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2018 Customer Communication and Outreach Report to the Energy Trust

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May 15, 2019

VIA ELECTRONIC FILING

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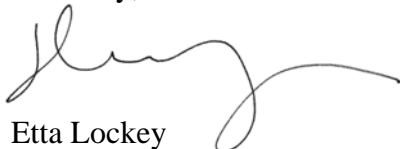
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RE: 2018 Customer Communication and Outreach Report to the Energy Trust of Oregon

Enclosed for filing by PacifiCorp d/b/a Pacific Power is the 2018 Customer Communication and Outreach Report to the Energy Trust of Oregon. This report is submitted to the Public Utility Commission of Oregon at the request of Commission staff.

Please direct any informal inquiries to Cathie Allen, Manager, Regulatory Affairs, at (503) 813-5934

Sincerely,



Etta Lockey
Vice President, Regulation

Enclosure

cc: Elaine Prause (Elaine.prause@state.or.us)

2018 Pacific Power Commercial and Residential SB 838 Work

Introduction

Through passage of Senate Bill 838 (2007), the legislature created a funding mechanism for additional cost-effective energy conservation measures beyond what is attainable through Oregon's existing public purpose funding. SB 838 allows the Public Utility Commission to authorize electric companies to "include in its rates the costs of funding or implementing cost-effective energy conservation measures." (ORS 757.689) Rather than developing distinct programs, Pacific Power recognized the value Energy Trust of Oregon had already established in the market and concluded that customer confusion would be minimized if SB 838 funds were used to enhance these established programs. Pacific Power executed an agreement with Energy Trust and beginning January 25, 2008, began providing a majority of SB 838 funds to Energy Trust. Remaining SB 838 funds are retained by Pacific Power to promote Energy Trust programs to customers. This document provides a summary of activities for those retained funds and is the sixth annual report.

Communications and Outreach Approach

With more than 100 years of service, Pacific Power has strong awareness among our customers and they look to their electric utility to educate them on managing their energy use and providing them with energy efficiency resources. Pacific Power utilizes the retained SB 838 funds to connect with our customers, engage them on the value of energy efficiency, and direct them to Energy Trust programs. Through the use of SB 838 funds, the company is focused on having a consistent dialogue with our customers, so they know where to find these programs when they need them, and understand the context of how these programs benefit all customers receiving service from Pacific Power.

Pacific Power is focused primarily on educating customers outside of the Portland area on Energy Trust programs and incentives. The SB 838 funds allow Pacific Power to reach a broad geographic range of customers under a trusted and recognizable brand name to help ensure that all of our customers are aware of opportunities available from Energy Trust. In 2018, 78% of Pacific Power residential customers in Oregon are aware that Pacific Power offers solutions to help customers use energy more efficiently.

While the communications program is broad, the outreach component of Pacific Power's plan is direct and allows the utility to foster conversations with small and mid-size business customers about Energy Trust programs.

Collaborative Process and Planning

The communications plan is a collaborative effort between Pacific Power and Energy Trust, and considers additional communications and outreach efforts as they arise. After final budget determination by Energy Trust, Pacific Power's team provides an annual communications and outreach plan to Energy Trust each fall outlining objectives, strategies, messages and media plan for the upcoming year. A calendar is set based on seasonally optimal periods for communications for both Pacific Power customers and Energy Trust. Pacific Power provides an SB 838 Communications & Outreach Plan, as well as a media flowchart. Pacific Power also incorporates requests for energy efficiency program promotional support from Energy Trust, outside of the SB 838 budget. These requests are primarily specific program offers and promotions, and are accommodated within the overall Pacific Power customer communications plan to help build a larger conversation on energy efficiency programs with Oregon customers.

Pacific Power and Energy Trust communications teams meet regularly throughout the year to review upcoming activities and make any necessary adjustments. Communications staffs meet as needed and confer by phone and email on work in progress and new developments between regular collaboration meetings.

Communication Objective

- Increase overall awareness of and regional participation in Energy Trust incentive programs and services by Pacific Power residential and small /mid-size business customers.

Communication Strategies

- Focus communications primarily in Southern and Central Oregon to reach concentrated and highly populated markets in Pacific Power territory; continue to increase awareness in other parts of the state as budget allows.
- Use a variety of cost-efficient, high-impact media channels to reach customers, including TV, radio, print, outdoor, digital display, social media, direct mail and sponsorships.
- Create an advertising campaign to complement other customer communications efforts planned in Oregon (from separate Energy Trust or Pacific Power budgets) such as bill inserts, residential and business newsletter stories, and direct mail.
- Reach customers during seasonally-optimal periods, when they are thinking about energy efficiency measures the most.
- Tie in Energy Trust's programs with the company's general energy efficiency call to action to be **wattsmart**.
- Focus outreach to rural Oregon service area by calling on small- and mid-size commercial customers to help customers make the business case for identified retrofits and other energy-saving measures.
- Utilize existing community and customer relationships through regional business managers (RBMs).
- Collaborate with Energy Trust to develop marketing in targeted geographic areas.

Key message

You have the power to save energy and money through programs available through Energy Trust is the key message. "Being **wattsmart** is good for Oregon, and your wallet." "With simple **wattsmart** steps you can make a big difference for Oregon and the environment. Both now and into the future."

Communications and Outreach Activities

See Appendix A for activity details

Communication Tactic	Description	2018 Results / Impressions / Approximate Quantities
SB 838-funded communications and outreach activities		
TV, radio, print and outdoor advertising	<ul style="list-style-type: none"> Starting in April, ran TV, radio, print and outdoor advertising. Placed outdoor posters in certain markets. Focus of the campaign is energy efficiency with specific references to Energy Trust incentives, Energy Saver Kits and efficient lighting as well as lighting options for business customers. Ads refer customers to bewattsmart.com (Pacific Power page with clear links to Energy Trust) and to Energy Trust's toll-free phone number. Television ads targeting business customers are co-branded with Energy Trust and Pacific Power and direct customers to energytrust.org/mybusiness. 	Impressions: TV/Cable 3,375,236 Radio 1,150,000 Print 449,330 Digital 5,664,278 Social 53,594 Search 11,009 Outdoor 30,997,400 <u>Sponsorship 7,159,708</u> TOTAL 49,579,371
Business print ads	Placement examples include: Cascade Business Book of lists, Cascade Business News and Bend Chamber Business Journal. Ads refer customers to Energy Trust's phone number and bewattsmart.com .	
Trail Blazers radio sponsorship	Spots run during radio broadcasts of pre-game show, play-by-play per game and post-game show.	
Oregon State University Women's Basketball sponsorship	Spots run in each regular season broadcast and post-game radio feature, one live mention in each game; LED signage in rotation	
Digital advertising	Banner ads on local media sites, blogs, behavioral ad targeting and pay-per-click ad placements.	
Workshops and Events	<ul style="list-style-type: none"> Workshops and other events were held in 13 communities throughout the state in 2018. Promotional support for events included direct mail, email, print, flyers, social media and community outreach. 	Email 11,175 Print mail 28,505
Pacific Power-funded communications and outreach activities		
<i>Connect</i> residential customer newsletter	Energy efficiency and Energy Trust programs mentioned in Pacific Power newsletter sent in bills and through email. Newsletter content developed collaboratively with Energy Trust.	1.3 million inserts 533,000 emails
New customer mailings	Mailings to new customers mention Energy Trust services and incentives, as well as the data transfer.	45,000 mailings
Small business lighting	Mailings to targeted customers in Lincoln City and the Willamette Valley	3,720 mailings

Web	<ul style="list-style-type: none"> • pacificpower.net/wattsmart, and promotional URL bewattsmart.com link directly to Energy Trust’s website. • Energy efficiency messages on the Pacific Power homepage throughout the year. 	51,044 page views
Twitter @PacificPower_OR	Tweets several times per week, some promote energy efficiency and Energy Trust incentives/services.	3,995 followers
Facebook	Information and tips posted three times or more per week. Ongoing campaign to increase the number of individuals and businesses we communicate with via Facebook.	21,186 fans
Energy Trust-funded communications and outreach activities with Pacific Power		
Bill inserts in Pacific Power bills	Two to three inserts per year to promote Energy Trust residential incentives/services, smart thermostats and local workshops; inserts also posted online for customers who receive paperless billing.	680,000 inserts

Commercial and Residential Outreach

Pacific Power uses field energy consultants to provide updated information on Energy Trust incentives, tax credits, grants and other resources available for small to mid-size commercial and residential energy efficiency projects in Oregon. As directed by Pacific Power, the field energy consultants present and coordinate multiple events throughout Oregon. Additional follow-up is provided to all responsive attendees to ensure smooth flow of relevant energy efficiency information. All attendees receive assistance, if desired, reviewing possible energy-saving opportunities for their business, referrals to applicable Energy Trust programs and assistance with all other opportunities for project funding.

Pacific Power hosted and participated in multiple energy efficiency focused meetings with residential, business and community leaders across the state utilizing existing relationships with local Chambers of Commerce and economic development groups. These presentations focused on residential and small- to mid-size commercial customers and how they can improve energy efficiency. Energy efficiency presentations and event participation occurred in Bend, Central Point, Coos Bay (2), Grants Pass (3), Hood River (2), Jacksonville, Klamath Falls (2), Lebanon, Madras, Portland (2), Prineville, Roseburg (3) and Talent, Oregon. The presentations highlighted Pacific Power’s relationship with Energy Trust and available programs and incentives to save energy and money.

Workshops

Pacific Power produced and delivered another successful round of Be **watt**smart Workshops. The workshops were targeted to residential and small- to mid-size commercial customers to educate them on how to manage energy use and improve energy efficiency.

Customer Participation

Locations	Chambers of Commerce, business / community groups / conferences	Be <i>watt</i> smart / Pacific Power events	2018 Total
Bend	150		150
Central Point		100	100
Coos Bay		214	214
Grants Pass		786	786
Hood River	11,200*		11,200
Jacksonville		150	150
Klamath Falls	900		900
Lebanon		81	81
Madras	225		225
Portland	7,750*		7,750
Prineville	175		175
Roseburg	105	115	220
Talent	2,500*		2,500
TOTAL	23,005	1,446	24,451

Hood River Harvest Festival, Talent Harvest Festival, and Portland Movies/Concerts in the Park sponsorships

Energy Trust Liaison

Pacific Power has had a dedicated position in place since June 2008 to provide program support to Energy Trust and oversight to the retained SB 838 communications and outreach funds. Additionally, the liaison role oversees Pacific Power's field energy consultants, outreach activities, coordinates with Pacific Power's regional business managers, participates in Energy Trust communications and program collaboration meetings, coordinates on-bill repayment activities through EEAST and other programs, coordinates utility data transfers, develops regular and ad hoc data, activity and financial reporting, and supports other projects as they arise, such as energy performance reporting and community generated activities.

Other Energy Efficiency Coordination / Support

- Internal Pacific Power support for Energy Trust programs
- Weekly / Monthly / Quarterly Energy Trust coordination meetings
- Energy Trust Conservation and Renewables Advisory Councils
- On-Bill Financing support
- 1aMW / Self Direct reconciliation

Outcomes: Equitable regional participation – unique sites served

Utilizing data received from Energy Trust through the improved data transfer process, results indicate that Pacific Power’s primary communications and outreach target areas continue to see steady numbers in the amount of unique sites served and qualified measures installed proportionate to customer density.

Pacific Power regions are identified in Appendix B

Unique Sites Served by Region	Customer Distribution		2007 (pre SB 838)	2016	2017	2018
Central Oregon	78,992	13.85%	12.78%	16.80%	23.51%	20.60%
Coos Bay	25,350	4.36%	3.54%	3.71%	2.94%	3.73%
Enterprise	5,251	0.90%	0.17%	0.54%	0.94%	0.65%
Grants Pass	48,038	8.26%	7.47%	8.97%	6.22%	6.89%
Hood River	9,086	1.56%	1.78%	1.30%	1.63%	1.48%
Klamath Falls	37,962	6.53%	4.60%	5.58%	3.95%	3.24%
Lincoln City	11,849	2.04%	1.14%	1.18%	1.00%	1.13%
Medford	86,132	14.81%	14.63%	15.26%	14.27%	14.74%
Pendleton	18,879	3.25%	4.04%	1.91%	1.78%	1.95%
Portland	80,185	13.79%	17.07%	14.52%	15.66%	16.66%
Roseburg	41,414	7.12%	7.35%	6.27%	7.20%	7.26%
Warrenton	24,120	4.15%	2.15%	2.63%	1.85%	1.71%
Willamette Valley	114,379	19.97%	23.27%	21.34%	19.05%	19.95%

Conclusion and Opportunities

Regional Participation: As determined from Energy Trust data, customer participation in Pacific Power’s regions has remained stable, with a significant increase in central Oregon. Compared to customer density, additional focus opportunities remain in “hard to reach” areas of eastern and northwest Oregon.

Program Support: Pacific Power’s main communications and outreach focus has been to increase awareness of and regional participation in Energy Trust incentive programs and services for residential and small/mid-size businesses. As Energy Trust continues to increase focus on attracting and serving new, small, remote and more diverse customers, Pacific Power is looking forward to providing support to Energy Trust’s Diversity, Equity and Inclusion strategy.

APPENDIX A: 2018 Year End Activities Report for Energy Trust

Pacific Power utilized several approaches to support and deliver energy efficiency communications, advertising and outreach to residential and small- and mid-size commercial customers.¹

In the media (Below are specific Pacific Power advertising campaign titles)

TV

- Being **wattsmart** is **Good** for Oregon
- My Business TV

Radio

- Being **wattsmart** helps Oregon **Thrive** radio :60 and :30
- We can all make Oregon better, **wattsmart** tips :30

Print

- You have the power to save energy and money – summer cooling
- Being **wattsmart** is Good – Central Oregon
- Being **wattsmart** is Good – Grants Pass
- Being **wattsmart** is Good – Coast
- Being **wattsmart** is Good – North Santiam
- Being **wattsmart** Helps – North Santiam
- Be **wattsmart** workshops – Lebanon, Jacksonville, Coos Bay, Grants Pass, Roseburg

Outdoor

- Energy Efficiency is Good for Oregon – Waterfall
- Energy Efficiency is Good for Oregon – Central Oregon

In customer bills

Connect residential newsletter and e-newsletter

- I love (heart) **wattsmart** – A quick savings guide
- Get Cozy with a heat pump
- Save with a new showerhead
- Cool moves for saving energy
- EPS spells savings
- Use less. Save more.
- Get a jump on winter savings

Bill inserts

- Incentives to keep your home shining brighter this year.
- I have the power to control comfort – smart thermostat

Outbound Envelope

- Resolve to save energy in 2018
- Powering your choices (savings and cash back)

¹ Some activities are funded outside of SB 838 funds.

In the mail**Direct mail**

- New Business Letter
- New Business Brochure
- New Business Rights and Responsibilities Summary / Energy Trust
- New Residential Welcome Consumer Information Summary / Energy Trust
- New Residential Welcome Aboard Brochure
- Energy efficiency Be **watt**smart workshop announcements
- Small Business Direct Install – letter and flyer

On the web**Email**

- Energy efficiency workshop announcements

Online Media

- Cooling smart thermostat at 78 degrees - Facebook & Digital
- Cooling ceiling fan – Facebook & Digital
- Being **watt**smart is good for the environment and for your wallet
- Being **watt**smart helps Oregon's environment, helps save energy and money.

Websites / Social Media (continuous energy efficiency and Energy Trust content)

- pacificpower.net/wattsmart
- bewattsmart.com
- Pacific Power Facebook page
- Twitter

Support materials**Fact Sheets, Flyers, Brochures and More**

- Winter **watt**smart handout – Oregon / Energy Trust
- Residential energy efficiency brochure
- I have the power to be wattsmart brochure
- Partners in Innovation – business brochure
- Be **watt**smart workshops flyers and signage

APPENDIX B: Pacific Power Oregon Regions

Central Oregon

Bend	Culver	Metolius	Prineville	Terrebonne
Crooked River Ranch	Madras	Powell Butte	Redmond	Warm Springs

Coos Bay

Bandon	Charleston	Coquille	Myrtle Point	Norway
Broadbent	Coos Bay	Gaylord	North Bend	Powers

Enterprise

Enterprise	Imnaha	Joseph	Lostine	Wallowa
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Grants Pass

Azalea	Grants Pass	O Brien	Sunny Valley	Wolf Creek
Cave Junction	Kerby	Rogue River	Wilderville	
Glendale	Merlin	Selma	Williams	

Hood River

Grass Valley	Kent	Mosier	Rufus	Wasco
Hood River	Moro	Parkdale	The Dalles	

Klamath Falls

Beatty	Chiloquin	Fort Klamath	Lakeview	Midland
Bly	Crater Lake	Keno	Malin	New Pine Creek
Bonanza	Dairy	Klamath Falls	Merrill	Sprague River

Lincoln City

Gleneden Beach	Grand Ronde Lincoln City	Neotsu Otis	Rose Lodge	
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Medford

Applegate	Central Point	Jacksonville	Prospect	Trail
Ashland	Eagle Point	Medford	Shady Cove	White City
Butte Falls	Gold Hill	Phoenix	Talent	

Pendleton

Adams	Echo	McNary	Pendleton	Stanfield
Arlington	Helix	Milton	Pilot Rock	Umatilla
Athena	Hermiston	Freewater	Rieth	Weston
Boardman				

Portland

Maywood Park	Portland			
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Roseburg

Canyonville	Glide	Oakland	Sutherlin	Wilbur
Days Creek	Idleyld Park	Riddle	Tiller	Winchester
Diamond Lake	Myrtle Creek	Roseburg	Umpqua	Winston
Dillard				

Warrenton

Arch Cape	Cannon Beach	Gearhart	Seaside	Warrenton
Astoria	Clatskanie	Hammond	Tolovana Park	

Willamette Valley

Albany	Crawfordsville	Harrisburg	Mill City	Shedd
Aumsville	Creswell	Independence	Millersburg	Stayton
Brownsville	Dallas	Jefferson	Monmouth	Sublimity
Cascadia	Eugene	Junction City	Monroe	Sweet Home
Coburg	Falls City	Lebanon	Philomath	Tangent
Corvallis	Foster	Lyons	Rickreall	Turner
Cottage Grove	Gates	Marion	Salem	Waterloo
Crabtree	Halsey	Mehama	Scio	