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COMPANY NAME: PacifiCorp d/b/a Pacific Power

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List Key Words for this report. We use these to improve search results.

2022 Customer Communication and Outreach Report to the Energy Trust

Send the completed Cover Sheet and the Report in an email addressed to PUC.FilingCenter@state.or.us

Send confidential information, voluminous reports, or energy utility Results of Operations Reports to PUC Filing Center, PO Box 1088, Salem, OR 97308-1088 or by delivery service to 201 High Street SE Suite 100, Salem, OR 97301.

May 18, 2023

VIA ELECTRONIC FILING

Public Utility Commission of Oregon
Attn: Filing Center
201 High Street SE, Suite 100
Salem, OR 97301-3398

Re: RE 138—PacifiCorp's 2022 Customer Communication and Outreach Report to the Energy Trust of Oregon

Enclosed for filing by PacifiCorp d/b/a Pacific Power is the 2022 Customer Communication and Outreach Report to the Energy Trust of Oregon. This report is submitted at the request of the Public Utility Commission of Oregon Staff.

Please direct any informal inquiries to Jennifer Angell, Regulatory Project Manager, at (503) 331-4414.

Sincerely,



Matthew McVee
Vice President, Regulatory Policy and Operations

Enclosure

2022 Pacific Power company energy efficiency programs and administration

Introduction

Adopted in 2021, Oregon House Bill 3141 created significant changes related to public purpose and energy efficiency rates for customers of investor-owned electric utilities. Energy efficiency funds collected through Public Purpose Charge was removed and new language created to require electric companies to directly collect funds necessary to plan for and pursue cost-effective energy efficiency resources in rates through charges paid by all retail electricity customers. (ORS 757.054)

In November 2021, the company proposed to cancel Schedule 297, Energy Conservation Charge, a charge to certain retail electricity customers to provide additional funds for energy efficiency and conservation not fully funded under Public Purpose Charge, and create a new Schedule 291, System Benefits Charge (SBC), which collects funds for energy efficiency, demand response, and transportation electrification programs from all customers. Schedule 291 became effective January 1, 2022. In January 2023, funding was added to Schedule 291 to cover certain utility stakeholder outreach. This consolidation into a single tariff allows for specific funding to each separate program while keeping a single line item on the customers' bills for all system beneficial program funding.

The company collects through the energy efficiency portion of the SBC, funds to be distributed to Energy Trust of Oregon (Energy Trust) and funds to be retained by Pacific Power for self-perform programs, home energy reports and program administration. This document provides a summary of activities for those retained funds.

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 SBC 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 SBC 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 on educating customers about Energy Trust programs and services across our diverse Oregon service area, but especially in rural and underserved areas outside of the Portland metro area. The SBC 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 2022, 79% of Pacific Power residential customers are aware that Pacific Power offers solutions to help customers use energy more efficiently.

To better reach small and mid-size business customers with personalized energy efficiency advice and programs, Pacific Power and Energy Trust collaborated to launch Business Energy Reports in late 2022. This outreach builds upon existing Home Energy Reports that are sent to residential customers.

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. The teams collaboratively manage a tactical calendar that is flexible to evolve with program needs. Pacific Power also incorporates requests for energy efficiency program promotional support from Energy Trust, outside of the SBC 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 staff 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 among Pacific Power residential and small /mid-size business customers.

Communication Strategies

- Focus communications throughout Oregon to reach concentrated and highly populated markets in Pacific Power's service area; 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, Over the Top streaming services (OTT), print, digital display, social media, email and direct mail.
- Evolve the co-branded advertising campaign that connects Oregon customers to Energy Trust offerings and celebrates customer empowerment through all the ways that customers show up as "doers" in their lives. Visuals showcase people in their homes or places of work who are engaged in everyday activities.
- Increase and enhance communications and outreach in Spanish.
- Reach customers during seasonally optimal periods when they are thinking about energy efficiency measures the most.
- Provide customers with solutions to help them save money through energy improvements, expert assistance, and no-cost tools.
- Enhance outreach to Oregon small- and mid-size commercial customers through Business Energy Reports that provide energy-saving recommendations and incentives to help customers make the business case for retrofits and upgrades.
- Utilize existing community and customer relationships through regional business managers (RBMs).

Key message

Pacific Power and Energy Trust of Oregon have programs and tools built around your needs, helping you save money, save energy and take the all-important leap from to-do to job well done.

Communications and Outreach Activities

See Appendix A for activity details

Communication Tactic	Description	2022 Results / Impressions / Approximate Quantities
SBC-funded communications and outreach activities		
<ul style="list-style-type: none"> Advertising included cable TV, OTT, radio, digital display, and social media ads. Focus of the campaign is energy rebates, incentives, and tools available from Pacific Power and Energy Trust. Ads refer customers to BeWattsmart.com (Pacific Power page with clear links to Energy Trust) 		
Cable TV	Targeted cable TV ads	Cable TV 1,200 spots
Radio advertising	Radio ads in Southern Oregon, Central Oregon and in the Willamette Valley (Spanish as available)	575 TRPs* 1,425 spots *Total Rating Points
Digital advertising	OTT, digital display advertising, social media advertising and search engine marketing (SEM) in English and Spanish	Impressions: OTT 58,771 Pre-roll video 224,994 Display 501,560 Social 599,147 SEM 6,751
Total advertising campaign impressions: 1,393,848		
Home Energy Report emails	Home Energy Report emails provide personalized energy usage insights. Two emails are sent per month with a monthly usage summary and a similar homes comparison. The program achieved a 97% delivery rate, 48% open rate, and 77% provided positively to an optional satisfaction response survey.	5 million+ emails 30,000+ print mail
Business Energy Report emails	Business Energy Report monthly emails began in November 2022. Customers initially receive a “welcome” email that tells them what to expect and invites them to explore their web portal. Then they receive ongoing monthly emails containing personalized energy usage insights, energy-saving tips and links to Energy Trust incentive programs. The emails have an open rate of 40% and a click rate of 3%.	48,000+ emails
Energy Trust survey emails	Collaborated with Energy Trust to send emails in English and Spanish to targeted customers to encourage them to provide feedback for research.	2,561 English emails 22 Spanish emails

Smart thermostat direct install emails	Emails with special pricing on smart thermostats	114,585 emails
Black Friday smart thermostat emails	Emails with special pricing using "PACIFICPOWER" discount code on smart thermostats	70,334 emails
Irrigation Mailing	Mailings to Oregon irrigation customers highlighting irrigation incentives and offerings.	8,783 mailings
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.	945,000 inserts
<i>Energy Insights</i> large business/managed account customer newsletter	Collaborated with Energy Trust to deliver a lighting energy-savings article to large business customers	125 emails
Oregon small business customer survey emails	Emails with link to survey to gather input from small businesses regarding overall satisfaction, topics of interest for communications, preferred communications channels, Time of Use rates, etc.	21,862 emails
New customer mailings	Mailings to new customers mention Energy Trust services and incentives, as well as the data transfer.	70,000 mailings
Web	PacificPower.net/Wattsmart and promotional URL BeWattsmart.com link to Energy Trust's website.	241,920 pageviews
Twitter @PacificPower_OR	Tweets a few times per month with information on energy efficiency.	6,589 followers
Facebook Instagram	Information and tips posted three times or more per month.	29,914 Facebook followers 1,300 Instagram followers
Energy Trust-funded communications and outreach activities with Pacific Power		
Bill inserts in Pacific Power bills	Occasional bill inserts promote Energy Trust residential incentives and services.	300,000 inserts

Diversity, Equity and Inclusion

In 2022, Customer engagement continued through traditional marketing approaches. However, based on the collaborative success between Pacific Power and Energy Trust, the company continued to investigate new ways to target customers in energy burdened, lower income, and rural communities. Additionally, new arenas opened for community and customer engagement enabled by several legislative actions completed in 2021 and put into action throughout 2022. The collaborative work already undertaken and

new work around Public Purpose Charge, Distribution System Planning, Clean Energy Plan, expanded Spanish language materials, and direct Tribal engagement continued to drive improvements in how the company and Energy Trust work with stakeholders, communities, and customers.

Commercial and Residential Energy Reports

Business Energy Report monthly emails began reaching approximately 24,000 customers in November 2022. Customers initially receive a “welcome” email that tells them what to expect and invites them to explore a web portal for more insights. Business customers receive ongoing monthly emails containing personalized energy usage information, energy saving tips and links to Energy Trust incentive programs. The emails have an open rate of 40% and a click rate of 3%.

Commercial and Residential Outreach

Although on pause since the COVID-19 pandemic, Pacific Power is considering how to re-engage 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. Typically, as directed by Pacific Power, the field energy consultants present and coordinate 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.

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 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.

APPENDIX A: 2022 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 & OTT

- Consumer Choices TV & OTT (English & Spanish)
- Winter Heating Solutions TV & OTT (English & Spanish)

Radio

- Choices to save money (English & Spanish)
- Winter energy savings (English & Spanish)

Digital/social media

- Wattsmart® gives you the power of choice (English & Spanish)
- Smart summer choices save you money (English & Spanish)
- Keep cozy this winter with Wattsmart® (English & Spanish)
- Explore usage insights with Home Energy Reports (English & Spanish)
- Heat pumps can help you save (English & Spanish)

In customer bills

Connect residential newsletter

- Your energy, your choice (smart thermostats and Time of Use)
- This summer, chill out and save (efficient heat pumps and air conditioners)
- Welcome the changing seasons (smart thermostats)

Bill inserts

- Wattsmart® savings built around your needs

Outbound envelope

- Choices for savings and more
- Stay cool and save

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

¹ Some activities are funded outside of SBC funds.

- New Residential Letter
- Irrigation Direct Mail – letter and brochure

Email

- Home Energy Reports (personalized energy usage insights)
 - Monthly summary email
 - Similar homes comparison
- Business Energy Reports (personalized energy usage insights)
 - “Welcome” email
 - Ongoing monthly emails
- Energy Trust survey email (Share your opinions and help Oregonians save energy)
- Smart thermostat direct install email (Special offer: Get Google Nest or ecobee for \$25)
- Black Friday smart thermostat email (Order your free smart thermostat today)

Websites / Social Media (energy efficiency content)

- BeWattsmart.com
- Pacific Power Facebook page
- Pacific Power Oregon Twitter
- Pacific Power Instagram
- Pacific Power YouTube

APPENDIX B: 2020 Pacific Power Customer Targeting Data

City, County, Zip	RES customers # size rank of 180 zips*	% households receiving EAP	% of county living ≤ Federal poverty
1. Warm Springs, Jefferson 97761	728 (# 93)	39.6%	16.0%
2. Portland, Multnomah 97205	1,660 (# 67)	22.7%	12.0%
3. Sprague River, Klamath 97639	291 (#127)	16.2%	18.5%
4. Kerby, Josephine 97531	290 (#128)	13.8%	17.0%
5. Madras, Jefferson 97741	4,001 (# 38)	13.6%	16.0%
6. Cottage Grove, Lane 97424	3,302 (# 45)	13.5%	18.1%
7. Bly, Klamath 97622	265 (#131)	12.8%	18.5%
8. Beatty, Klamath 97621	159 (#141)	12.6%	18.5%
9. Lakeview, Lake 97630	1,691 (# 66)	10.4%	18.3%
10. Butte Falls, Jackson 97522	229 (#134)	10.0%	14.8%

County RES Customers	RES customers # size rank of 26 counties*	Geographic designation	% of county living ≤ Federal poverty
1. Klamath	28,619 (# 7)	Rural	18.5%
2. Lake	1,750 (#20)	Frontier	18.1%
3. Lane	6,814 (#16)	Urban/Rural	18.1%
4. Josephine	36,616 (# 5)	Rural	17.0%
5. Jefferson	5,990 (#18)	Rural	16.0%
6. Coos	20,988 (# 9)	Rural	15.9%
7. Benton	23,529 (# 8)	Urban/Rural	15.8%
8. Umatilla	14,376 (#11)	Rural	15.8%
9. <i>Morrow</i>	<i>28 (#24)</i>	<i>Frontier</i>	<i>15.4%</i>
10. Douglas	35,885 (# 6)	Rural	15.0%
11. <i>Curry</i>	<i>4 (#26)</i>	<i>Rural</i>	<i>14.9%</i>
12. Jackson	77,794 (# 1)	Urban/Rural	14.8%
13. Marion	10,611 (#13)	Rural	14.5%
14. Wallowa	4,054 (#19)	Frontier	14.5%
15. Sherman	631 (#21)	Frontier	13.9%
16. Lincoln	9,934 (#14)	Rural	13.6%
17. Wasco	497 (#22)	Rural	13.4%
18. Crook	7,124 (#15)	Rural	12.9%
19. Linn	45,794 (# 4)	Urban/Rural	12.7%
20. Polk	12,676 (#12)	Rural	12.7%
21. Multnomah	68,487 (# 2)	Urban	12.0%
22. Gilliam	338 (#23)	Frontier	11.4%
23. Clatsop	19,671 (#10)	Rural	11.0%
24. Hood River	6,020 (#17)	Rural	10.9%
25. <i>Columbia</i>	<i>12 (#25)</i>	<i>Rural</i>	<i>10.2%</i>
26. Deschutes	54,364 (# 3)	Urban/Rural	9.4%

*Oregon zip codes and counties within Pacific Power's Oregon service territory.