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COMPANY NAME: PacifiCorp d/b/a Pacific Power

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2017 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

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May 15, 2018

VIA ELECTRONIC FILING

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

Attn: Filing Center

RE: 2017 Customer Communication and Outreach Report to the Energy Trust of Oregon

Enclosed for filing by PacifiCorp d/b/a Pacific Power is the 2017 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 Natasha Siores, Manager, Regulatory Affairs, at (503) 813-6583

Sincerely,



Etta Lockey
Vice President, Regulation

Enclosure

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

2017 Pacific Power Commercial and Residential SB 838 Efforts

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 fifth 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 2017, 61% of Pacific Power residential customers in Oregon are aware that Pacific Power partners with Energy Trust of Oregon to offer incentives and rebates for home energy efficiency improvements.

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 for a learning pilot project in the North Santiam Canyon.

Key message

We can help you save energy and money through programs available through Energy Trust remains 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."

Summary of 838-funded communications and outreach activities

See Appendix A for activity details

Communication Tactic	Description	2017 Results / Impressions / Approximate Quantities
TV, radio, print and outdoor advertising	<ul style="list-style-type: none"> Starting in June, 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 2,077,634 Radio 1,293,750 Print 548,973 Digital 2,916,352 Social 181,474 Search 29,837 Outdoor 10,869,534 Sponsorship <u>2,421,278</u> TOTAL 20,338,832
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 (90 games, plus playoffs).	
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 15 communities throughout the state in 2017. Promotional support for events included direct mail, email, flyers, bill inserts, social media and community outreach. 	Email 14,621 Print mail 77,711

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 Astoria, Coos Bay, Corvallis (2), Dallas, Hood River, Jacksonville, Klamath Falls (3), Lakeview, Lebanon, Mill City, Medford, Pendleton, Portland, Redmond (2), and Stayton (2), Oregon. The presentations highlighted Pacific Power's relationship with Energy Trust and available programs and incentives to save energy and money. Pacific Power also offered:

- An on-site walk through with Pacific Power to document information about the customer's building and how they use energy. Field energy consultants reviewed lighting, office equipment, HVAC and foodservice equipment. Pacific Power also provided practical no cost/low cost ideas for saving energy and a review of which improvements were eligible for Energy Trust cash incentives.
- Additional support for on-site assistance from Energy Trust of Oregon and local contractors.
- Regular checkups with Pacific Power on recommended energy saving improvements.

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 watt smart / Pacific Power events	2017 Total
Astoria		87	87
Coos Bay		319	319
Corvallis		160	160
Dallas		81	81
Hood River	12,000*	126	12,126
Jacksonville		231	231
Klamath Falls		818	818
Lakeview		26	26
Lebanon		64	64
Mill City		25	25
Medford	19		19
Pendleton		107	107
Portland	7,504*		7,504
Redmond		110	110
Stayton		77	77
TOTAL	19,523	1,665	21,734

Hood River 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

Summary of Pacific Power-funded communications and outreach activities

See Appendix A for activity details

Communication Tactic	Description	2017 Results/ Approximate Quantities
Voices residential customer newsletter	Energy efficiency and Energy Trust programs mentioned Pacific Power newsletter sent in bills and through email. Newsletter content developed collaboratively with Energy Trust.	2.7 million inserts 425,000 emails
New customer mailings	Mailings to new customers mention Energy Trust services and incentives, as well as the data transfer.	45,000 mailings
Irrigation customer mailings	Mailed letter to Oregon irrigation customers about Energy Trust of Oregon incentives	4,477 mailings
Energy Saver Kit postcard	Postcard mailing targeting residential customers in the North Santiam Canyon pilot	1,298 postcards
Residential customer emails	Sent winter energy efficiency tips email, including incentives for heat pumps and insulation	183,000 emails
Business customer emails	Four emails were sent to business customers about products and services available to them, including energy efficiency incentives through Energy Trust.	39,046 emails
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. 	75,548 page views 15,252 referrals/click-throughs to ETO
Twitter @PacificPower_OR	Tweets several times per week, some promote energy efficiency and Energy Trust incentives/services.	3,401 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.	19,235 fans

Summary of Energy Trust-funded communications and outreach activities with Pacific Power

See Appendix A for activity details

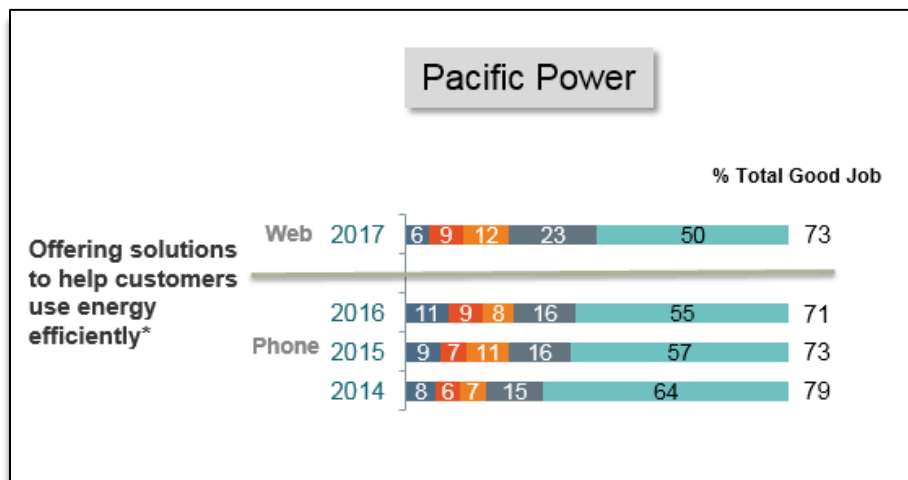
Communication Tactic	Description	2017 Results/ Approximate Quantities
Bill inserts in Pacific Power bills	Two to three inserts per year to promote Energy Trust residential incentives/services, smart thermostats and local workshops; inserts also posted online for customers who receive paperless billing.	732,081 inserts

Outcomes: Overall awareness improvement

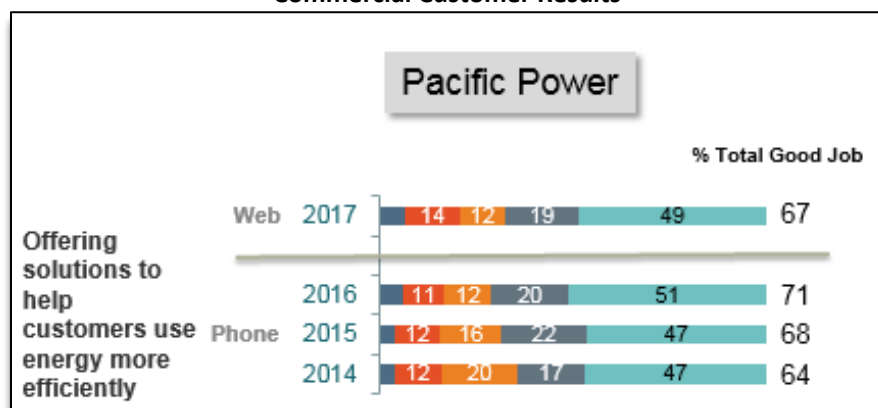
Pacific Power performs annual residential and commercial customer satisfaction studies. In 2017, results indicate customer satisfaction with Pacific Power offering solutions to help customers use energy efficiently remains high (73%). Over half of (65%) Pacific Power residential customers said they have taken action in the past year to save energy. In 2016, 69% of Pacific Power residential customers in Oregon were aware that Pacific Power partners with Energy Trust of Oregon to offer incentives and rebates for home energy efficiency improvements.

This finding was supported in the MSI residential customer satisfaction survey, which took place June 21 through July 9, 2017. There was a change in data collection mode from phone to online surveys starting in 2017. 1,862 online survey interviews were conducted among a random sample of Pacific Power customers. Participants were the primary decision-maker about how electricity is used in the home; 18 years of age and older; and neither respondent nor household member works in advertising, market research, or for a utility.

Residential Customer Results¹



Commercial Customer Results¹



Outcomes: Equitable regional participation – unique sites served

¹ % Total Good Job is the sum of customer ratings 6–10 on a scale of 1–10.

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 2008 - 2016	Southern OR	Klamath	Central OR	Mid-Willamette	NW Oregon	Eastern OR	Portland
Customer Distribution	35.2%	7.0%	12.7%	22.2%	5.7%	4.10%	13.1%
2007 (pre SB 838)	33.0%	4.7%	12.8%	24.4%	4.0%	4.2%	17.0%
2008	32.2%	2.9%	17.5%	20.9%	11.0%	6.4%	9.1%
2009	34.6%	5.5%	13.1%	24.0%	4.3%	3.0%	15.5%
2010	30.1%	3.7%	8.4%	36.3%	8.1%	2.6%	10.8%
2011	35.5%	5.1%	12.0%	23.4%	4.6%	3.6%	15.9%
2012	37.3%	5.4%	13.8%	22.0%	3.9%	2.6%	15.1%
2013	38.3%	4.7%	13.8%	21.7%	4.1%	2.5%	15.0%
2014	35.6%	5.2%	12.6%	23.1%	4.7%	2.9%	15.9%
2015	34.1%	4.7%	15.7%	23.3%	3.9%	2.8%	15.4%
2016	32.4%	6.7%	17.6%	21.7%	4.0%	2.0%	13.9%
2017	31.4%	3.9%	22.2%	21.1%	3.6%	2.5%	15.4%

Outcomes: Equitable regional participation – measures installed

Pacific Power regions are identified in Appendix B

Measures Installed 2008 - 2016	Southern OR	Klamath	Central OR	Mid-Willamette	NW Oregon	Eastern OR	Portland
Customer Distribution	35.2%	7.0%	12.7%	22.2%	5.7%	4.1%	13.1%
2007 (pre SB 838)	31.4%	3.6%	11.3%	24.0%	3.2%	6.9%	19.6%
2008	32.7%	2.6%	15.9%	23.4%	8.8%	5.3%	11.2%
2009	34.9%	4.8%	13.2%	24.0%	4.2%	3.2%	15.7%
2010	31.8%	3.9%	9.6%	31.9%	7.1%	3.0%	12.7%
2011	44.9%	6.4%	11.6%	17.9%	3.5%	3.3%	12.4%
2012	41.0%	5.7%	13.2%	21.1%	3.4%	2.5%	13.1%
2013	39.7%	5.1%	12.7%	21.6%	3.6%	2.7%	14.6%
2014	35.2%	5.1%	11.9%	24.3%	4.6%	3.3%	15.6%
2015	32.1%	4.5%	15.9%	25.1%	3.9%	3.2%	15.3%
2016	33.1%	6.7%	16.3%	23.4%	4.1%	2.1%	14.4%
2017	30.6%	5.4%	21.6%	20.2%	3.6%	3.6%	15.0%

Conclusion and Opportunities

General Awareness: In 2017, 73% of customers responded that Pacific Power is doing a good job of having programs to help customers use energy efficiently and 65% of customers responded that they have taken action in the past year to save energy. In 2017, 61% of Pacific Power residential customers in Oregon were aware that Pacific Power partners with Energy Trust of Oregon to offer incentives and rebates for home energy efficiency improvements.

Regional Participation: As determined from Energy Trust data, customer participation in Pacific Power's regions has remained stable, with a slight 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: 2017 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.²

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

TV

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

Radio

- Be **wattsmart** workshop – Klamath Falls
- Spring savings tips
- Being **wattsmart** helps Oregon **Thrive** radio :60 and :30
- We can all make Oregon better, **wattsmart** tips :30
- Team **wattsmart**

Print

- Bike Shop ad
- Being **wattsmart** is Good – Pendleton
- Being **wattsmart** is Good – Klamath Falls
- Being **wattsmart** is Good – North Santiam
- Being **wattsmart** is Helps – North Santiam
- Be **wattsmart** workshops

Outdoor

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

In customer bills

Voices residential newsletter and e-newsletter

- Easy choices for a great 2017
- 6 easy energy tips for spring
- Shower in savings
- Is your home wasting energy?
- Find your kind of cool
- Find a home with built-in savings
- Create your comfort zone
- Stay cozy and cut heating costs
- Simple steps to lower energy bills
- This way to a **wattsmart** winter
- LED lights brighten the season

² Some activities are funded outside of SB 838 funds.

Bill inserts

- Cash in on energy-saving home improvements
- Saving energy is good for you and Oregon
- Small changes can lead to big energy savings
- Be **wattsmart** Workshop Klamath Falls
- Fall Be **wattsmart** workshops – Onsert

Outbound Envelope

- Be **wattsmart** to jump start 2017
- Cool your home and your energy bill
- Easy steps to save energy as the seasons change

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** workshop announcements
- Energy Saver Kit postcard
- Irrigation incentives letter
- Irrigation incentives brochure

On the web**Email**

- 5 ways to save money this winter
- Energy efficiency workshop announcements

Online Media

- Winter savings tips – Facebook ads
- 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
- 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
- Be **watt**smart workshops flyers and signage

APPENDIX B: Pacific Power Oregon Regions

Southern Oregon

Applegate	Coos Bay	Idleyld Park	Phoenix	Tiller
Arago	Coquille	Jacksonville	Powers	Trail
Ashland	Days Creek	Kerby	Prospect	Umpqua
Azalea	Diamond Lake	Medford	Riddle	White City
Bandon	Dillard	Merlin	Rouge River	Wilbur
Broadbent	Eagle Point	Myrtle Creek	Roseburg	Wilderville
Butte Falls	Gaylord	Myrtle Point	Selma	Williams
Canyonville	Glendale	North Bend	Shady Cove	Winchester
Cave Junction	Glide	Norway	Sunny Valley	Winston
Central Point	Gold Hill	O Brien	Sutherlin	Wolf Creek
Charleston	Grants Pass	Oakland	Talent	

Klamath Basin

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

Central Oregon

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

Mid-Willamette Valley

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

Northwest Oregon

Arch Cape	Cannon Beach	Hammond	Mosier	The Dalles
Arlington	Clatskanie	Hood River	Parkdale	Tolovana Park
Astoria	Gearhart	Kent	Rufus	Warrenton
Boardman	Grass Valley	Moro	Seaside	Wasco

Eastern Oregon

Adams	Helix	Lostine	Pendleton	Umatilla
Athena	Hermiston	McNary	Pilot Rock	Wallowa
Echo	Imnaha	Milton	Rieth	Weston
Enterprise	Joseph	Freewater	Stanfield	

Portland

Maywood Park
Portland
Troutdale