Energy Trust and Pacific Power
Targeted Load Management Pilot
North Santiam Canyon – Summary Report

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March 5, 2020

Executive Summary

Introduction and Background

Energy Trust and Pacific Power collaborated to develop and implement a pilot project focused on bringing additional value to the grid by deploying existing energy efficiency resources to select areas, as identified by Pacific Power. Specifically, the pilot sought to identify, implement and evaluate targeted existing energy efficiency offerings that could be deployed in a short timeframe to reduce demand on Pacific Power's system at peak times in localized areas. Understanding how fast existing programs could be deployed to a focused area and how the associated impacts could be measured were key objectives of the pilot project. The pilot utilized existing program funding structures to conduct targeted marketing efforts intended to increase participation in existing energy efficiency programs and measures in the North Santiam Canyon. The findings shared within this memo reflect the results of these concentrated efforts over the implementation period of July 1st, 2017 through December 31st, 2018.

The purposes of this memo are to:

- Summarize the objectives and activities conducted
- Present methodology used to estimate incremental peak demand reductions
- Present evaluation findings and staff feedback in context with the results

This memo communicates what we learned and how we will apply those learnings to current and planned activities.

Goals & Objectives

1. Reduce peak demand in the identified geographic area and quantify the load reduction during a specific time period (6-10 a.m. during the winter season).
2. Document and evaluate the effectiveness of replicable, targeted energy efficiency and renewable energy program design that can be rapidly deployed in targeted areas to reduce energy and peak demand at no additional cost.
3. Develop processes for design and deployment whereby Pacific Power and Energy Trust staff take coordinated actions in support of the pilot project related to marketing, program delivery and measurement of impacts.
4. Determine what, if any, changes to existing program offerings and/or new offerings might make targeted deployment more effective.

It is in Energy Trust's strategic interest to better understand and forecast the impact of energy efficiency and renewable energy offerings on peak reduction. Lessons from this project will help develop Energy Trust's internal expertise in this important field of interest.

Evaluation Scope

Energy Trust hired Navigant to conduct a third-party process evaluation of the pilot. The initial scope of work included four tasks:

1. Review project documents, attend meetings and develop work plan
2. Conduct interviews with project stakeholders
3. Conduct interviews with project participants
4. Conduct an engineering review and analysis[1]

Interviews

Navigant held a facilitated group stakeholder discussion on October 16, 2017. To eliminate the expense of a formal report, Energy Trust chose to report the results of Navigant-authored memos (see Appendix 1) and notes in this memo. Further evaluation efforts will be consolidated with the Medford area TLM pilot, where Energy Trust will solicit feedback on how learnings from the North Santiam pilot are being incorporated into the Medford area pilot.

The major findings of the facilitated group stakeholder interviews were:

- Program implementers are accustomed to targeting customers and therefore did not need to change roles or responsibilities to be able to geographically target the same customer segments. The increased focus in the North Santiam region included a more aggressive pursuit of customers, more time at the customer site, and more time in the area than they may have spent otherwise.
    - Recommendation:

[1] Initially, Energy Trust planned a second group stakeholder discussion to be held in Q4 2017 that would focus on the savings methodologies deployed. This discussion was postponed, as Pacific Power commissioned the development of a kW calculation tool to estimate the feeder-level impacts of this pilot and similar efforts. This tool is currently nearing completion and will be reviewed to determine how well it can model feeder-level demand savings.

        - Consider increasing overall implementer budget so they can maintain the same level of effort in areas not targeted.
- Achieving incremental savings in the first year will be difficult unless significant lead time is provided to program implementers to design an implementation strategy.
    - Recommendations:
        - Consider providing quantitative savings targets specific to each program to help program implementers' gauge their success.
        - Provide specifics on the targeted region early in the year to give implementers enough time to develop a strategy specific to that region.
        - Support programs with coordinated marketing before they will be in the region speaking with customers.
        - Allow for minor adjustments to program processes that save time for the program implementer.
- The pilot did not require significant changes to implementers' program strategies, the measures they provide, or the communications they have with customers.
- Customers did not mention additional program marketing outside that provided by the program implementers.
    - Recommendations:
        - Time any general marketing to align with targeted marketing from program implementers.
- Interviewees indicated that in general they support targeted marketing efforts.
    - Recommendations:
        - Give additional consideration to supportive marketing strategies that assist program implementers who cater to a subset of the broader population. This may help them achieve greater savings in the targeted region.
        - Provide program implementers with targeted region specifics as soon as possible and even as early as the beginning of the year if there is a goal to acquire incremental savings in the first year.
        - Provide quantitative savings goals to each program implementer to help them gauge their success against the goal.

Navigant did not survey customers in the targeted area because customers were not made aware of the pilot and the services offered to them were the same as Energy Trust's statewide offerings. Navigant did interview three of Energy Trust's C&I program implementers to obtain feedback on their perceptions of the pilot (see full memo in Appendix 1).

Results

The implementation of the TLM pilot resulted in increased participation compared to baseline expectations due to increased outreach and marketing efforts in the targeted area. Compared to baseline expected peak demand reduction estimates, there were significant increases in winter and summer kW peak demand reductions in the targeted area during the pilot period. (See **Figure 1**).

Energy Trust calculated peak demand reduction estimates based on Northwest Power and Conservation Council load shapes and their associated peak factors for the seasonal peak time periods specified for the targeted area by Pacific Power. Energy Trust and Pacific Power

established a three-year baseline to compare pilot period results to what was expected to occur without the targeted efforts. The baseline was established by taking the monthly average energy savings of 2014-2016 Energy Trust projects, and includes a large project completed in December of 2016.

Originally, Energy Trust planned a second group stakeholder discussion to be held in Q4 2017 that would focus on the savings methodologies deployed and inform a formal impact evaluation. This discussion was postponed, as Pacific Power commissioned the development of a kW calculation tool to estimate the feeder-level impacts of this pilot and similar efforts. This tool is currently nearing completion and will be reviewed to determine how well it can model feeder-level demand savings. It is worth noting that industrial facilities can have a greater impact in a targeted area due to the size of the projects implemented. In this instance, two industrial sites implemented multiple energy efficiency measures, accounting for a large portion of the peak savings in the implementation period.

Figure 1. Summary of Pilot Implementation Period Project Counts and Peak Demand Reductions Versus Baseline (based on 2014-2016 averages)

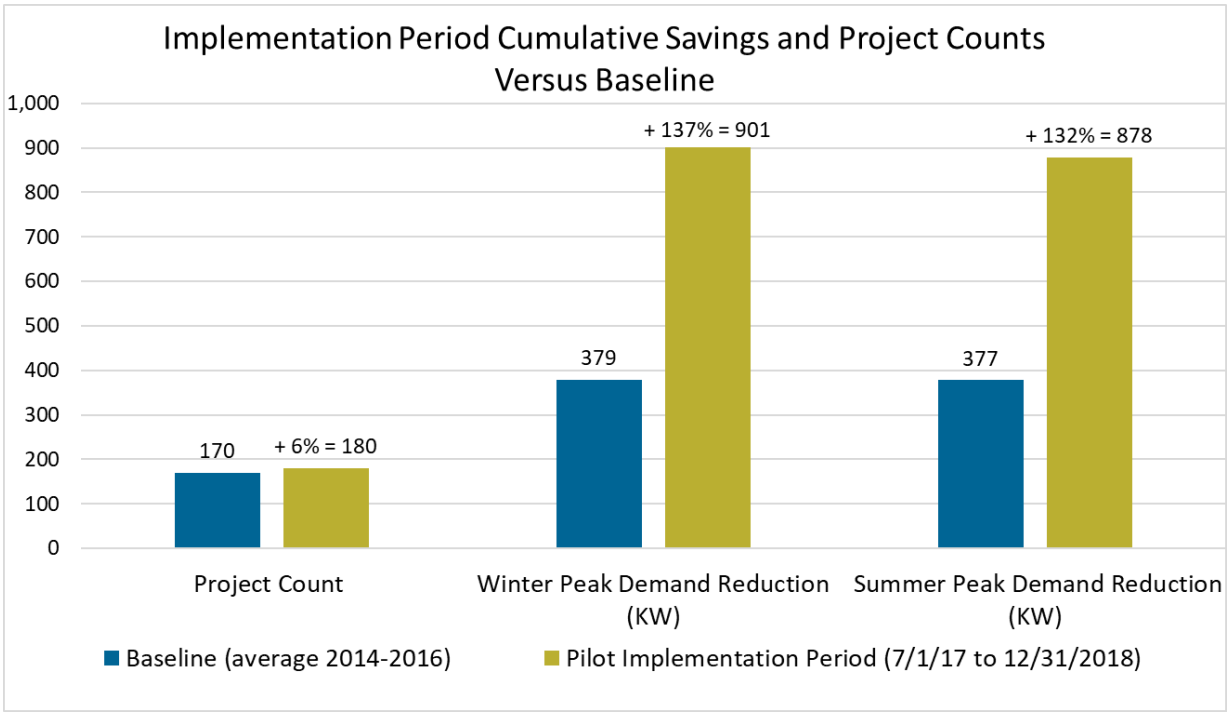
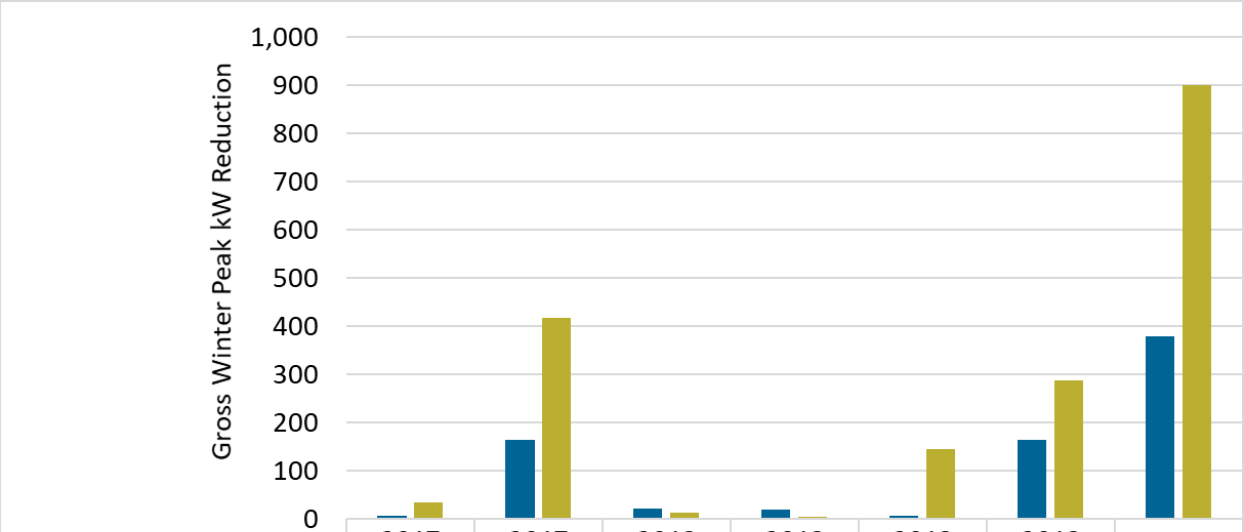


Figure 2 below illustrates estimated winter peak demand reduction from measures installed during the project period, compared to the baseline expected peak reduction. In total, Energy Trust activity in the targeted area is estimated to have reduced gross winter peak by 901 kW compared to 379 kW in the baseline period.

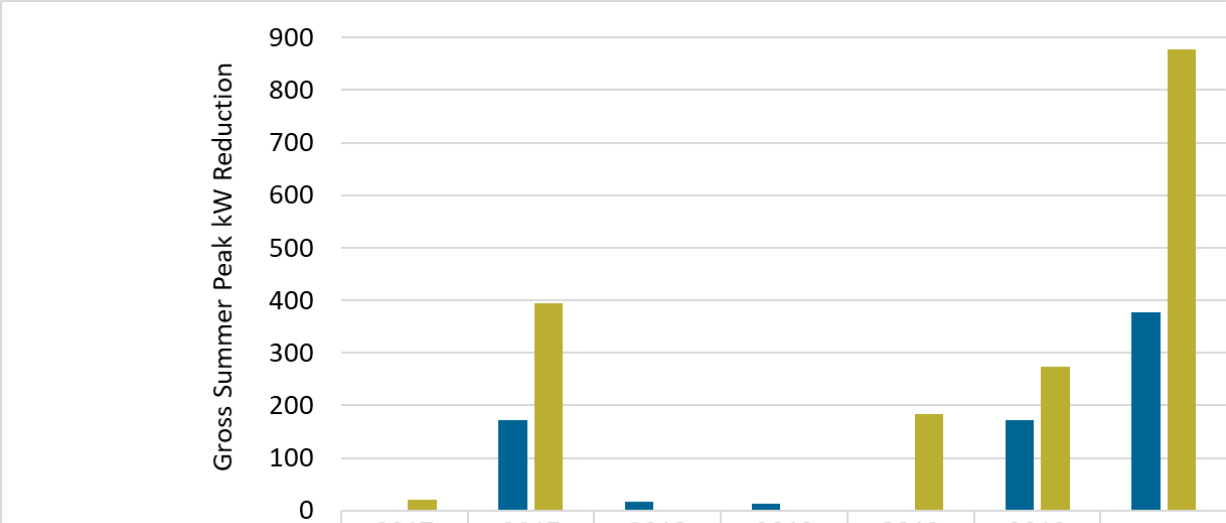
Figure 2. Gross Winter Peak kW Reduction Compared to Baseline



	2017 Q3	2017 Q4	2018 Q1	2018 Q2	2018 Q3	2018 Q4	Total
Baseline (2014-2016)	6	163	22	19	6	163	379
Implementation Period	35	418	12	3	145	288	901

Figure 3 below illustrates estimated summer peak demand reduction from measures installed during the project period, compared to the baseline expected reduction. In total, Energy Trust activity in the targeted area is estimated to have reduced gross summer peak by 878 kW compared to 377 kW in the baseline period.

Figure 3. Gross Summer Peak kW Reduction Compared to Baseline



	2017 Q3	2017 Q4	2018 Q1	2018 Q2	2018 Q3	2018 Q4	Total
Baseline (2014-2016)	2	171	18	14	2	171	377
Implementation Period	21	395	2	2	183	274	878

Figure 4 shows the average expected baseline savings and peak demand reduction in the targeted area, compared to the pilot period. This table demonstrates the "hockey stick" effect – a disproportionate increase in projects completing at the end of the year. This is a common trend for Energy Trust and energy efficiency programs nationwide.

There may be additional savings in 2019 that can be attributed to the project implementation period. We will track projects that close in the targeted area quarterly through Q4 2019.

Figure 4. Cumulative Savings and Project Counts Compared to Baseline

Baseline Expected Cumulative Gross Savings & Project Counts (based on 2014-2016 averages)					Pilot Implementation Period Cumulative Gross Savings & Project Counts				
Quarter	Annual Savings (kWh)	Summer Peak Demand Reduction (kW)	Winter Peak Demand Reduction (kW)	Project Count	Quarter	Annual Savings (kWh)	Summer Peak Demand Reduction (kW)	Winter Peak Demand Reduction (kW)	Project Count
Q3	18,448	2	6	23	2017 Q3	291,059	21	35	35
Q4	1,139,327	173	169	63	2017 Q4	2,894,611	416	452	79
Q1	1,284,247	191	191	79	2018 Q1	3,108,969	418	464	109
Q2	1,389,055	204	210	107	2018 Q2	3,126,808	420	468	123
Q3	1,407,503	206	216	130	2018 Q3	4,254,051	604	612	138
Q4	2,528,382	377	379	170	2018 Q4	6,451,932	878	901	180
Cumulative Total	**2,528,382**	**377**	**379**	**170**	Cumulative Total	**6,451,932**	**878**	**901**	**180**
Total Cumulative Savings and Project Count above Baseline							**500**	**521**	**10**

Figure 5 shows the savings and demand reductions in the targeted area, during the pilot project period calculated with Pacific Power's newly developed Distributed Energy Resource (DER) Impact Tool and load shapes.

Figure 5. Pacific Power Calculated Savings as realized through the DER Impact Tool

Sector	End Use	Annual kWh	Summer kW	Winter kW	Measures	Incentives
Residential	HVAC	*99,071*	*7.2*	*16.9*	*49*	*$37,281*
Residential	Water Heating	*32,959*	*3.3*	*6.0*	*223*	*$1,336*
Residential	Lighting	*9,636*	*1.1*	*1.3*	*102*	*$3,317*
Residential	Miscellaneous	*468,822*	*78.2*	*62.4*	*12*	*$3,878*
Commercial	HVAC	*0*	*0.0*	*0.0*	*0*	*$0*
Commercial	Water Heating	*0*	*0.0*	*0.0*	*0*	*$0*
Commercial	Lighting	*2,984,616*	*404.9*	*409.2*	*91*	*$508,261*
Commercial	Cooking	*0*	*0.0*	*0.0*	*0*	*$0*
Commercial	Refrigeration	*1,259,439*	*272.5*	*127.8*	*15*	*$297,706*
Commercial	Miscellaneous	*0*	*0.0*	*0.0*	*0*	*$0*
Industrial	Miscellaneous	*1,597,389*	*179.4*	*199.1*	*23*	*$96,736*
Irrigation	Miscellaneous	*0*	*0.0*	*0.0*	*0*	*$0*
All	All	*6,451,932*	*946.6*	*822.8*	*515*	*$948,515*

Marketing findings

Energy Trust ran an A/B test of co-branded advertising in July of 2017. A/B testing for digital advertising will display two different ads at random and measure the click-through rate of each ad. This A/B test ran two different ads during the same period of time, in the targeted area, to see if click-through rates were different for single brand advertising, as opposed to co-branded advertising. The test only yielded around 200 clicks, which is a relatively small test. However, it did show a slightly higher click-through rate for ads co-branded with both Energy Trust and Pacific Power logos. Energy Trust will continue to test and employ co-branded marketing in channels that allow for strict targeting, such as digital advertising and direct mail and email. Because Energy Trust offers both gas and electric incentives in dual-fuel territory, it is important that we not exclusively represent one utility over another in advertising.

Because the geographic tracking in Google Analytics only shows larger communities, we were unable to find specific data on click-through rates in the targeted area. Based on this finding, we are using specific codes for ads delivered to the Medford TLM pilot area, as well as a "control group" area, so that we can determine what impact, if any, increased digital advertising impressions have on click-through rate.

Lessons Learned

Some of the major learnings identified during the Navigant interviews and the teams were:

- There is a need to document staff hours required to design and deploy the pilot project including marketing.
- Outreach and marketing accelerated participation and exceeded the expectations of the teams.
- During the initial program design, marketing was not integrated into the process. Bringing marketing into the discussion earlier could have helped to identify the businesses and customers and could have assisted in understanding marketing challenges earlier in the process.
- A common vocabulary would help improve coordination between PacifiCorp and Energy Trust.
- The constraint on each feeder line may be different, so a menu of options is needed to streamline the process of implementing future TLM efforts.
- Having better demographic and characteristic information about the targeted area's customers earlier in the project would have helped program teams in honing the offerings and setting achievable goals.

Suggested Process Improvements

- Test key messages in the market. Allow for more time to study the area and conduct such testing.
- Deploy Industrial Program Delivery Contractors (PDCs) more quickly for scoping measure potential in locations where local loads are primarily driven by larger industrial companies.
- Allow additional planning time to ensure the ability to analyze utility consumption data or AMI data to define more targeted offerings to specific customer segments.
- Consider the new program offerings that Energy Trust is investigating as pilots and identify how new offerings could be integrated into the targeted load management pilots.
- Retro-commissioning could be considered for industrial customers.
- Project team should plan and align direct mail strategies with residential program. Delays occurred due to a strategy change with Energy Saver Kits.
- Investigate strategies to expand the trade ally base in the targeted location and look at opportunities to create a more engaged group of service providers.
- Explore pilot measure offerings that can better target summer peak (e.g., efficient residential cooling equipment).
- Look at project forecast (pipeline) when estimating potential.
- Track projects that complete post-implementation period for one year via quarterly data pulls to better gauge lasting effects of targeted efforts.
- If available, market energy efficiency measures that can be used in demand response programs.

Appendix 1

Program Implementer Interviews

To: Phil Degens, Energy Trust of Oregon

From: Ariel Esposito and Nicole DelSasso, Navigant

CC: Steve Lacey, Andy Eiden; Energy Trust
Omar Dickenson, Shawn Chandler, Frank Stern; Navigant

Date: June 1st, 2018

Re: North Santiam Targeted Community Pilot Evaluation: Program Implementer Interview Summary Memo

Navigant conducted three interviews in April and May of 2018 of program implementers that participated in the North Santiam Targeted Community Pilot. This memo summarizes the interviews and the main recommendations for a future pilot project. The summary of the interviews is split into four sections to cover the four interview research objectives identified in **Table 1**.

Table 1. Research Objectives

Research Topic	Objective
Roles and Responsibilities	Understand interviewee's role and identify key staff
Pilot Goals, Objectives, and Structure	Document the pilot goals, detailed objectives and operational structure
Pilot Implementation	Understand the results of the pilot to date
Closing	Identify potential improvements for current or future pilot

Energy Trust and Pacific Power reviewed and approved the interview guide included in the **Appendix.** Interviewees were asked eighteen questions that covered the four research topics identified in **Table 1**. Interviewees included both program managers and account managers for programs that target either industrial customers or small business customers. **Table 2** lists the organization and program for each contact.

Table 2. Program Implementers Interviewed

Organization	Program	Contact
Energy350	Production Efficiency	Lisa Green
Energy350	Production Efficiency	Chris Smith
SmartWatt	Small Business Direct Install	Tim Telfer

Both Lisa Green and Chris Smith from Energy350 communicate directly with Energy Trust. Tim Telfer at SmartWatt received all direction on the pilot from ICF's existing buildings commercial energy efficiency program manager.

Roles and Responsibilities

Overall, interviewees indicated that their primary role within their organizations did not change for the pilot. All the interviewees were currently implementing the programs before the pilot began and marketing the program to specific customer segments. With the pilot program launch, the main change to their roles was increasing their focus on customers in the North Santiam region. The increased focus in the North Santiam region included a more aggressive pursuit of customers, more time at the customer site, and more time in the area than they may have spent otherwise. Without the pilot, the interviewees indicated they would have spent less time in the region. This was for a variety of reasons including that it is a small area, it is rural, and they tend to focus program marketing on the higher density urban areas. Program implementers did not hire additional staff to support pilot needs. However, the additional effort did require resource reallocation and reduced the staff's time spent on other areas. To maintain the same level of focus on other areas while implementing the pilot, additional staff would have been required.

Key takeaways:

- ***Program implementers are accustomed to targeting customers and therefore did not need to change roles or responsibilities to be able to geographically target the same customer segments.***

Recommendations:

- ***Consider increasing overall budget so that implementers can maintain level of effort in areas not targeted.***

Pilot Goals, Objectives and Structure

All interviewees indicated that Energy Trust or ICF set a qualitative goal for them to reduce peak demand in the geotargeted region while staying within their budget and meeting their region-wide targets. Interviewees also indicated they were successful in marketing to every business within their sector in the North Santiam region even if the marketing did not lead to participation and incremental savings.

None of the interviewees indicated that Energy Trust or ICF set quantitative savings goals to track the pilot's success. Also, none of the interviewees indicated that they set quantitative goals for themselves. Some interviewees indicated that a quantitative savings goal would have helped them gauge their success.

Some of the interviewees felt that their work on the pilot to date had been a success and that additional savings in the region have or will be acquired that would not have been acquired without their increased targeting of the area. These interviewees are expecting incremental savings in the second year of the pilot, but note limited success the first year. Other interviewees indicated that they did not feel the pilot had been a success and said that lack of success was driven by the timing of the information they received from Energy Trust or ICF on the specifics of the pilot and the characteristics of the region. While they were told there would be a geotargeted pilot in the spring of 2017, it was not until the third quarter of 2017 when

Energy Trust or ICF disclosed the region they would be asked to target. Industrial or small business program marketing already targets a smaller customer segment, and their program strategy is dependent on the specifics of the area they are targeting. Some of the interviewees indicated that their program strategy would have been significantly different and potentially more successful if they had been told which region to target earlier in the year -January or February of 2017.

In addition to timing, some interviewees indicated that marketing support before they started targeting the region may have helped them achieve incremental savings. Some interviewees recommended targeted mailers sent to the customers before the implementers would be in the area. These mailers could inform customers about the program and provide them with the schedule and a phone number to call for more information. All interviewees acknowledged that one of the challenges they face with all customers is determining the appropriate person at the site to speak with about the program offerings. This continued to be an issue for the North Santiam region when implementers did not have a contact for the site.

No external factors such as distance to travel to the region or inclement weather were referenced as reasons that limited the success of the pilot. This indicates that there may be opportunities for future pilots to increase savings by providing the program implementers specific information on the pilot at the beginning of the year, and supporting implementers with additional marketing.

Key takeaways:

- ***Achieving incremental savings in the first year will be difficult unless significant lead time is provided to program implementers to design an implementation strategy.***

Recommendations:

- ***Consider providing quantitative savings targets specific to each program to help program implementer's gauge their success.***
- ***Provide specifics on the targeted region early in the year to give the implementers enough time to develop a strategy specific to that region.***
- ***Support programs with coordinated marketing before they will be in the region speaking with customers.***

Pilot Implementation

While interviewees indicated that they made no significant changes to their implementation strategy because of the pilot, they did make small adjustments to their processes to be more successful. For example, estimating savings for a typical project can be completed either in-house by Energy350 or by an outside contractor previously approved by Energy Trust. One interviewee mentioned that for all pilot projects, the program implementer requested that Energy Trust allow them to use in-house resources for all the projects. Energy Trust accepted this request and this allowed the program implementer to save time and decrease customer fatigue by combining site visits for multiple projects and logging data for different projects concurrently. The interviewee recommended that similar decisions be made for any future targeted pilots to reduce customer burden and allow for more projects to take place at the same time.

In terms of communication with potential customers about the pilot, none of the interviewees indicated that they specifically addressed the pilot with the customers. Also, the interviewees did not recall any customers mentioning marketing materials that they had seen before speaking with the program implementer. Energy Trust's general marketing activities may not have registered with customers for two reasons: First, the timing of the general marketing was later in the year than when program implementers were on site. Second, the interviewees were working with specific customer segments that were not specifically targeted by the general marketing campaign.

Some interviewees mentioned that the customers did appreciate the additional time spent with them and the extra resources provided to them. Additionally, some customers indicated they were experiencing power quality issues due to the load growth in the region. This may have made them more likely to participate in the program since they were already working to address those issues.

The interviewees mentioned that they did not limit their focus to measures that would reduce peak demand savings, but included all their usual measures such as outdoor lighting in their discussions with the potential customer.

Key takeaways:

- ***The pilot did not require significant changes to implementers' program strategies, the measures they provide, or the communications they have with customers.***
- ***Customers did not mention additional program marketing outside that provided by the program implementers.***

Recommendations:

- ***Allow for minor adjustments to program processes that save time for the program implementer.***
- ***Time any general marketing to align with targeted marketing from program implementers.***

Potential Areas for Improvement

The last section of the interview asked for thoughts on potential areas for improvement if Energy Trust were to implement a similar pilot at a later point. The recommendations provided by program implementers can be split into three areas: program support, improved communication, and increased incentives:

Program support: Some interviewees indicated they felt they had limited support from Energy Trust, others stated they felt fully supported by Energy Trust. Those that indicated they felt fully supported did not mention many supportive items or actions related specifically to the pilot beyond receiving more frequent communications during monthly pilot check-in meetings.

Improved communication: Many of the questions during the interview touched on the issue of timing of Energy Trust and ICF's communications and type of communications the program implementer received about pilot specifics. Some interviewees responded that if they had learned earlier in the year that the pilot would take place in the North Santiam region, they may have been able to achieve more incremental savings. Others indicated that the pilot needed to last at least two years since it was difficult to achieve savings in the first year.

Increased incentives: One interviewee recommended providing customers in the targeted region with higher incentives to participate in the program. The interviewee felt that higher incentives would have led to more incremental savings and are justified because additional savings in the targeted region would help offset expensive distribution and transmission upgrades needed for that region.

Key takeaways:

- ***The feedback provided by the interviewees on potential areas for improvement included items related to program support, communication, and incentives.***
- ***Interviewees indicated that in general they support targeted marketing efforts.***

Recommendations:

- ***Give additional consideration to supportive marketing strategies that assist program implementers that cater to a subset of the broader population. This may help them achieve greater savings in the targeted region.***
- ***Provide program implementers with targeted region specifics as soon as possible and even as early as the beginning of the year if there is a goal to acquire incremental savings in the first year.***
- ***Provide quantitative savings goals to each program implementer to help them gauge their success against the goal.***

Overall, the interviewees indicated that they support geographically targeted marketing efforts and would participate in future programs like this. While there are some areas for improvement, identifying these areas for improvement is one of the main benefits of running this pilot program.

Appendix 1a. Program Implementer Interview Guide

To: Phil Degens, Energy Trust of Oregon

From: Ariel Esposito and Nicole DelSasso, Navigant

CC: Kate Hawley, Andy Eiden; Energy Trust
Omar Dickenson, Shawn Chandler, Frank Stern; Navigant

Date: April 18, 2018

Re: North Santiam Targeted Community Pilot Evaluation: Program Implementer Interview Guide FINAL

Navigant will interview three program implementers that participated in the North Santiam Targeted Community Pilot. **Error! Reference source not found.** identifies the interview research objectives.

Table 3. Research Objectives

Research Topic	Objective	Question Numbers
Roles and Responsibilities	Understand interviewee's role and identify key staff	Q1 – Q5
Pilot Goals, Objectives, and Structure	Document the pilot goals, detailed objectives and operational structure	Q6 – Q9
Pilot Implementation	Understand the results of the pilot to date	Q10 – Q16
Closing	Identify potential improvements for current or future pilot	Q17 – Q18

Name of Interviewee: _____
Title/Company: _____
Date: _____

[INTRO SCRIPT] Thank you for your time today. The primary goal of this discussion is to help me understand your thoughts on the Targeted Community Pilot implemented by Energy Trust and PacifiCorp in the North Santiam Canyon region for improvement if this program were to be implemented again in another region. The time period we are interested in your feedback on includes the targeted pilot planning between Fall 2016 and June 2017 and implementation starting June 2017 through the present.

Just a reminder that I am recording this call so I can focus on the discussion, rather than notetaking. I will not share this recording beyond the program team and will only use it to clarify my notes after the call.

Before we begin, do you have any questions for me? [If any questions come up, document them here:]

Q1.

A1.

Roles and Responsibilities

1. What does your day-to-day role look like in relation to the pilot project? [Probe for main responsibilities, and length of time with program. What sort of activities do you complete on a day-to-day basis related to the program?]
2. How did you participate in the pilot? [Types of measures offered, outreach and marketing?]
3. Who are the key staff involved in the pilot's implementation? [Probe for an understanding of each person's role. Ask if there may be a document that outlines roles and responsibilities of staff members which may save time.]
4. Were additional staff resources required for implementation of this pilot?
5. Do you have an estimate of how many hours of your time or your team's time this project required?

Pilot Goals, Objectives, and Structure

6. What are your overall impressions of the Targeted Community Pilot? [Was it successful, not successful?]
7. Did you set any goals for the pilot? [i.e. amount of customers engaged, increased focus on specific equipment, internal competitions to motivate team to engage more customers, also cover any other qualitative measure outside of energy savings goals.]
    a. What were they?
    b. How successful was the pilot in achieving these goals? What worked and what didn't work (ask about each individual goal)?
    c. What challenges were there in achieving these goals? How are you addressing them?

d. Were there any market barriers or external factors beyond your control that affected the pilot's ability to achieve the goals? [Probe for weather, financing or economic issues, policies, lack of time to ramp up etc.]

8. Do you feel that the pilot communications from Energy Trust have been sufficient? Did you have a clear understanding of the pilot and what it hoped to achieve?

9. Do you think the quick implementation timelines dictated at the beginning of by the pilot were sufficient? What about the two-year implementation plan? In each case, would more information or longer timelines have helped you achieve your goals?

Pilot Implementation

10. Moving now to pilot implementation, we have a few questions related to communication of the pilot initiative to customers:
    a. Did you specifically address with customers the reason why the targeted pilot project was being implemented?
    b. When identifying opportunities with the customer, did you consider the peak period influence of the EE measures considered?

11. Because of the targeted outreach, do you think some projects participated sooner than would have otherwise?

12. Do you think more savings were achieved than would have been realized without the pilot?

13. How do you feel about the timing and length of the pilot? [Should it be longer or shorter?]

14. Do you think that the marketing that was done was effective in driving new projects and informative to customers?

15. How did customers receive the increased marketing efforts due to the pilot? [Were they happy to have you there? Did they know about the pilot before you got there?]

16. Did you get the support you needed from ETO and PAC?

Closing

17. What do you think could be done to improve the current pilot? [increase savings, reduce costs]
    a. What about changes to improve a future pilot?

18. Is there anything that we haven't talk about that you would like to add?

Thank you very much for taking the time to talk with me. Your contribution is a very important part of the process.