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COMPANY NAME: PacifiCorp d/b/a Pacific Power

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2019 Customer Communication and Outreach Report to the Energy Trust

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May 15, 2020

***VIA ELECTRONIC FILING***

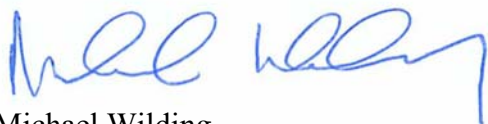
Public Utility Commission of Oregon  
Attn: Filing Center  
201 High Street SE, Suite 100  
Salem, OR 97301-3398

**RE: RE 138—2019 Customer Communication and Outreach Report to the Energy Trust of Oregon**

Enclosed for filing by PacifiCorp d/b/a Pacific Power is the 2019 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, Regulatory Affairs Manager, at (503) 813-5934

Sincerely,



Michael Wilding  
Director, Regulation

Enclosure

## 2019 PacifiCorp Commercial and Residential SB 838 Work

### Introduction

Through passage of Senate Bill (SB) 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 of Oregon 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, PacifiCorp d/b/a Pacific Power (Pacific Power or Company) recognized the value Energy Trust of Oregon (Energy Trust) 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 seventh annual report.

### Communications and Outreach Approach

With more than 100 years of service, Pacific Power has strong awareness among its 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 its customers, engage with 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 its 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 its customers are aware of opportunities available from Energy Trust. In 2019, 78 percent of Pacific Power's residential customers in Oregon were 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 Company 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 teams 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, 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 (RBM).
- Collaborate with Energy Trust to develop marketing in targeted geographic areas.

#### *Key message*

Pacific Power's key message for 2019 was that you have the power to save energy and money through programs available through Energy Trust. Language used to support this message included:

- "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	2019 Results / Impressions / Approximate Quantities
<b>SB 838-funded communications and outreach activities</b>		
TV, radio, print and outdoor advertising	<ul style="list-style-type: none"> <li>Starting in May, ran TV, radio, print and outdoor advertising.</li> <li>Placed outdoor posters in certain markets.</li> <li>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.</li> <li>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 ran in January and February and are co-branded with Energy Trust and Pacific Power to direct customers to <a href="http://energytrust.org/mybusiness">energytrust.org/mybusiness</a>.</li> </ul>	Impressions: TV/Cable 8,232,965 Radio 5,145,810 Print 468,549 Digital 9,222,123 Social 2,842,986 Outdoor 9,834,384 Sponsorship 5,935,708 TOTAL 41,682,525
Business print ads	Placement examples include: Cascade Business Book of lists and Cascade Business. 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.	
Digital advertising	<ul style="list-style-type: none"> <li>Banner ads on local media sites, blogs, behavioral ad targeting and pay-per-click ad placements.</li> <li>Temperature-triggered digital/social ads also ran during the summer months to encourage customers to increase thermostat setting and/or use fans to stay cool and save.</li> </ul>	
Events	<ul style="list-style-type: none"> <li>Events were held in 17 communities throughout the state in 2019.</li> <li>Promotional support for events included direct mail, email, flyers and community outreach.</li> </ul>	Email 7,146 Print mail 4,867
<b>Pacific Power-funded communications and outreach activities</b>		
Connect 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 260,000 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 along the North Coast	1,170 mailings

Web	<ul style="list-style-type: none"> <li>• pacificpower.net/wattsmart and promotional URL BeWattsmart.com linked to Energy Trust's website.</li> </ul>	88,539 page views (from July 25, 2019 through December 31, 2019)  *Pacific Power's new website launched on July 25, 2019.
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
<b>Energy Trust-funded communications and outreach activities with Pacific Power</b>		
Bill inserts in Pacific Power bills	Two to three inserts per year to promote Energy Trust residential incentives/services, smart thermostats; inserts also posted online for customers who receive paperless billing.	540,000 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 events occurred in Albany, Bend, Corvallis, Cottage Grove, Dallas, Enterprise, Falls City, Hood River, Klamath Falls, Madras, Medford, Millersburg, Pendleton, Redmond, Roseburg, and Stayton, 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 Wattsmart 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.

#### Conferences and Events

Pacific Power works with Chambers of Commerce and other community and business groups to promote energy efficiency at local events and conferences. Energy efficiency focused collateral referencing Energy Trust is distributed at these events.

**Customer Participation**

Locations	Chambers of Commerce, business / community groups / conferences	Be Wattsmart / Pacific Power workshop	2019 Total
Albany		25	25
Bend		30	30
Corvallis		25	25
Cottage Grove		20	20
Dallas		25	25
Enterprise		25	25
Falls City		65	65
Hood River	12,000*	25	12,025
Klamath Falls		85	85
Lebanon	8,500*		8,500
Madras		35	35
Medford		25	25
Millersburg	500*		500
Pendleton	40*		40
Redmond		<b>15</b>	<b>15</b>
Roseburg		<b>30</b>	<b>30</b>
Stayton		<b>35</b>	<b>35</b>
	<b>21,040</b>	<b>465</b>	<b>21,505</b>

- Hood River Harvest Festival, Lebanon Strawberry Festival, and Millersburg Celebration 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 RBMs, participates in Energy Trust communications and program collaboration meetings, coordinates on-bill repayment activities through Energy Efficiency and Sustainable Technology (EEAST) and other programs, coordinates utility data transfers, develops regular and ad hoc data, provides 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

## APPENDIX A: 2019 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.<sup>1</sup>

**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 – River

### In customer bills

#### **Connect residential newsletter and e-newsletter**

- Celebrate smart savings (smart thermostats)
- Freshen up your savings (windows and insulation)
- Cool down with a heat pump
- Warm comfort, cool savings

#### **Bill inserts**

- Reward yourself with energy-saving upgrades
- A simple way to save (order your free Energy Saver Kit)
- We have the power to save (smart thermostats)

#### **Outbound envelope**

- Easy steps, easy savings
- The power of choice (smart thermostats)
- Stay cool and save

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<sup>1</sup> 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 Wattsmart event announcements
- Small Business Direct Install – letter and flyer
- Irrigation Direct Mail – letter and brochure
- Reliable comfort at a discount price (heat pump promotion)
- Is it a good time for a light bulb moment? (TLED promotion)
- Simple savings delivered to your door (Energy Saver Kit)

**On the web****Email**

- Energy efficiency event announcements
- New Year and Thank You email (lighting focused)

**Online Media**

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

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

- [pacificpower.net/wattsmart](http://pacificpower.net/wattsmart)
- [BeWattsmart.com](http://BeWattsmart.com)
- Pacific Power Facebook page
- Twitter

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

- Residential energy efficiency brochure
- I have the power to be Wattsmart brochure
- Partners in Innovation – business brochure
- Be Wattsmart workshops flyers and signage