opt-out (smaller customers) processes
- Utilities provide information to Energy Trust
- Energy Trust :
  - Protect it pursuant to Energy Trust policy
  - Provide consumers with ways to opt out of marketing effort (i.e., not receive communications from Energy Trust)
  - May contact other consumers
  - **No telemarketing** to residential consumers

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# Proposal (continued)

- Energy Trust would share *its* information with utilities :
  - as part of coordinated energy efficiency or renewable energy activities
  - limited to the particular utility's customers and product or service (no sharing of one utility customer's energy use with another utility)
- Utilities may use information for routine customer service surveys

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# Benefits and Protections

- The proposal would allow Energy Trust to:
  - gear programs to avoid SB 838 issues for large customers
  - be more responsive to consumers, work with utilities to fine-tune programs and marketing, understand what is working better or worse
- Participant protections:
  - Confidentiality ensured by Energy Trust policydeveloped in an open process
  - Participants who do not want Energy Trust contact may opt out of communication efforts

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# Next steps

- Consider feedback
- Request rulemaking
- OPUC process and Energy Trust policy amendment
- Goal: complete by end of 2008

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