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May 13, 2022

VIA ELECTRONIC FILING

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

Re: RE 138—2021 Customer Communication and Outreach Report to the Energy Trust of Oregon

Enclosed for filing by PacifiCorp d/b/a Pacific Power is the 2021 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,



Shelley McCoy
Director, Regulation

Enclosure

2021 Pacific Power Commercial and Residential Senate Bill 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 to authorize electric companies to "include in its rates the costs of funding or implementing cost-effective energy conservation measures." (Oregon Revised Statute 757.689) Rather than developing distinct programs, Pacific Power 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 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 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 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 customers are aware of opportunities available from Energy Trust. In 2021, 80% of Pacific Power residential customers 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 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. 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 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 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 and 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.
- Develop a new 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.
- 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.
- Recognize the ongoing impacts from COVID-19 on customers with solutions to help them save money through energy improvements, expert assistance and no-cost tools.
- 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.

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	2021 Results / Impressions / Approximate Quantities
SB 838-funded communications and outreach activities		
<ul style="list-style-type: none"> Starting in March, ran TV, cable TV, OTT, print, 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) and to Energy Trust's toll-free phone number. 		
TV & cable TV	Ran TV and cable TV in targeted area	TV 720 TRPs* Cable TV 5,887 spots *Total Rating Points
Print advertising	Ads in Albany/Corvallis, Astoria, Bend, Columbia Gorge, Coos Bay, Grants Pass, Klamath Falls, Lebanon, Medford, Pendleton and Roseburg	658,768 impressions
Digital advertising	Ran OTT, digital display advertising, social media advertising and search engine marketing	OTT 387,954 Pre-roll video 1,192,613 Digital 3,927,961 Social 2,005,425 SEM 101,403
Total advertising campaign impressions: 8,280,731		
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 emails had a 38% open rate, nearly double the utility industry average. Email recipients also gave the email communications they received 88% "likes" via thumbs up and thumbs down voting buttons included with every message.	5 million+ emails
Irrigation Mailing	Mailings to Oregon irrigation customers highlighting irrigation incentives and offerings.	4,400 mailings
Pacific Power-funded communications and outreach activities		
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.	945,000 inserts
New customer mailings	Mailings to new customers mention Energy Trust services and incentives, as well as the data transfer.	68,000 mailings

Web	<ul style="list-style-type: none"> • pacificpower.net/wattsmart and promotional URL BeWattsmart.com link to Energy Trust's website. 	105,353 pageviews
Twitter @PacificPower_OR	Tweets several times per month with information on energy efficiency.	6,128 followers
Facebook	Information and tips posted three times or more per month.	26,693 Facebook fans
Instagram		1,169 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.	315,000 inserts

Diversity, Equity, and Inclusion

The collaborative work already undertaken and new work around Public Purpose Charge, Distribution System Planning, Clean Energy Plan, and expanded Spanish language materials puts the company and Energy Trust at a head start as deeper stakeholder and community engagements are scheduled to begin in mid-2022. During 2020, the company undertook an effort to identify how best to achieve energy equity and target energy savings programs using county density, county poverty and customers receiving energy assistance payments. In response to the analysis in Appendix B, the company was able to deliver Whole Home Energy Kits (efficient light bulbs, shower heads, etc.) to these cities and counties in a manner that aligned with recent 2021 legislative advancements providing a useful step in continuing the energy equity journey. As a result, a recent history of spending by county provided in Appendix C will help guide future decisions to support diversity, equity, inclusion, and clean energy goals.

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. 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. However, due to the COVID-19 pandemic, Pacific Power events and Be Wattsmart workshops were not held in 2021.

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 Energy Efficiency And Sustainable Technology (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
- 1 average megawatt / Self Direct reconciliation

APPENDIX A: 2021 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 & Over the Top (OTT)

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

Print

- Greatness in action

Digital/social media

- Wattsmart® powers your job well done
- Keep warm this winter with Wattsmart®

In customer bills

Connect residential newsletter

- Act now to save on insulation
- Savings and benefits you can see (windows)
- Warm up to savings (insulation)

Bill inserts

- More time at home means more opportunity for savings

Outbound envelope

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

Email

- Home Energy Reports (personalized energy usage insights)
 - Monthly summary email

¹ Some activities are funded outside of SB 838 funds.

- Similar homes comparison
- Ductless Heat Pump Pilot

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

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

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.

APPENDIX C: August 2020 – August 2021 Incentive Distribution

PacifiCorp Oregon Customers and ETO Incentive Spending: August 2020-August 2021															
County	Customer Account Type						Grant Classification					Factored Data			
	Commercial	Industrial	Irrigation	Public Street and Hwy Lighting	Residential Sales	Total Customers	Renewable	Commercial	Industrial	Residential	Unspecified	Sum of Grand Total	% of Customers Served	\$/account	% of \$ Granted
Baker							\$86,801			\$1,433		\$88,234			0.3%
Benton	3,147	51	268	23	31,338	34,827	\$164,373	\$234,638	\$266,125	\$100,854		\$765,990	5.7%	\$22	2.4%
Clatsop	3,375	66	9	61	21,333	24,844	\$47,114	\$297,940	\$195,788	\$23,227		\$564,070	4.1%	\$23	1.7%
Coos	3,176	94	146	28	22,322	25,766	\$41,531	\$173,688	\$59,041	\$181,882		\$456,142	4.2%	\$18	1.4%
Crook	1,163	36	471	6	7,590	7,590	\$115,261	\$149,219	\$113,125	\$41,127		\$418,732	1.2%	\$55	1.3%
Deschutes	8,712	145	321	23	57,435	66,636	\$357,489	\$975,054	\$362,215	\$273,700		\$1,968,458	10.9%	\$30	6.1%
Douglas	5,560	112	435	41	37,927	44,075	\$46,097	\$220,057	\$918,122	\$357,523		\$1,541,798	7.2%	\$35	4.8%
Gilliam	156	2	21	3	397	579	\$2,450	\$1,170		\$3,589		\$7,209	0.1%	\$12	0.0%
Hood River	1,200	12	47	12	6,434	7,705	\$78,566	\$79,763	\$84,966	\$25,508		\$268,803	1.3%	\$35	0.8%
Jackson	10,197	225	830	42	81,535	92,829	\$859,916	\$1,024,331	\$633,951	\$473,024		\$2,991,223	15.2%	\$32	9.2%
Jefferson	1,155	57	423	8	8,603	10,246	\$491,715	\$79,834	\$514,424	\$25,085		\$1,111,058	1.7%	\$108	3.4%
Josephine	4,917	97	296	16	37,699	43,025	\$282,547	\$635,660	\$91,248	\$154,598		\$1,164,052	7.0%	\$27	3.6%
Klamath	4,547	74	1,913	74	29,963	36,571	\$168,800	\$498,911	\$229,974	\$141,721		\$1,039,406	6.0%	\$28	3.2%
Lake	421	26	15	4	1,837	2,303		\$125,315	\$1,638	\$23,381		\$150,334	0.4%	\$65	0.5%
Lane	1,092	42	11	7	7,090	8,242	\$5,490	\$45,408	\$24,429	\$53,593		\$128,919	1.4%	\$16	0.4%
Lincoln	1,325	9		26	10,595	11,955	\$6,309	\$86,890		\$28,350		\$121,548	2.0%	\$10	0.4%
Linn	5,454	191	709	45	45,342	51,741	\$153,028	\$442,870	\$1,714,295	\$230,506		\$2,540,699	8.5%	\$49	7.8%
Marion	1,278	27	442	13	10,932	12,692	\$151,398	\$159,425	\$20,940	\$174,057		\$505,819	2.1%	\$40	1.6%
Morrow	79	1	58		22	160	\$13,231		\$52,810	\$908		\$66,949	0.0%	\$418	0.2%
Multnomah	8,297	106	1	11	77,256	85,671	\$257,083	\$2,162,686	\$1,470,230	\$1,803,574		\$5,693,573	14.0%	\$66	17.6%
Polk	1,501	15	180	10	13,662	15,368	\$39,664	\$87,990	\$89,600	\$76,170		\$293,424	2.5%	\$19	0.9%
Sherman	244	1	23	11	685	964	\$2,400	\$1,780		\$2,069		\$6,249	0.2%	\$6	0.0%
Tillamook	7				93	100						\$0	0.0%	\$0	0.0%
Umatilla	2,713	52	792	38	15,133	18,728	\$126,282	\$246,126	\$721,053	\$132,550		\$1,226,012	3.1%	\$65	3.8%
Wallowa	1,008	20	265	6	4,140	5,439	\$141,351	\$46,837	\$44,454	\$7,114		\$239,755	0.9%	\$44	0.7%
Wasco	82	2	40	1	621	746	\$2,604	\$27,000		\$1,030		\$30,634	0.1%	\$41	0.1%
Washington								\$588		\$169		\$757			0.0%
Unspecified							\$14,296	\$44,493	\$3,042,164	\$2,479	\$5,944,226	\$9,047,658		\$15	27.9%
Oregon	70,806	1,463	7,716	509	529,984	610,478	\$3,655,795	\$7,847,672	\$10,650,591	\$4,339,221	\$5,944,226	\$32,437,505	100%	-	100%

Table 18: PacifiCorp Oregon Customers & Energy Trust of Oregon (ETO) Incentive Spending: Aug 2020 - Aug 2021 of PacifiCorp’s Oregon Distribution System Plan Report – Part 1. Submitted to Public Utility Commission of Oregon, October 15, 2021. [2021_PacifiCorp_Oregon_Distribution_System_Plan_Report_Part1.pdf](#)