

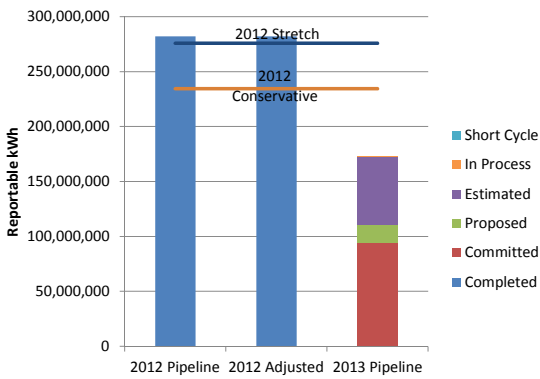
Efficiency Summary with NEEA

January 1, 2013

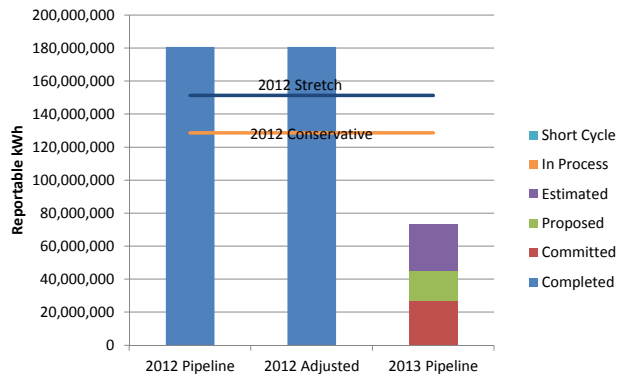
Combined Efficiency		PGE	PAC	NWN	CNG
Achievement	2012 Achievement to Date (Rpt kWh or therm)	282,316,497	180,707,979	5,484,647	431,070
	To date % of Conservative goal	120%	141%	123%	116%
	To date % of stretch goal	102%	119%	105%	99%
Context	Historical % of actual accomplishment	100%	100%	100%	100%
Budget	To Date % of Incentive Budget Spent	86%	90%	94%	80%

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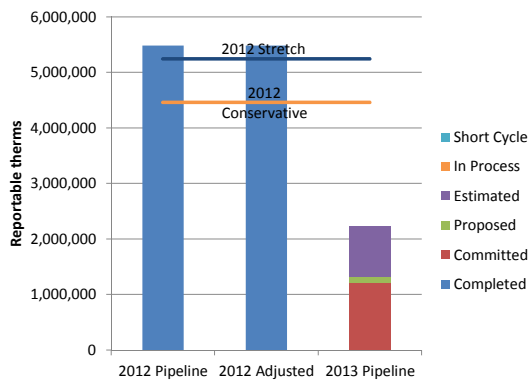
PGE Savings Pipeline 2012-2013



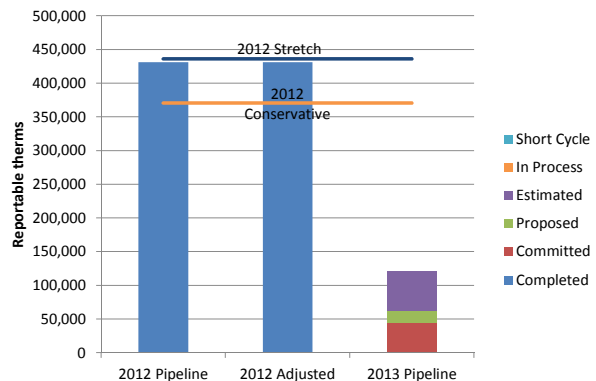
PAC Savings Pipeline 2012-2013



NWN Savings Pipeline 2012-2013



CNG Savings Pipeline 2012-2013



2012 Adjusted Pipeline percent of Stretch Goal	
PGE: 102.32%	PAC: 119.45%
NWN: 104.58%	CNG: 98.90%

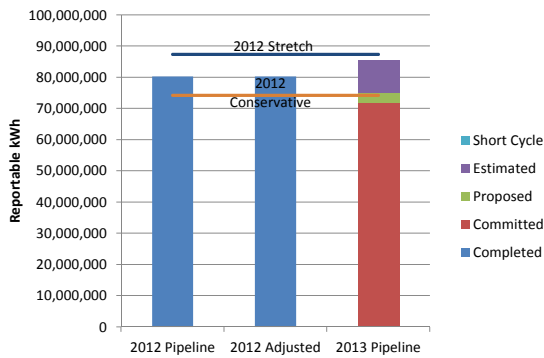
Industrial Summary

January 1, 2013

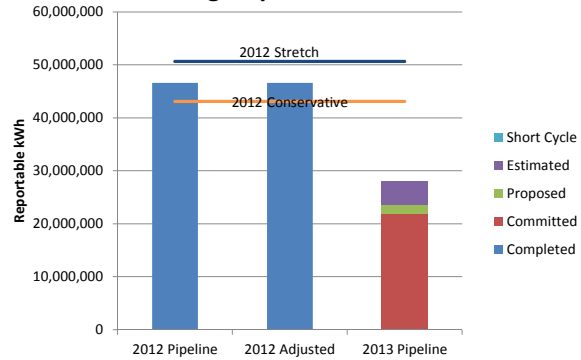
Program: Industrial		PGE	PAC	NWN	CNG
Achievement	2012 Achievement to Date (Rpt kWh or therm)	80,285,188	46,645,982	758,325	121,062
	To date % of Conservative goal	108%	108%	86%	113%
	To date % of stretch goal	92%	92%	74%	96%
Context	Historical % of actual accomplishment	100%	100%	100%	100%
	To Date % of Incentive Budget Spent	89%	69%	47%	105%

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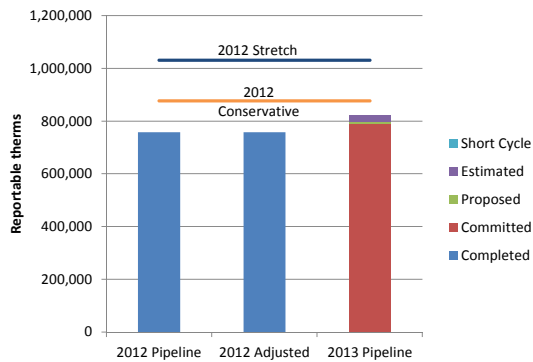
PGE Savings Pipeline 2012-2013



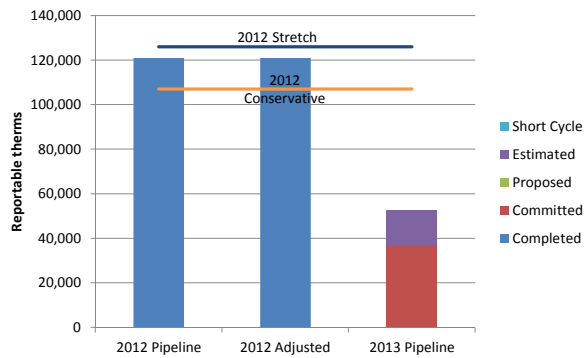
PAC Savings Pipeline 2012-2013



NWN Savings Pipeline 2012-2013



CNG Savings Pipeline 2012-2013



2012 Adjusted Pipeline percent of Stretch Goal	
PGE: 92%	PAC: 92%
NWN: 74%	CNG: 96%

Program Activity		
Activity	2012	2011
<i>Studies Assigned</i>	68	118
<i>Studies Approved</i>	61	100
<i>Offers Signed</i>	325	339
<i>Offers Counter-Signed</i>	263	310
<i>Projects Completed</i>	977	976

Special Considerations:

Overall:

- According to preliminary 2012 annual results, Production Efficiency closed the year at 92 percent of its stretch electric savings goal and 76 percent of its stretch gas savings goal. A higher-than-average number of gas projects—all relatively large—delayed completion from Q4 2012 to early 2013.
- This year's volume was practically the same as 2011, despite the lack of end-of-year offers (e.g., 2012 Fall Bonus). The continuing high volume of projects reflects the growing success of streamlined track offerings (both lighting and small industrial and agricultural projects) across all industrial markets.
- The kick-start bonus served 372 projects in 2012, representing 38% of completed projects. The kick-start bonus provided a 20 percent higher incentive payment for customers who ordered equipment within 90 days of receiving project approval; it was intended to help move participants through the program more quickly.
- The number of studies conducted is down from last year, but this is partly due to an increase in direct offers which is not currently captured in the Program Activity table, but if did, would illustrate the offset in activity.

PGE

- Preliminary 2012 annual results have Production Efficiency achieving 92 percent of its PGE stretch savings goal, while spending 80% of the incentive budget.
- Custom projects accounted for 40 million kWh of savings (50%), 19 million kWh came through Strategic Energy Management offerings (24%), 15 million kWh through lighting projects (19%), 5 million kWh through the small industrial and agricultural initiative (6%) and 1 million kWh of savings through custom operations and maintenance projects (1%).
- The first five Scientific Irrigation Scheduling projects completed in PGE territory, contributing 65,367 kWh in Clackamas, Marion and Yamhill counties.
- The tremendously robust pipeline for 2013 may require care to avoid overspending the incentive budget.

PAC

- According to preliminary 2012 annual results, Production Efficiency ended 2012 at 92 percent of its Pacific Power stretch savings goal while spending 69% of the incentive budget.
- Custom projects accounted for 16 million kWh of savings (34%), Strategic Energy Management engagements equaled 16 million kWh (34%), lighting projects accounted for 9 million kWh (19%), small industrial and agricultural projects equaled 2 million kWh (4%), and custom operations and maintenance projects accounted for 4 million kWh of savings (9%), establishing a diverse range in source of savings.
- The first five Scientific Irrigation Scheduling projects completed in Pacific Power territory, contributing 265,049 kWh in Jefferson, Klamath, Marion and Umatilla counties.
- The 2013 pipeline is comparable to the beginning of 2012.

NWN

- According to preliminary 2012 annual results, Production Efficiency achieved 74 percent of its NWN stretch savings goal, while spending 47% of the incentive budget.
- Small industrial and agricultural projects accounted for 50 percent of NWN savings in 2012, or 380,811 therms, while the other half came from custom projects, with 377,515 therms.
- Strategic Energy Management efforts derived gas savings of 81,200 annual therms at two sites through low-cost and no-cost changes.
- A robust pipeline for 2013 looks to help the program improve over the performance in the territory in 2012. A few large projects that pushed from 2012 to 2013 late in the year strongly influenced 2012's result as well as 2013's outlook.

CNG

- According to preliminary 2012 annual results, Production Efficiency achieved 96 percent of its Cascade Natural Gas stretch savings goal, while spending 105% of the incentive budget. The overrun was due to the unexpectedly large percentage of savings (70%) coming from two projects with the kick-start bonus.
- Custom projects accounted for 120,013 therms, 99 percent of total savings for Cascade Natural Gas. Small industrial and agricultural projects accounted for the remaining 1,049 therms saved.
- 2013's pipeline, which relies on a small number of projects, is in line with expectations for this time of the year.

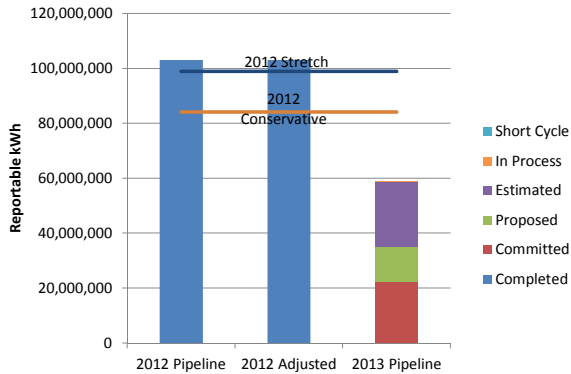
Commercial Programs Summary

January 1, 2013

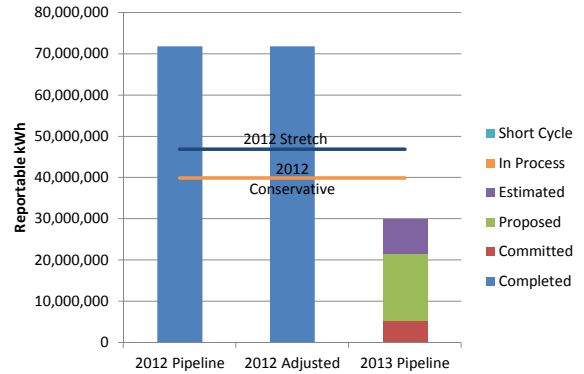
Commercial Sector		PGE	PAC	NWN	CNG
Achievement	2012 Achievement to Date (Rpt kWh or therm)	103,045,434	71,819,738	2,315,126	161,154
	To date % of Conservative goal	123%	180%	152%	118%
	To date % of stretch goal	104%	153%	129%	100%
Context	Historical % of actual accomplishment	100%	100%	100%	100%

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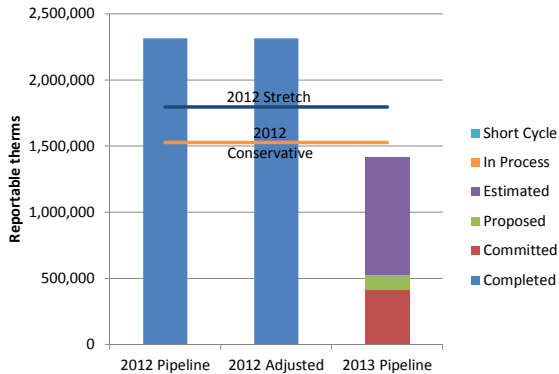
PGE Savings Pipeline 2012-2013



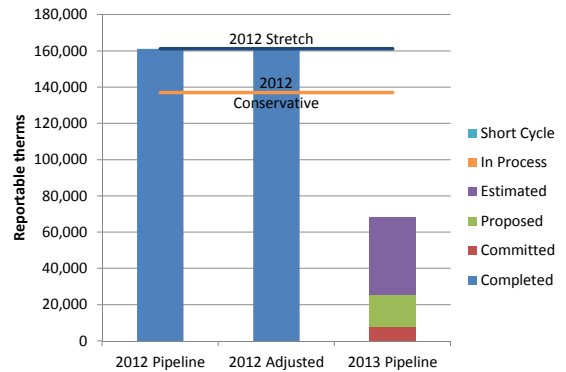
PAC Savings Pipeline 2012-2013



NWN Savings Pipeline 2012-2013



CNG Savings Pipeline 2012-2013



2012 Adjusted Pipeline percent of Stretch Goal	
PGE: 104%	PAC: 153%
NWN: 129%	CNG: 100%

Special Considerations:

Overall

- The Commercial Sector achieved Stretch goal in all utilities for 2012 and established a strong pipeline for 2013.
- The Sector succeeded in a fourth quarter effort to close the gap to Stretch in CNG with a focus on Roof-Top Tune-Ups, and Steam Traps in Existing Buildings.
- The Existing Buildings Kick-Start Bonus (KSB) offer contributed significantly to the 2012 savings with over 1,385 projects completing across all utilities.
- Oregon has seen unprecedented growth in data centers over the past few years, a trend we see continuing. In response the New Buildings Program Launched a new data center offer, that will streamline the NB process, and is scaled to meet the needs of large enterprise, mid-tier, localized and small buildings that range in size anywhere from >10MW load data server "farm" to an office building with a <10kW load.
- The sector collaborated closely with ODOE on the State's Cool School initiative by providing outreach and planning services to schools to help them leverage ODOE's SB 1149 schools funds. In 2012 the Existing Buildings contacted over 30 school districts; in 2012 8 projects completed and there are 14 projects in the pipeline going into 2013.
- Multifamily deepened outreach efforts focusing on cultivating existing relationships with decision makers at top property management agencies. In addition, focus on direct install, custom measures, and mid-stream incentives has put us ahead of historic accomplishments with lower incentive spending than anticipated.
- Multifamily is continuing work with local, regional and national organizations to develop and deploy an on-bill financing pilot called MPower Oregon.
- The Sector's Strategic Energy Management Initiative is off to a strong start and is brought in nearly 6 million kWh and 127,000 therms in 2012.

PGE

- The Existing Buildings program achieved 92 percent of the stretch goal with 78 percent of the incentive budget and established a pipeline for 2013 stronger than ever before in the programs history .
- The New Buildings program achieved 154 percent of the Stretch goal. Large projects led savings results this year, including three hospitals and a number of small commercial projects.
- Multifamily exceeded Stretch goals due to increased custom and prescriptive savings that were brought into the pipeline since the end of Q2, at which time the program was forecast to exceed only conservative goal.

PAC

- The Existing Buildings program exceed the 2012 Stretch goal by 18 percent with only 7 percent more incentives than originally anticipated. The program is worked to actively manage projects and studies so that this increased budget is not exceeded.
- New Buildings achieved 248 percent of Stretch goal in large part due to a large project that closed in Q3.
- Existing Multifamily achieved 132 percent of stretch goal, 48 percent more savings than accomplished in 2011.

NWN

- Existing Buildings achieved 153 percent of the 2012 stretch goal, due in part to large custom projects and high uptake of the Rooftop Tune-up Offering.
- New Buildings achieved 98 percent of Stretch Goal, closing 132 projects and enrolling 262 new projects.
- Multifamily achieved double the savings than in 2011 but only achieved 77 percent of Conservative goal due to delays with a large shifting that was anticipated in the goal setting. This project with a key affordable housing agency was initiated in 2010 and struggled to obtain financing throughout 2011 and 2012. After extensive efforts by Energy Trust to assist this project in obtaining financing the project is re-energized and is expected to complete in 2014.
- NWN DSM projects achieved 313 percent of the DSM stretch goal for commercial at 120 percent of the incentive budget.

CNG

- Existing Buildings achieved 93 percent of Stretch Goal with 80 percent of the anticipated incentive budget.
- New Buildings exceeded Stretch goal by 11 percent with a more diverse set of projects than previous years including schools, healthcare, and higher education.

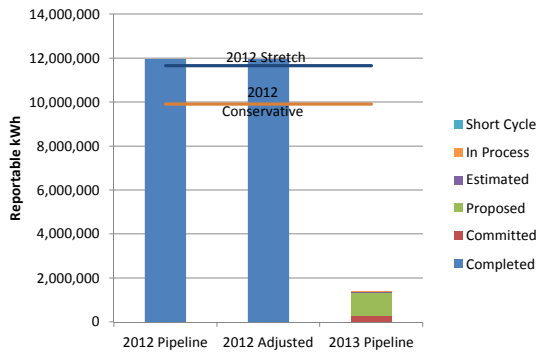
Existing Multifamily Summary

January 1, 2013

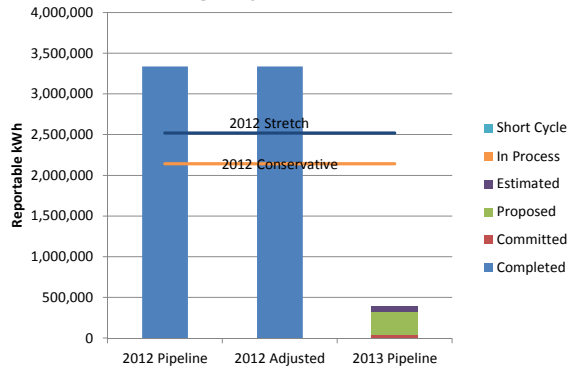
Program: Existing Multifamily		PGE	PAC	NWN	CNG
Achievement	2012 Achievement to Date (Rpt kWh or therm)	11,968,495	3,339,205	103,492	2,846
	To date % of Conservative goal	121%	156%	77%	0%
	To date % of stretch goal	103%	132%	65%	0%
Context	Historical % of actual accomplishment	100%	100%	100%	0%
	To Date % of Incentive Budget Spent	73%	113%	35%	0%

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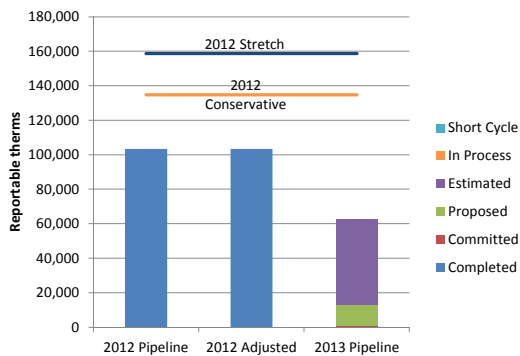
PGE Savings Pipeline 2012-2013



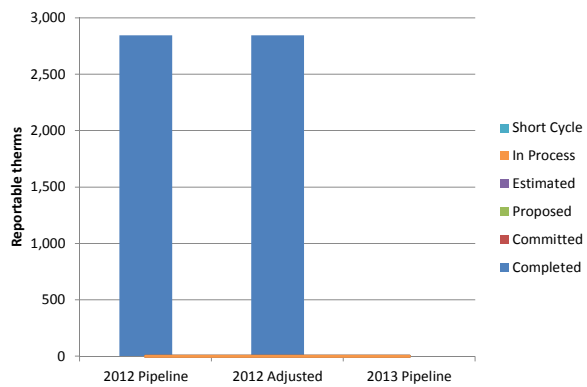
PAC Savings Pipeline 2012-2013



NWN Savings Pipeline 2012-2013



CNG Savings Pipeline 2012-2013



Special Considerations:

Overall

- In 2012 Existing Multifamily saw robust growth in savings of over 33 percent more annual kWh and 106 percent more annual therms compared to 2011.
- Instant Savings Measures (ISMs) and direct install continue to make up the majority of the electric savings for Existing Multifamily and made up 75 percent and 60 percent of the overall electric and gas stretch goals for 2012. This level of contribution is down from previous years and continues the trend towards a more robust portfolio of offerings.
- Savings from custom, common area lighting and prescriptive measures are continuing to grow compared to previous years and are expected to contribute more robust and varied savings in 2013.
- The strong year for Existing Multifamily was a direct result of the Business Development emphasis on cultivating new and further developing existing relationships with key-decision makers at the top property management and affordable housing agencies.

Q4 Accomplishments

- Following the successful RFP selection process in Q3 the ES Refrigerator Midstream Promotion was launched with three regional appliance distributors and resulted in over 160 refrigerators in Q4 and set the stage for continued growth in 2013
- The Common Area Lighting track continued to increase its contribution to overall electric savings achievement with the track bringing in over 2 million kWh in 2012 of which 1,325,078 kWh was brought in during Q4 alone. There is also a considerable lighting pipeline built for 2013 compared to previous years.
- Work continued with local, regional and national organizations to develop and deploy an on-bill repayment pilot called MPower Oregon throughout Q4 with the first building reaching completion of the audit and underwriting process and several others are expected to be ready to start construction in Q1 2013.

How we are positioning the program to achieve savings

- The HE Clothes Washer mid-stream buy-down promotion launched in Q1 2011 came to an end in Q4 and resulted in over 110 units installed during 2012 through a single distributor. A new RFP targeted at involving more key regional appliance distributors was developed to reintroduce the initiative in Q1 2013.
- A comprehensive lighting pilot targeted at memory care facilities completed its outreach to identify possible pilot participants. Out of the buildings that applied to participate, three buildings in PGE territory were selected to participate in the pilot during the first half of 2012.

PGE

- PGE year-to-date results came in at 103 percent of stretch goal, 4 percent higher than 2011, while still remaining within the incentive budget for the year.
- Lighting trade allies were able to use the Kick-Start Bonus offering to sell numerous lighting projects in PGE territory, and common area lighting was responsible for 13 percent of the total savings in PGE service territory for the year.
- Modest savings came in during the first two quarters of the year as a direct result of the Comfort Now bonus for bundled weatherization projects. The resulting savings of this promotion, which offered building owners and trade allies a 20 percent Incentive bonus to install projects before June 30th 2012, were over 314,000 kWh.
- Existing Multifamily has continued to take steps to conduct studies with affordable housing agencies served primarily by PGE to develop long-term strategies to achieve savings in this underserved market through MPower Oregon. The first capital projects from this initiative are expected to be completed in Q1 2013.

PAC

- Existing Multifamily year-to-date results came in at 132 percent of stretch goal, 48 percent higher than 2011. The high activity in PAC service territory led to an overage in the incentive budget of approximately \$54,000 for the year.
- Lighting trade allies were able to use the Kick-Start Bonus offering to sell numerous lighting projects in PAC territory, and common area lighting was responsible for 10 percent of the total savings in PAC service territory for the year.
- Existing Multifamily successfully developed the custom study and project pipeline in 2011 which brought forward several projects that resulted in 7 percent of total savings in 2012.
- When forecast results illustrated that the program was on track to vastly exceed the stretch goal for 2012 the business development staff shifted active outreach from direct-install efforts to focus on developing 2013 opportunities through custom and common area lighting opportunities which created a strong pipeline for the first half of 2013.

NWN

- Existing Multifamily year-to-date results came in at 65 percent of the stretch goal and 77 percent of the conservative goal, 101 percent more savings than in 2011, in NW Natural service territory.
 - Missing the conservative goal while still doubling savings from the previous year is directly related to a large, internally managed, custom project with a key affordable housing agency that was initiated in 2010 and struggled to obtain financing throughout 2011 and 2012. After extensive efforts by Energy Trust to assist this project in obtaining financing the project is re-energized and is expected to complete during Q1 2014.
- Program staff saw a sharp rise in therm savings in Q3 which is typically the warmer quarters of the year when large custom and prescriptive HVAC projects are typically completed and processed.
- Existing Multifamily successfully developed the custom study and project pipeline in 2011 which brought forward several projects that resulted in 32 percent of total savings in 2012. The custom track brought in over 26,800 therms in Q4 alone.
- Program staff continued efforts with Planning and Evaluation to add and modify gas measures to diversify program offerings, evaluate potential impacts regarding the uncertainty around gas avoided costs and accelerate gas efficiency projects into 2013.

CNG

- The program did not have associated savings goals or incentive budget for this service territory in 2012. It has still served customers of CNG, bringing in over 2,800 therms through direct install and prescriptive projects.
- As a result of the increased 2012 customer interest in CNG service territory and the move of small multifamily properties (2-4 attached units) to the Existing Multifamily, the program has included modest savings goals and associated budget for CNG in 2013.

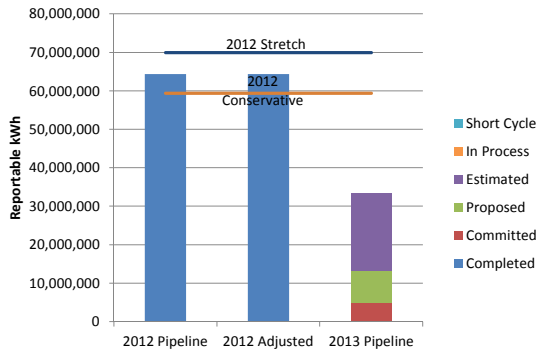
Existing Buildings Summary

January 1, 2013

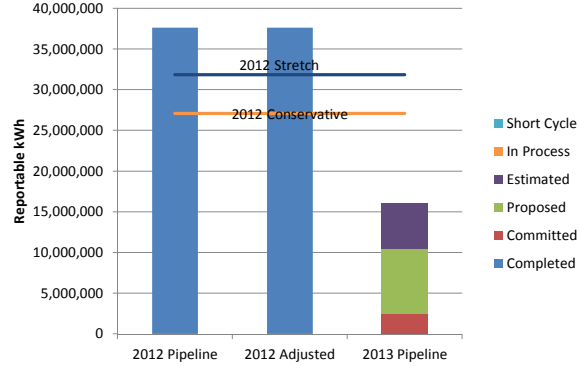
Program: Existing Buildings		PGE	PAC	NWN	CNG
Achievement	2012 Achievement to Date (Rpt kWh or therm)	64,384,961	37,622,077	1,673,779	109,413
	To date % of Conservative goal	108%	139%	180%	110%
	To date % of stretch goal	92%	118%	153%	93%
Context	Historical % of actual accomplishment	100%	100%	100%	100%
	To Date % of Incentive Budget Spent	78%	107%	137%	80%

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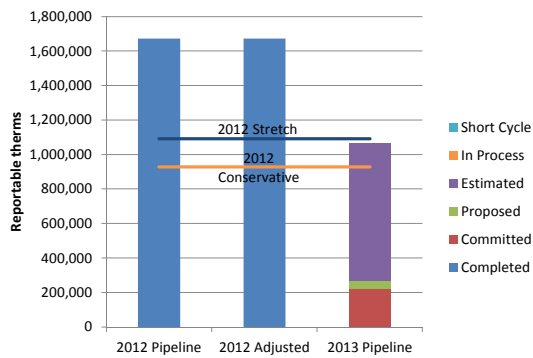
PGE Savings Pipeline 2012-2013



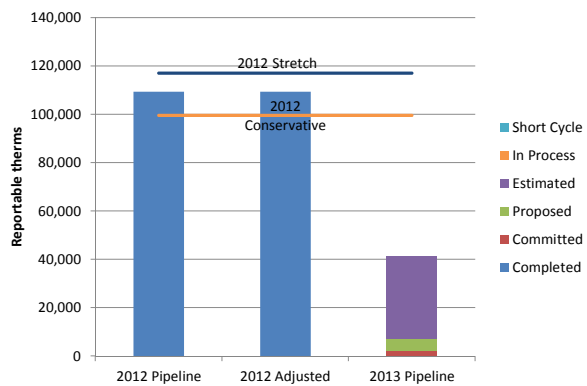
PAC Savings Pipeline 2012-2013



NWN Savings Pipeline 2012-2013



CNG Savings Pipeline 2012-2013



Special Considerations:

Overall:

- Based on preliminary 2012 annual results, Existing Buildings achieved 100 percent of its electric stretch goal and 147 percent of its gas stretch goal.
- The pipeline for 2013 is stronger than ever in the program's history.
- The Kick-Start Bonus offer, a 20 percent incentive increase for lighting and custom projects, contributed significantly to 2012 results. Of the projects that met the June 29, 2012, deadline for an incentive offer, 1331 closed in 2012 and more remain in the pipeline for 2013.
- Contracted program management successfully transitioned from Lockheed Martin to ICF at the close of 2012.
- 2012 was the first year for the Commercial Strategic Energy Management (SEM) pilot. Seven customers in the 2012 SEM cohort achieved combined savings of 5.8 million kWh and 127,000 therms—representing an average of 5 percent electric savings and 7 percent gas savings from behavioral and operations improvements at each site.
- Program savings were also enhanced by results of the Building Operator Certification, the 80+ initiative that provides incentives to computer manufacturers to produce more expensive energy efficient computer equipment and 3 solar pool heating projects and 3 solar hot water projects.
- The program collaborated with the Oregon Department of Energy to support the Cool Schools initiative by providing schools with audits and project assistance. In 2012 Existing Buildings contacted over 30 school districts; in 2012 8 projects completed and there are 14 projects in the pipeline going into 2013.

PGE

- Based on preliminary 2012 annual results, Existing Buildings achieved 92 percent of its stretch goal for PGE while spending 78 percent of the incentive budget. PGE savings goals were the most ambitious among Energy Trust's four collaborating utilities.
- Of the 64.4 million kWh saved, 84 percent resulted from custom projects, lighting projects, other standard offers, and operations and maintenance projects including roof-top HVAC tune-ups, ; 2 percent was associated with Building Operator Certification scholarships; 6 percent came from 80+ upstream incentives ; and 8 percent resulted from Strategic Energy Management savings.
- The pipeline of PGE projects for 2013 is stronger than ever in the program's history. This advantage, combined with the diverse portfolio of offerings available to customers, should put the 2013 stretch goal within reach—albeit requiring significant effort due to the maturity of the commercial market for energy efficiency in PGE territory.

PAC

- Based on preliminary 2012 annual results, Existing Buildings achieved 118 percent of its 2012 stretch goal for Pacific Power while spending 107 percent of the incentive budget.
- Strong results derive from both large custom projects and lighting projects.
- Of the 37.6 million kWh saved, 89 percent resulted from custom projects, lighting projects, other standard offers and operations and maintenance projects including roof-top HVAC tune-ups, 2 percent was associated with Building Operator Certification scholarships, 6 percent came from 80+ upstream incentives and 3 percent resulted from Strategic Energy Management savings.
- The exceptionally robust pipeline of projects for 2013 will require careful oversight to avoid overspending the incentive budget.

NWN

- Based on preliminary 2012 annual results, Existing Buildings achieved 153 percent of its 2012 stretch goal for NW Natural while spending 137 percent of the incentive budget.
- Strong results derive both from large custom projects and trade ally-driven participation in roof-top HVAC tune-ups.
- Of the 1.6 million therms saved, 91 percent resulted from custom projects, roof-top tune-ups and standard offers; 1 percent was associated with Building Operator Certification scholarships and 8 percent came from Strategic Energy Management savings.
- The exceptionally robust pipeline of projects for 2013 will require careful oversight to avoid overspending the incentive budget, especially with respect to roof-top HVAC tune-ups.

CNG

- Based on preliminary 2012 annual results, Existing Buildings achieved 93 percent of its stretch goal for Cascade Natural Gas while spending 80 percent of the incentive budget.
- Of the 1.6 million therms saved, 91 percent resulted from roof-top HVAC tune-ups and standard offers, while the remaining 9 percent were came from solar thermal projects.
- The program began 2013 with a substantial pipeline of active projects, suggesting the 2013 stretch goal is within reach.

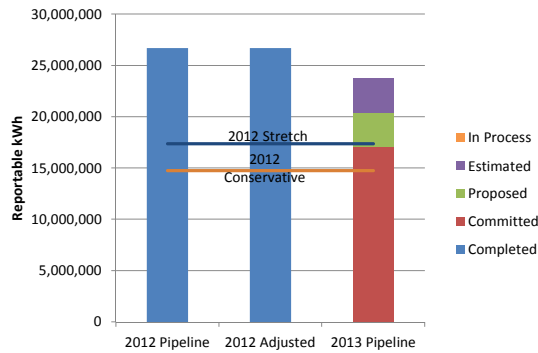
New Buildings Summary

January 1, 2013

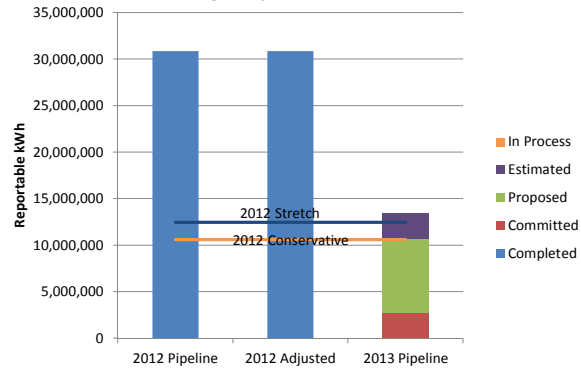
Program: New Buildings		PGE	PAC	NWN	CNG
Achievement	2012 Achievement to Date (Rpt kWh or therm)	26,691,978	30,858,456	537,855	48,896
	To date % of Conservative goal	181%	291%	116%	131%
	To date % of stretch goal	154%	248%	99%	111%
Context	Historical % of actual accomplishment	100%	100%	100%	100%
	To Date % of Incentive Budget Spent	107%	91%	82%	111%

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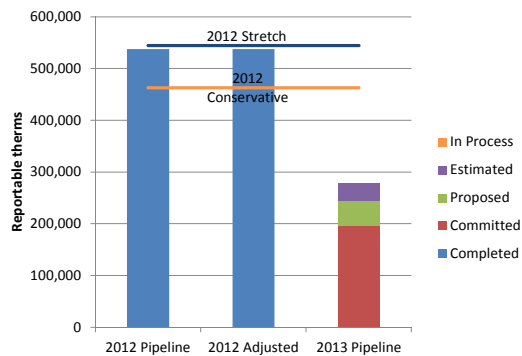
PGE Savings Pipeline 2012-2013



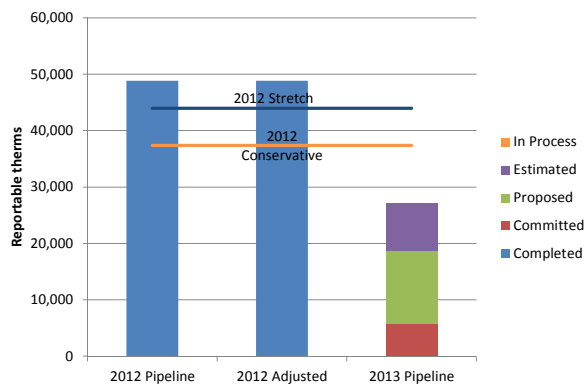
PAC Savings Pipeline 2012-2013



NWN Savings Pipeline 2012-2013



CNG Savings Pipeline 2012-2013



Special Considerations:

Overall

- New Buildings closed strong across electric utilities at 190 percent of stretch, with large projects bringing in a majority of savings. Small commercial resulted in 85 percent of total projects and 60 percent of kWh and 54 percent of therms. A few projects resulted in significant and very cost-effective savings opportunities. Electric savings for the year increased from the multifamily and grocery market sectors.
- New Buildings met the stretch gas goal at 100 percent. Meeting the goal was a challenge at mid-year with two large projects expected in 2012 moving into 2013 that staff quickly responded to, taking steps to close the gap with quick-turn projects and a strong ally network. A wide mix of projects from across the state are mostly attributed to the overall success in meeting goal in addition to a few hospitals closing this year, a trend that is expected to wind down.
- Small commercial opportunities are growing through a program effort to diversify, simplify, and target based on positive Small Commercial Efficiency Pilot results. Launched in 2012 was the first round of the new tiered incentive packages called Market Solutions geared to support office, retail, restaurant, schools, grocery and multifamily.
- Staff also saw positive results produced from the program's market transformation efforts, expanding services such as plan reviews, code compliance reviews and lighting design consultation, resulting in over 2.5 million kWh and 15,000 therms.

Market Solutions

- Based on the successful results of the Small Commercial Efficiency Pilot, a regular offer to serve the needs of this market segment was introduced in 2012. The first phase targeted small office, restaurant and retail sectors less than 50,000 square feet. The next phase set to launch in Q1 2013 is planned for grocery, schools and multifamily. The offers – called Market Solutions – are comprehensive packages of measures with modeled savings that eliminate the need for integrated design on what are typically design-build projects. Using a workbook format that is categorized by Good/Better/Best/Very Best, the offers provide simple, achievable bundles of measures that encourage incrementally higher savings; allow flexibility for buildings that have a variety of operating characteristics; and provide incentives for more efficiency HVAC design options. Where small buildings were once limited to just a couple of measures, this format is designed to encourage the adoption of more efficient systems. Estimated savings are 4-20 percent depending on the specific package and building type. New Buildings closed 270 projects under 50,000 square feet in 2011, and expect savings from these projects to be significant.
- Data centers locating to Oregon have brought significant savings opportunities, a trend we see continuing and what prompted development of the new data center offer. The new offer, launched in July, is a series of incremental changes that streamlined the process and is scaled to meet the needs of large enterprise, mid-tier, localized and small buildings that range in size anywhere from >10MW load data server “farm” to an office building with a <10kW load. The new offer emphasizes early involvement through design assistance, focus heavily on IT design, and introduces new measures like power supply and power distribution. In cases where early design assistance is not warranted due to the limited scope of a project, such as with an office data closet or room, straightforward standard measures are available.

PGE

- With preliminary annual savings of 26.6 million kWh, New Buildings ended 2012 at 153 percent above the stretch savings goal.
- Grocery, data centers, office and k-12 schools alone resulted in 17.1 million kWh.
- Overall the program closed 192 new construction projects in 2011 and enrolled 225 new projects.

PAC

- With preliminary annual savings of 30 million kWh in Pacific Power territory, New Buildings ended 2012 at 247 percent above stretch goal.
- The main factor in this success was the ability of the technical team to influence early design decisions for a large data center that completed in 2012.
- Overall the program closed 107 new construction projects in 2011 and enrolled 149 new projects.

NWN

- With preliminary annual savings of 537,000 annual therms, New Buildings reached 98 percent of its NW Natural stretch goal for 2012.
- Overall the program closed 132 new construction projects in 2012 and enrolled 262 new projects.
- Large savings projects included a school and a couple of hospitals, with the school bringing in 10 percent of total utility savings. Many smaller restaurant projects and grocery projects also resulted in significant savings.

CNG

- With preliminary annual savings of 48,896 therms, New Buildings exceeded the 2012 stretch goal for Cascade Natural Gas by 11 percent.
- Program managers attribute the strong results to growing awareness of the program, resulting in an increasingly diverse set of projects. Several schools produced the majority of the savings, while other projects included healthcare facilities, higher education and office and administrative buildings.
- Overall the program closed a record 24 new construction projects in 2012 and enrolled 38 new projects.

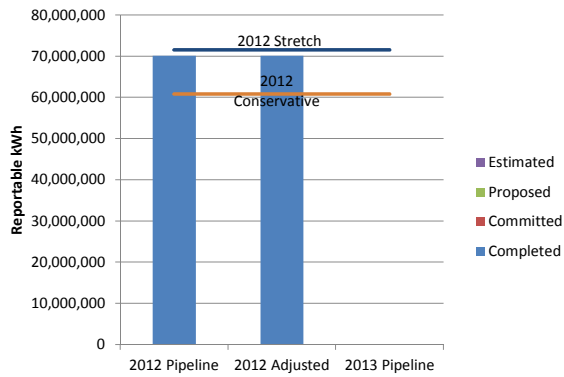
Residential Programs Summary

January 1, 2013

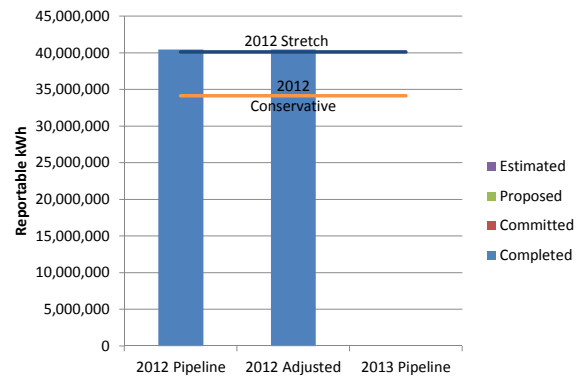
Residential Sector		PGE	PAC	NWN	CNG
Achievement	2012 Achievement to Date (Rpt kWh or therm)	70,120,958	40,466,970	2,411,197	148,853
	To date % of Conservative goal	115%	119%	117%	118%
	To date % of stretch goal	98%	101%	100%	100%
Context	Historical % of actual accomplishment	100%	100%	100%	100%

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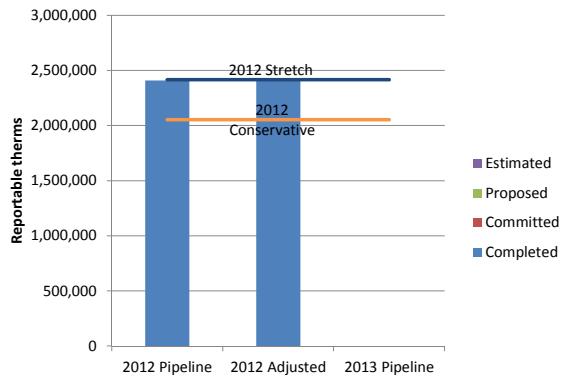
PGE Savings Pipeline 2012-2013



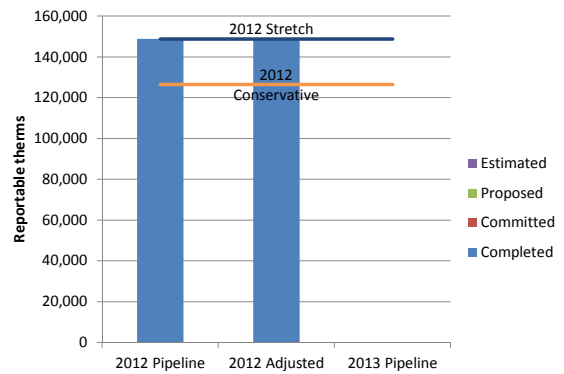
PAC Savings Pipeline 2012-2013



NWN Savings Pipeline 2012-2013



CNG Savings Pipeline 2012-2013



2012 Adjusted Pipeline percent of Stretch Goal	
PGE: 98%	PAC: 101%
NWN: 100%	CNG: 100%

Special Considerations:

Overall

- More than 3,000 homes cumulatively have been built with an EPS. In 2012 1,320 EPS homes were built, exceeding the program goal by almost 100 percent; 520 EPS homes, or 39 percent, were submitted in Q4.
- The Existing Homes program surpassed annual stretch savings goals in three utilities—PGE, PAC, and NW Natural, and achieved 95 percent of stretch savings goals in CNG.
- Q4 Energy Saver Kit promotions were successful in achieving forecasted savings gaps.
- Ductless Heat Pumps along with Gas Fireplaces and ENERGY STAR Gas Tank Water Heaters continue to be key single measure savings drivers across each utility.
- Of the approximate 8.5 million kWh that the program recognized in the retail lighting category during Q4 approximately 8 percent of those savings came from select LED products that were added to the Simple Steps portfolio in Q4.
- Slower than expected retail sales and a major retailer converting a large number of specialty CFLs to LED lighting (which the program did not support at the time) contributed to lower than expected savings for the Products program.
- Solaire Homes built a home with an EPS of zero, the lowest score the program has seen since the inception of EPS.

PGE

- The New Homes and Products program achieved 85 percent of the PGE stretch goal, with 33 percent of the total PGE savings for 2012 (9,388,985 kWh) recognized in Q4.
- The Products Program launched new LED measures at select Costco and Home Depot retail locations in December.
- At the end of November a targeted marketing campaign focused on fridge recycling went to 20,000 customers of PGE & PAC who purchased a new fridge or freezer but did not recycle their old unit.
- Existing Homes achieved 110 percent of the stretch savings goal, recognizing more than 41,248,568 kWh savings for the year.
- Energy Saver Kits delivered more than 9,000,000 kWh of savings in Q4 – through a Cyber Monday email from PGE - over 15,000 of 96,600 PGE customers receiving the email ordered a kit with a 21 percent open rate on the first day of the email drop.
- Existing Mobile Homes activity increased in Q4, with over 400,000 kWh of savings recognized, accounting for more than 30 percent of annual volume in this track.
- In Q4, 251 Ductless Heat Pumps were installed, bringing the year to date total to 655 units installed. This an annual increase of nearly 50 percent compared to 2011.
- In Q4, 110 Tier II Heat Pump Water Heaters were installed, driven primarily by successful PGE marketing promotion.

PAC

- New Homes and Products achieved 74 percent of the PAC stretch goal, with 38 percent of the total PAC savings for 2012 (6,319,867 kWh) recognized in Q4.
- The lowest EPS in the state was built in Pacific Power territory. Solaire Homes built a home with an EPS of zero, the lowest score the program has seen since the inception of EPS.
- Efficient new manufactured home purchases doubled in Q4 totaling more than any of the previous quarters, coming in at 49, as compared to 37 homes submitted in Quarters 1-3, driven by a focus on year-end communication and outreach.
- Existing Homes achieved 137 percent of the stretch savings goal, recognizing more than 23,678,921 kWh savings for the year.
- In an effort to manage the incentive budget cap, strategies to control Existing Mobile Homes duct sealing activity were implemented.
- An Energy Saver Kit direct mail targeted to past Energy Trust Products program participants recognized a high response rate, resulting in 9 percent of recipients ordering an Energy Saver Kit, far exceeding the 3 percent forecasted response rate.
- In Q4, 156 Ductless Heat Pumps were installed, bringing the total to 387 units for the year; this is more than 130 percent of the 2012 budgeted goal of 293 units.
- In coordination with Pacific Power, relationships with 3 Community Action Agencies resulted in delivering 300 “carry home savings” kits to help their clients save energy.
- Rogue Valley Green and Solar Home Tour took place in Q4 which included a record high of 7 EPS homes in the tour.

NWN

- New Homes and Products achieved 90 percent of the stretch goal, with 36 percent of the total NWN savings for 2012 with 256,307 therms recognized in Q4.
- Overall 980 EPS homes were built in NWN territory in 2012 compared to 450 EPS homes in 2011 (a 50 percent increase) with 428 EPS homes coming through the program in Q4 alone.
- 317 of the 340 air sealing pilot homes were heated by NW Natural Gas.
- Existing Homes achieved 105 percent of the stretch savings goal, recognizing 1,692,671 therms for the year.
- In Q4, 189 Energy Star Gas Tank Water Heaters were installed, bringing the annual total to more than 450 installed units.
- In Q4, 522 gas hearths were installed, bringing the annual total to 1,177 units, representing a 20 percent increase over 2011 installation levels of 953 units.
- There were 404 CEWO projects completed in Q4, resulting in almost 90,000 therms of savings.

CNG

- The program achieved 107 percent of the stretch goal, with 39 percent of the total CNG savings for 2012 (25,716 therms) recognized in Q4. Overall 137 EPS homes were built in CNG territory.
- Existing Homes achieved 95 percent of the stretch savings goal, recognizing 82,615 therms for the year.
- Direct installation of Instant Savings Measures and Energy Saver Kit were delivered to close a savings gap from a large Sun River project which shifted to 2013.
- Weatherization savings accounted for nearly 6,000 therms in Q4, accounting for more than 45 percent of the annual weatherization savings.
- Nearly 800 students participated in energy efficiency education through the LivingWise curriculum.
- Central Oregon Green and Solar Home Tour featured 6 homes built with EPS.
- The program worked with the City of Redmond to distribute 800 showerheads to their customers.

Existing Homes Summary

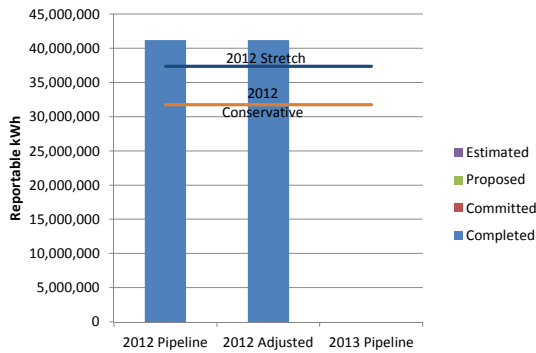
January 1, 2013

Program: Existing Homes		PGE	PAC	NWN	CNG
Achievement	2012 Achievement to Date (Rpt kWh or therm)	41,248,568	23,678,921	1,692,671	82,615
	To date % of Conservative goal	130%	161%	123%	112%
	To date % of stretch goal	110% *	137%	105% *	95%
Context	Historical % of actual accomplishment	100%	100%	100%	100%
Budget	To Date % of Incentive Budget Spent	96%	117%	81%	44%

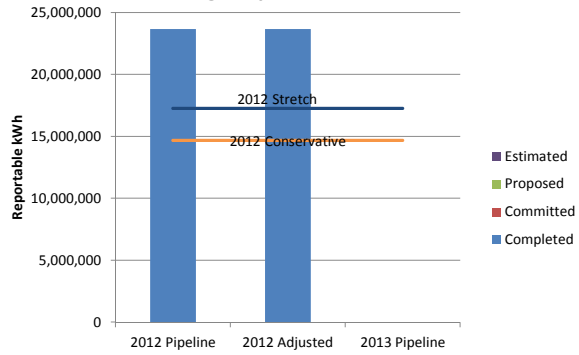
* OPOWER Pilot Savings achievement is committed and not yet recognized.

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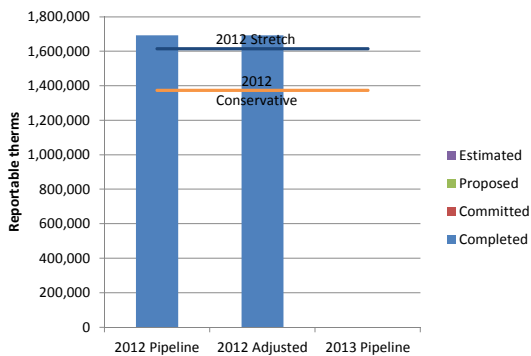
PGE Savings Pipeline 2012-2013



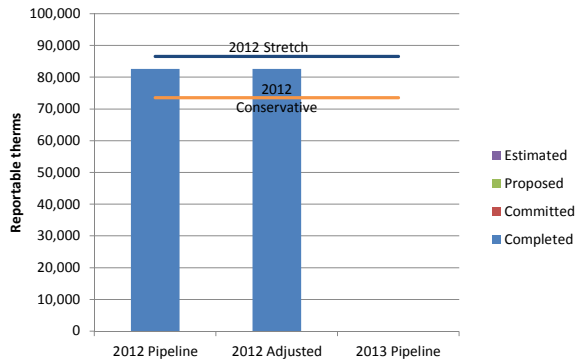
PAC Savings Pipeline 2012-2013



NWN Savings Pipeline 2012-2013



CNG Savings Pipeline 2012-2013



Special Considerations

Overall

- The Existing Homes program surpassed annual stretch savings goals in three utilities—PGE, PAC, and NW Natural, and achieved 95 percent of stretch savings goals in CNG.
- Q4 Energy Saver Kit promotions successfully filled gaps in forecasted annual results.
- Ductless Heat Pumps along with Gas Fireplaces and ENERGY STAR Gas Tank Water Heaters continue to be key single measure savings drivers across each utility.

PGE

- Existing Homes achieved 110 percent of the stretch savings goal, recognizing more than 41,248,568 kWh savings for the year.
- Energy Saver Kits delivered more than 9 million kWh of savings in Q4. After receiving PGE's Cyber Monday email, more than 15,000 of 96,600 PGE customers receiving the email ordered a kit, with a 21 percent open rate on the first day of the email drop.
- Existing Mobile Homes activity increased in Q4, with over 400,000 kWh of savings recognized, accounting for more than 30 percent of annual volume in this track.
- In Q4, 251 ductless heat pumps were installed, bringing the 2012 total to 655 units installed. This is an annual increase of nearly 50 percent compared to 2011.
- In Q4, 110 Tier II Heat Pump Water Heaters were installed, driven primarily by successful PGE marketing promotion.

PAC

- Existing Homes achieved 137 percent of the stretch savings goal, recognizing more than 23,678,921 kWh savings for the year.
- In an effort to manage the incentive budget cap, strategies to control Existing Mobile Homes duct sealing activity were implemented.
- An Energy Saver Kit direct mail targeted to past Energy Trust Products program participants recognized a high response rate, resulting in 9 percent of recipients ordering an Energy Saver Kit, far exceeding the 3 percent forecasted response rate.
- In Q4, 156 Ductless Heat Pumps were installed, bringing the total to 387 units for the year; this is more than 130 percent of the 2012 budgeted goal of 293 units.

NWN

- Existing Homes achieved 105 percent of the stretch savings goal, recognizing 1,692,671 therms for the year.
- In Q4, 189 Energy Star Gas Tank Water Heaters were installed, bringing the annual total to more than 450 installed units.
- In Q4, 522 gas hearths were installed, bringing the annual total to 1,177 units, representing a 20 percent increase over 2011 installation levels of 953 units.
- There were 404 CEWO projects completed in Q4, resulting in almost 90,000 therms of savings.

CNG

- Existing Homes achieved 95 percent of the stretch savings goal, recognizing 82,615 therms for the year.
- Direct installation of Instant Savings Measures and Energy Saver Kit were delivered to close a savings gap from a large Sun River project which shifted to 2013.
- Weatherization savings accounted for nearly 6,000 therms in Q4, accounting for more than 45 percent of the annual weatherization savings.
- Nearly 800 students participated in energy efficiency education through the LivingWise curriculum.

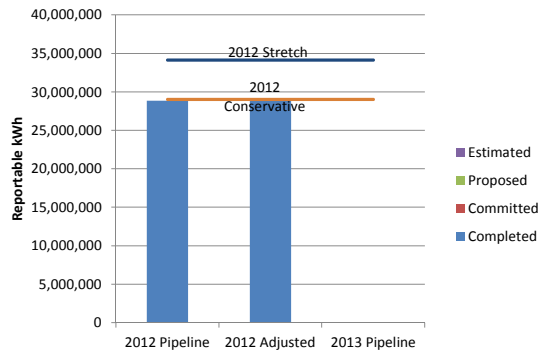
New Homes And Products Summary

January 1, 2013

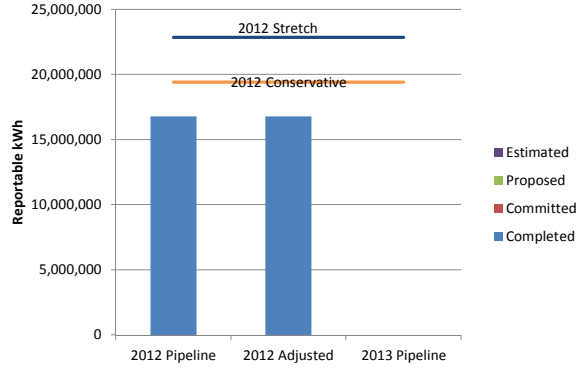
Program: New Homes & Products		PGE	PAC	NWN	CNG
Achievement	2012 Achievement to Date (Rpt kWh or therm)	28,872,390	16,788,049	718,526	66,238
	To date % of Conservative goal	99%	86%	106%	125%
	To date % of stretch goal	85%	73%	90%	107%
Context	Historical % of actual accomplishment	100%	100%	100%	100%
Budget	To Date % of Incentive Budget Spent	83%	74%	151%	117%

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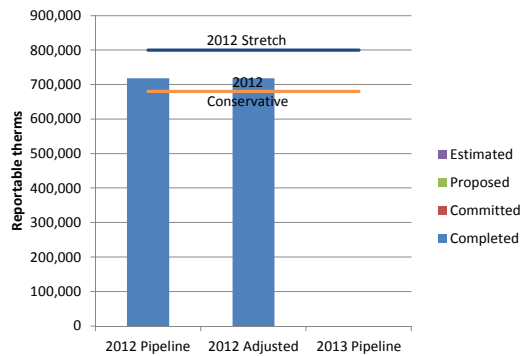
PGE Savings Pipeline 2012-2013



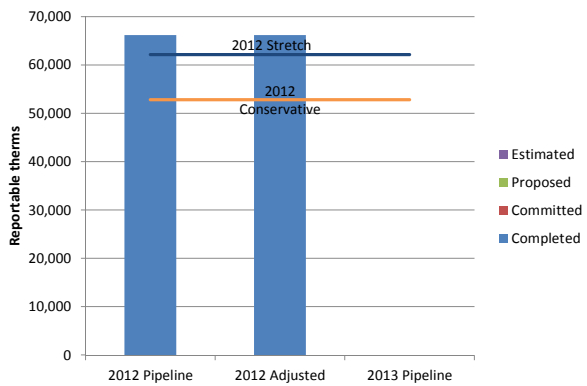
PAC Savings Pipeline 2012-2013



NWN Savings Pipeline 2012-2013



CNG Savings Pipeline 2012-2013



Special Considerations

Overall

- The Program achieved 80 percent of the electric stretch goal and 91 percent of the gas stretch goal for 2012, with over a third of total saving coming in Q4.
- 1,320 EPS homes were built in 2012, exceeding the program goal by almost 100 percent. 520 of these homes, or 39 percent, were submitted in Q4. Increased activity in the housing market along with a continued strong market share (over 20 percent) of EPS homes were the main contributors the success of the New Homes program in 2012.
- Overall slower than expected retail sales and a major retailer converting a large number of specialty CFLs to LED (which the program did not support at the time) contributed to lower than expected savings for the Products program.
- 340 total homes came through the air sealing pilot in 2012. The pilot is designed to work with insulation and drywall subcontractors to decrease the air leakage in non-program homes. 212 of these homes, or 62 percent, were submitted in Q4. We expect to see continued uptake in 2013.
- Of the approximate 8.5 million kWh that the program recognized in the retail lighting category during Q4 approximately 8 percent of those savings came from select LED products that were added to the Simple Steps portfolio in Q4.

PGE

- The program achieved 85 percent of the PGE stretch goal, with 33 percent of the total PGE savings for 2012 (9,388,985 kWh) recognized in Q4.
- At the end of November a targeted marketing campaign focused on fridge recycling went to 20,000 customers of PGE & PAC who purchased a new fridge or freezer but did not recycle their old unit.
- Launched new LED measures at select Costco and Home Depot retail locations in December.
- PGE community office engagement with product of the month giveaway was wrapped up in December with 5,150 bulbs distributed in Q4 after a successful year of 28,500 total bulbs distributed during 2012. We plan to continue the engagement into 2013.

PAC

- The program achieved 74 percent of the PAC stretch goal, with 38 percent of the total PAC savings for 2012 (6,319,867 kWh) recognized in Q4.
- The lowest EPS in the state was built in Pacific Power territory. Solaire Homes built a home with an EPS of zero, the lowest score the program has seen since the inception of EPS.
- At the end of November a targeted marketing campaign focused on fridge recycling went to 20,000 customers of PGE & PAC who purchased a new fridge or freezer but did not recycle their old unit.
- Efficient new manufactured home purchases doubled in Q4 totaling more than any of the previous quarters, coming in at 49, as compared to 37 homes submitted in Quarters 1-3, driven by a focus on year-end communication and outreach.
- In coordination with Pacific Power, relationships with 3 Community Action Agencies resulted in delivering 300 "carry home savings" kits to help their clients save energy.
- Rogue Valley Green and Solar Home Tour took place in Q4 which included a record high of 7 EPS homes in the tour.

NWN

- The program achieved 90 percent of the stretch goal, with 36 percent of the total NWN savings for 2012 (256,307 therms) recognized in Q4.
- Overall 980 EPS homes were built in NWN territory in 2012 compared to 450 EPS homes in 2011 (a 50 percent increase) with 428 EPS homes coming through the program in Q4 alone.
- 317 of the 340 air sealing pilot homes were heated by NW Natural Gas. The air sealing pilot saw the highest submission rate in the Portland Metro area with NW Natural Gas heated homes.

CNG

- The program achieved 107 percent of the stretch goal, with 39 percent of the total CNG savings for 2012 (25,716 therms) recognized in Q4. Overall 137 EPS homes were built in CNG territory with 67 in Q4.
- The program worked with the City of Redmond to distribute 800 showerheads to their customers.
- Central Oregon Green and Solar Home Tour featured 6 homes built with EPS.

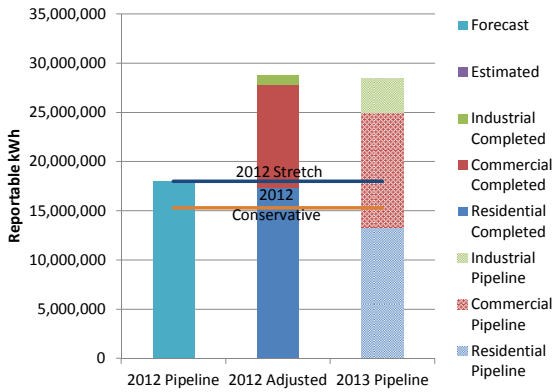
NEEA Summary

January 1, 2013

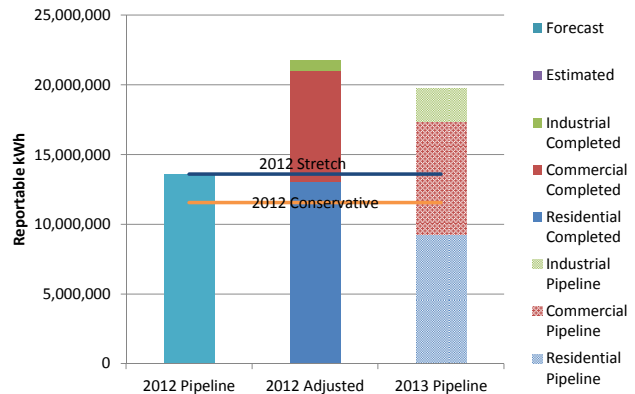
Program: Market Transformation		PGE	PAC	NWN	CNG
Achievement	2012 Achievement to Date (Rpt kWh or therm)	28,864,917	21,775,289	-	
	To date % of Conservative goal	189%	189%		
	To date % of stretch goal	160%	160%		
Context	Historical % of actual accomplishment	100%	100%		
Budget	To Date % of Incentive Budget Spent	N/A	N/A		

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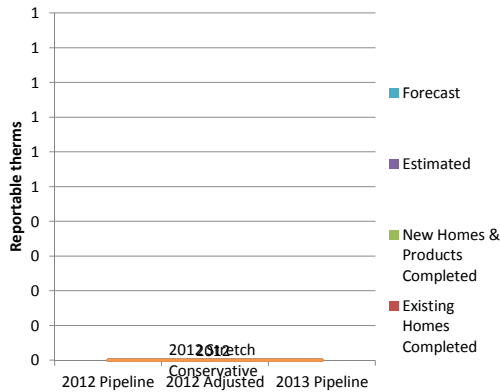
PGE Savings Pipeline 2012-2013



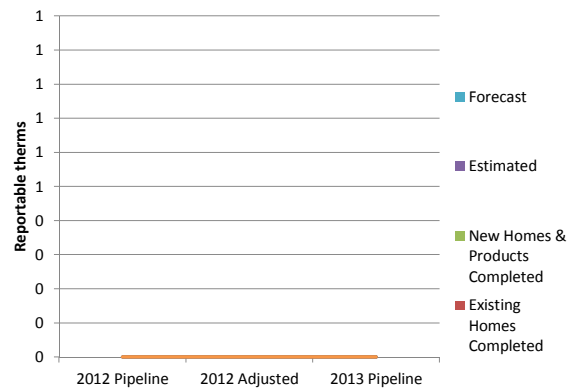
PAC Savings Pipeline 2012-2013



NWN Savings Pipeline 2012-2013



CNG Savings Pipeline 2012-2013



NEEA

- 2012 NEEA results are based upon the best available information to date, but subject to change during NEEA's annual report which will be published in Q2 of 2013. Adjustments will be made during Energy Trust's True Up, if necessary.
- Lower than predicted results in the residential lighting initiative and NEEA's work with food processors was offset by stronger results in the efficient TV initiative and multiple initiatives in the commercial sector.
- 2013 NEEA forecasts are based upon the best available information to date. Updated forecasts will be available at the end of Q2.
- Residential savings are expected in 2013 from the efficient televisions, residential building code, and ductless heat pump initiatives.
- The 80 Plus and Energy Star 5.0 computing equipment, as well as the Building Operator Certification and Commercial Real Estate initiatives are expected to be the primary sources of savings in the commercial sector in 2013.
- NEEA's work with Food Processors, as well as motor standards and rewind practices will be the sources of savings for the industrial sector in 2013. No savings are expected from the agricultural sector.