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Annual Report on Support for Energy Trust of Oregon Energy Efficiency Goals

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Portland General Electric 121 SW Salmon Street • Portland, OR 97204 portlandgeneral.com

June 1, 2023

Public Utility Commission of Oregon Attn: Filing Center 201 High Street, S.E. P.O. Box 1088 Salem, OR 97308-1088

RE: RE 139 PGE 2022 Report on Support for Energy Trust of Oregon Energy Efficiency Goals

This report submitted under RE 139 highlights PGE's outreach and marketing efforts, under Schedule 110, to support Energy Trust of Oregon's 2022 goals. PGE is pleased with the solid partnership it has with the Energy Trust and appreciates the positive impacts these programs offer to customers. PGE typically submits the annual report to the OPUC around mid-May. PGE encountered technical difficulties with the report and although this annual report is provided as a courtesy to the OPUC, PGE appreciated the extra time to finalize this report.

Should you have any questions or comments regarding this filing, please contact Mary Widman at <u>mary.widman@pgn.com</u> Please direct all formal correspondence and requests to the following email address <u>pge.opuc.filings@pgn.com</u>

Sincerely,

\s\ Robert Macfarlane

Robert Macfarlane Manager, Pricing & Tariffs

Enclosure cc: JP Batmale Anna Kim

2022 PGE Residential and Commercial Retained Energy Efficiency Funds

Introduction

PGE collaborates with the Energy Trust of Oregon (Energy Trust) to increase our customers' awareness of and participation in Energy Trust residential and small-to-mid-sized business energy efficiency (EE) programs through marketing and outreach activities. In addition, PGE uses Senate Bill (SB) 838 funding to enhance trade-ally awareness of the Energy Trust Heat Pump program and Heat Pump installation standards. As a utility with existing customer relationships and communication channels, PGE can enhance SB 838-funded activity through newsletters and additional communications channels.

Historically, the (SB) 838 Report (now 'Retained Energy Efficiency Funds' Report) detailed marketing and outreach as funded via (SB) 838 (PGE Schedule 110). However, given recent legislation, House Bill (HB) 3141, it may serve to expand the scope of this report to include all joint investment and coordinated activities conducted to further energy efficiency participation (PGE Schedule 109).

In addition to the rules governing promotion, afforded by (SB) 838 funds, and provided and/or informed within Oregon Administrative Rules (OAR) 860-026-0015 (Division 26), OAR 860-027-0310 (Division 27), and in subsequent OPUC UM 1565 docket Order 13-104 and Order 17-047.), PGE entered into a HB 3141 Budget Coordination Memo in June 2022. This Memo formalizes a new budget and action planning process which includes utility-specific action plans. That is, in addition to a two-year action plan Energy Trust co-produces a plan summarizing activities that are unique to the customers of that utility.

SUMMARY OF MARKETING AND OUTREACH ACTIVITIES

Collaboration with the Energy Trust of Oregon

Annual planning

PGE marketing and outreach action plans are created based on market conditions, Energy Trust program goals and projected results. PGE focuses on promoting Energy Trust programs to customers likely to participate in the programs, those most in need of upgrades, and when PGE is the appropriate and effective communication channel. Senior utility and Energy Trust managers meet annually to discuss goals and plan for the upcoming calendar year.

Monthly planning

Marketing program and management-level staff then meet regularly to coordinate marketing activities. Throughout the year, collaboration meetings guide the direction of ongoing marketing activity to meet changing market conditions and adjust to changes in program offerings.



Retained energy efficiency funds communications are reviewed by Energy Trust staff for approval. PGE collaborates with the Energy Trust to ensure timing of specific communications is aligned with program participation goals.

Expectations, Goals and Impacts

PGE utilizes many communication channels and approaches. Activities directly drive customer participation in Energy Trust programs. All retained energy efficiency funds activity is designed to increase general awareness of Energy Trust programs. Specific promotions are developed based on lessons learned from previous outcomes. Promotions are evaluated based on metrics appropriate for the specific campaign. Other activities relate to elevating awareness of specific Energy Trust programs and these efforts are tracked via impressions. High-level goals included 1,700 heat pump installations and 500 qualified commercial and industrial/agricultural leads to Energy Trust or trade allies.

Residential Summary

PGE newsletters, called Home Connection, are leveraged to enhance SB 838 activity. PGE's print customer newsletter is sent six times a year to approximately 370,000 households along with their PGE bills. PGE's digital newsletter is also sent six times a year to roughly 380,000 customers with email addresses on file. Direct mail and email are utilized for more targeted marketing based on customer data that helps us identify and promote the right technological solutions to a more specific group of customers. Newsletters, social media ads, and digital ads are also utilized for general awareness and education.

PGE Marketplace is a website where PGE customers can purchase energy efficient light bulbs, smart thermostats, and other products that offer more control in how energy is used. On an annual basis PGE plans around typical e-commerce marketing dates, like Black Friday, Cyber Monday, Memorial Day and others to promote sales and offers to PGE customers. On a monthly basis, PGE sends emails, social media advertisements and digital ads. Twice in 2022, PGE also sent post cards to customers to promote smart thermostats and the Smart Thermostat Program, a demand response program. In 2022, there were 3,393 pre-enrollments in our Smart Thermostat program through the PGE Marketplace.

In 2022, there was record performance of the PGE Marketplace, partly due to an increase in Energy Trust incentives as well as enhanced marketing through PGE Marketplace. There were 5,928 smart thermostats sold through the Marketplace in 2022 - including other energy efficient products, there were a total of 8,009 products sold through the Marketplace.

Marketing campaign overview for 2022

2022 marked a return to "normal" for energy efficiency and heat pump marketing. As compared to previous years, which adjusted to the COVID-19 pandemic, 2022 had two regular heat pump promotions which were popular amongst customers. Additionally, there was a new focus on coordination with the Energy Trust. One big win was the addition of a callout to Energy Trust smart thermostat rebates in our PGE Marketplace marketing emails.



This particular email had an e-comm conversion rate of 5.24%, which is higher than our benchmark rate of 3.29% and was attributed to 69 Smart Thermostat Program pre-enrollments (they are pre-enrollments because customers must install and confirm installation to receive a rebate for the program).

We saw an increase in leads sent to heat pump contractors in 2022. We believe this is due to our marketing campaigns being more reminiscent to pre-pandemic campaigns as well as an increase in customer interest in electrification and heat pumps due to the Inflation Reduction Act and other news stories on heat pumps. In 2021, we sent a total of 796 leads to heat pump contractors, however in 2022 we sent 1,448 leads.



Example of co-branded marketing with PGE and Energy Trust of Oregon in our PGE Marketplace emails.

Marketing Activity

- Q1 2022 -
 - January bill insert that focused on cash back for energy savings and shared general incentive information.
- Q2 2022
 - o April 2022
 - Earth Day Marketplace promotions
 - Email, digital ads
 - o May 2022 -
 - Newsletter story promoting our Spring heat pump offer.
 - English / Spanish email to customers who own a home and have the right heating type for a heat pump installation.
 - Social and digital ads promoting the Spring promotion.



- Q3
 - o September 2022
 - English / Spanish email to customers who own a home and have the right heating/cooling type for a heat pump.
 - Social and digital ads promoting the Fall heat pump campaign begin.
 - Energy Efficiency Day
 - Emails, digital ads and postcard sent to customers from PGE Marketplace promoting smart thermostats.
- Q4
 - o October to November 2022 -
 - Continuation of Fall heat pump campaign
 - November: A feature in our customer newsletter promoting our Fall heat pump offer.
 - Black Friday and Cyber Monday deals
 - Email, digital ads



Get hot deals on clean, efficient summer cooling.

For a limited time, get up to \$1,700 off a ductless or ducted heat pump!

Read more

Example of the feature of heat pumps in our May customer newsletter.





Year-round comfort, efficiency and savings

It's easy to increase your comfort this winter while saving up to \$1,975* on a new, highly efficient heat pump! Plus, you could save up to 60% on your heating bill.



Black Friday deals on PGE Marketplace

Black Friday deals? More like Black Friday steals!

Shop now

Heat pump deals

Example of features in our customer newsletter featuring our Fall heat pump promotion as well

as deals through the PGE Marketplace, which offers deals and incentives to purchase energy efficient light bulbs, smart thermostats and other products that allow offer more control in how energy is used.

Expectations, Goals, and Impact (Based on the agreed upon plans between PGE/Energy Trust)

Table 1: Residential Program Activity Impressions*

Impressions	Q1	Q2	Q3	Q4	Total
Measured through newsletters, bill inserts, email, social media ads, employee news	768K	1.2M	133K	1.2M	3.3M

* Awareness is a key metric for SB 838 activity and is measured by impressions.

Table 2: PGE Marketplace Marketing Insights

Impressions	Total
Measured through email, social media ads	4.34M



Table 3: Energy Trust residential program participation¹

Program 2022	Q1	Q2	Q 3	Q4	Total
PGE customers who received an instant ETO discount at retail for heat pump water heaters	150	203	195	91	639
PGE customers who received a Midstream Distributor heat pump water heater	358	660	372	296	1,686
PGE customers who participated in Savings Within Reach (for electric measures including HPWH)	195	131	133	254	713
SWR in Elec Heated Homes	43	29	40	55	167
SWR in Gas Heated Homes	152	102	93	199	546
PGE customers who received ETO smart thermostat incentive (any eligible heating system)	696	1,690	2,951	7,310	12,647
PGE customers who received ETO smart thermostat incentive (electric heating system)	166	539	704	1,489	2,898
PGE customers who received ETO DHP incentive	212	326	196	370	1,104
PGE customers who received ETO ducted heat pump incentive	400	291	364	415	1,470
PGE customers who received ETO heat pump advanced controls incentive	53	58	52	59	222
Total	2,064	3,359	4,263	8,795	18,481

1 Instant discount numbers are counts of units; all other numbers are counts of customers served at verified sites.

Heat Pump Program Support

There are two dedicated PGE positions supporting the heat pump program. The positions include a Heat Pump Specialist and a Data Management Specialist.



PGE promotes residential high efficiency heat pumps and advanced control technology to customers as well as to PGE-approved heat pump contractors, connecting them to the Energy Trust incentive programs within PGE's service territory. PGE manages the relationship with 30 PGE-approved contractors in addition to three distributors. Contractors are required to be Energy Trust Trade Allies and must meet certain criteria to retain PGE-approved status, including, but not limited to, quality adherence and elevated customer satisfaction levels.

To ensure that heat pumps are installed to specifications, PGE performs quality assurance (QA) inspections on a percentage of heat pumps that are presumed eligible for Energy Trust incentives both for PGE-approved and non-PGE-approved contractors. These inspections verify that the installations produce the highest efficiency results and system performance, and that the customer receives the greatest benefit long-term.

Each on-site inspection confirms equipment and system compliance are to specifications. Inspections receive either a pass or fail grade. Depending on the severity of the failure, PGE may make simple corrections in the field. A failure that is larger in scale is referred to the installing contractor who works with the customer to take corrective actions. PGE also uses these opportunities to work with the contractor to instill future installation quality practices.

Ongoing data sharing between PGE, the heat pump contractors, and the Energy Trust program delivery contractor occurs monthly and weekly, respectively, throughout the year. We track goals, status, customer receipt of incentives, inspection results, market trends, and more.

Activity	Q1	Q2	Q3	Q4	Total	Goal
Inspections of Heat Pump Installations	80	39	60	42	221	200
Failed Installations	8	7	2	3	20	N/A
Simple Field Corrections	6	14	1	8	29	N/A

Table 3: Key Activity

HB 3141 Joint Investment and Coordinated Activity

Given 2022 was a HB 3141 implementation year there are no utility specific action plan residential marketing or outreach activities to report.

Residential Conclusion

- 1. Progress to Goals and Key Learnings:
 - a. PGE and Energy Trust Existing Homes Program project management met every two weeks to analyze QA findings and trade ally performance. Areas of focus included coordination of QA field inspections, new and progressive techniques including incorporating remote ductless heat pump inspections using Microsoft Teams, Facetime and other means.



- b. Heat Pump communications included two promotions in 2022 and nearly doubling in marketing leads sent to participating Energy Trust Trade allies from 796 in 2021 to 1448 in 2022.
- c. Customer demand for heat pumps was strong and greater than supply through the third quarter of 2022. The continuation of working from home and interest in home improvements appear to be the driver of demand. Extreme shortages of components and raw materials to American heat pump manufacturers and Japanese heat pump manufacturer importers are the main reason behind supply issues.
- d. The announcement of Inflation Reduction Act (IRA) incentives starting January 1, 2023 substantially reduced the market for heat pumps in November and December; customers believed they should wait until 2023 to complete heat pump purchases or lose out on incentives. Customers turned away installers when they arrived to install new heat pump systems, then rescheduled installations for the new year (2023).
- 2. Areas of Success:
 - a. Throughout the year, PGE provided contractors with monthly report cards that give performance feedback, including the quality of installations and level of customer service. Ranking contractors has increased their performance and addressed areas of concern. The metric showing the duration between when a heat pump is installed and when the Energy Trust incentive was received and helped contractors see if and where incentives were "stuck" in the process. In 2022, a few contractors still had outstanding incentive receivables from Energy Trust in the \$10s of thousands for instant incentives. Fortunately, prior to year-end, Energy Trust reported that they caught up on incentive processing, and turn around times reduced to normal.

PGE's gap analysis identified Energy Trust incentive eligible projects, the length of time between when Energy Trust received an incentive application, and when the incentive was paid. The analysis helped contractors identify process issues including administrative problems and improve cash flow.

The goal of the reports is to increase the number of Energy Trust qualifying heat pump installations and for contractors to better assist the submission of customer incentive applications as quickly as possible. These efforts resulted in more customers receiving Energy Trust incentives and receiving incentives more quickly and, in many instances, instantaneously. In turn, it helped contractors get more quickly reimbursed by Energy Trust for incentives the contractor gave customers up front. By year end, almost every PGE Approved Contractor consistently offered instant incentives.

b. PGE provided training at a heat pump technology related event: ORACCA (Oregon Chapter of Air Conditioning Contractors of America) utility roundup meeting. We also worked directly with a few Approved Contractors' staff to increase heat pump awareness and proper application. These activities help increase the number of Energy Trust qualifying heat pump installations.



3. Opportunities and Areas for Improvement:

Given recent legislation, House Bill (HB) 2475, it may serve to expand the scope of this report to include opportunities for bundling PGE and Energy Trust programs. Per UM 2211 PGE supports Staff's recommendation for Energy Trust of Oregon to "work with utilities to identify and target customers that have difficulty paying their bills with tailored energy saving opportunities." PGE also supports Staff's proposal for "baseline evaluation criteria and key design elements" in the context of utility Income Qualified Bill Discount (IQBD) program filings.

Launched in April 2022, PGE's IQBD program has an income threshold of 60% State Median Income (SMI). Bill payment assistance, available through external, third-party agencies (e.g., Community Action Agencies) also use 60% SMI. PGE partners with Oregon Housing & Community Services (OHCS) who administers the majority of bill payment assistance in Oregon through Community Action Agencies to obtain customer information. Customers who receive LIHEAP/OEAP assistance are automatically enrolled into our IQBD program.

Additionally Inflation Reduction Act (IRA) Home Electrification Rebates (HEERA)(Sec. 50122) are available to "individuals and aggregators carrying out energy efficiency upgrades of single-family homes...[and] multifamily buildings." These rebates are available to households of any income, but for households with a total annual income below 80% Area Median Income (AMI), rebates can cover a higher percentage of total project costs. More specifically, home electrification and appliance rebates are available to:

- Low-or-moderate income households
- Entities that own a multifamily building with low-to-moderate income households comprising at least 50% of the residents, and
- Organizations that are carrying out projects for low-to-moderate income households.

An opportunity exists to bundle PGE programs and rate designs with Energy Trust no/lowcost programs and Inflation Reduction Act rebates to support Energy Trust equity metrics (UM 1158), and maximize value for, and increase the participation of, income eligible customers. With respect to Energy Trust equity metrics, Staff defines "low-cost offers" as participant paying no more than 20 percent of project and product costs and no more than \$500 total. Offers include but are not limited to:

- No-Cost Ductless Heat Pump (DHP) Pilot (no-cost)
 - UM 1696 measure exception (2021)
- Manufactured home duct sealing (no-cost)
- In-home and online Home Energy Assessments (no cost)
- Strategic Energy Management for Affordable Multifamily Housing organizations (no-cost)
- Cooling workshops for multifamily tenants (no-cost)
- Residential smart thermostats (low-cost)
- Direct install home ceiling insulation (low-cost)
- Blanket insulation (no-cost)



- UM 1696 measure exception (2022)
- Hybrid HVAC Pilot
 - UM 1696 measure exception (2023)
- PGE rate designs like peak time rebates, community solar, income qualified bill discount (IQBD).
- IRA HEERA (< 80% AMI) includes heat pump HVAC systems, electric stoves and cooktops, heat pump water heaters, heat pump clothes dryers, circuit panel upgrades, insulation upgrades, ventilation upgrades, and wiring upgrades)

COMMERCIAL AND INDUSTRIAL/AGRICULTURE SUMMARY

PGE has two dedicated Outreach Specialists who focus is on enhancing customer awareness and facilitating their participation in Energy Trust programs. The results of these efforts are screened and qualified leads handed over to the Energy Trust. The team utilizes a variety of tactics to engage customers in Energy Trust programs.

Outreach activities include, but not limited to:

- On-site and phone consultations
- Targeted outbound customer calls
- Cold calls and door-to-door canvassing
- Response to business marketing
- Response to customer email inquiries <u>energy.consultation@pgn.com</u> Point of origin: PGE's web site and contact center
- Business partnerships (i.e. City of Portland Sustainability at Work program, Partners for a Sustainable Washington County Community, Clackamas County Resource Conservation and Solid Waste, Gresham Resource Efficiency Assistance to Businesses (GREAT), cities, etc.)
- Chamber, Business and Trade Association presentations
- Leveraging internal networks (i.e. Key Customer Managers, Governmental Affairs representatives, Economic Development, etc.)
- Assisting customers with Energy Trust application paperwork

Outreach Activities

These activities elevate Energy Trust program awareness and engage customers in identifying potential energy saving opportunities. The following events were held in each quarter demonstrating PGE's engagement and commitment in providing customers EE opportunities and learnings. Approximately 1,394 business customers attended these events. Engagement in these events results in customer requests for onsite energy efficiency consultations to identify energy efficiency upgrades PGE attended multiple events at the same chambers each quarter.



Q1	
	Gresham Chamber
	Hillsboro Chamber of Commerce
	Keizer Chamber
	Lake Oswego Chamber of Commerce
	North Clackamas Chamber
	Salem Chamber
	Tigard Chamber of Commerce
Q2	
	Beaverton Chamber of Commerce
	Gresham Chamber
	Hillsboro Chamber of Commerce
	Hillsboro/Beaverton Chambers of Commerce
	North Clackamas Chamber
	Tigard Chamber of Commerce
	Tualatin Chamber of Commerce
Q3	
	Hillsboro Downtown Partnership
	Beaverton Chamber
	Gresham Chamber
	North Clackamas Chamber
	Tigard Chamber
	Washington County Chamber
	Woodburn Chamber
	City of Woodburn
Q4	
	Beaverton Chamber
	Latino Business Association - Expo Negocio
	Gresham Chamber
	North Clackamas Chamber
	Tigard Chamber
	City of Woodburn
	Home Affinity Group
	Grand Re-opening Lovejoy Workshop
	Latino Business Alliance
	Good Morning Tigard
	Coffee Connection Beaverton

Commercial Energy Efficiency Marketing

PGE utilizes its business newsletter, *Business Connection*, (available both in print and via email) and direct marketing (email, direct mail, and digital advertising) to promote Energy Trust programs to business customers. The newsletter is sent to customers quarterly.



Marketing Activity

Newsletters

- February 2022 Featured story on the \$50 for 15 minute energy efficiency consultation campaign driving requests for site walkthroughs to the outreach team.
- May 2022 Business spotlight on Bennett Urban Farm Store demonstrating how they worked with PGE to access savings through the direct install lighting program. An additional story included six tips for energy-efficiency savings.
- August 2022 Business spotlight on GiGi's Café highlighting how the owner, Charlene, worked with PGE's Energy Experts to identify ways her business could save money through the direct install lighting program and a call-to-action to join the SMB Challenge campaign by signing up for a consultation
- November 2022 Feature story on lighting for safety, savings and sustainability. An additional story highlighted ECOVIBE, a local black-owned business, describing how local business are partnering with PGE to help them save money, increase operational efficiencies and be sustainable.

Marketing campaign(s)

In 2022, PGE's business marketing team continued to focus on relationship building and making it easy for businesses to access cost-savings incentives through PGE and Energy Trust. Our goal was to provide the right level of support and still help customers get connected to ETO incentives and rewards. We did this by:

- Partnering with local business associations including Oregon Restaurant & Lodging Association, Hispanic Metropolitan Chamber and the Home Builders Association.
- \$50 for 15-minute campaign (Jan Mar 2022)
- NW Food Show activation (June 2022)
- Small Business Social Challenge (June Sept 2022)
- Rebrand of energy consultations as Energy Savings Checkups (Q3 2022)
- Ongoing brighter business email and direct mail outreach
- Lovejoy Workshop grand reopening event support (Nov 2022)

Expectations, Goals and Impact (based on the agreed upon plans between PGE/ Energy Trust)

Table 4: Outreach Team Results

Key Objectives	Q1	Q2	Q3	Q4	Total	Goal
Increased participation- qualified leads delivered to Energy Trust	98	219	123	102	542	500
Increased awareness of Energy Trust programs - outreach presentations and networking	10	7	10	19	46	40

PGE

Table 5: Commercial Energy Efficiency Impressions

Impressions	Q1	Q2	Q3	Q4	Total	Goal
Measured through newsletters, direct mail, and email	91,500	8,352	121,222	97,500	318,574	N/A

Table 6: Commercial Energy Efficiency Requests for Consultation

Consultations	Q1	Q2	Q3	Q4	Total	Goal
Request through direct mail, email, PGE call center and outreach	215	275	170	176	836	800

HB 3141 Joint Investment and Coordinated Activity

Given 2022 was a HB 3141 implementation year there are no utility specific action plan commercial/industrial/agricultural marketing or outreach activities to report.

Commercial Conclusion

- 1. Progress to Goals and Key Learnings:
 - a. PGE business customer interest has increased as we emerged from the pandemic. There was an increase of 39.3% consultation requests and 35.2% increase in leads to Energy Trust compared to 2021.
 - b. PGE fully transitioned back to in-person consultations in 2022. Most customers prefer in-person interactions and PGE finds customers are much more likely to complete projects after we engage with customers at their place of business.
 - c. With the focus on better serving the needs of our businesses, we have collaborated closely with business associations, Energy Trust and internal groups to start building a customer-focused narrative and data set.
 - d. We have found that by showing up with bigger activations where customers already are, for example the NW Food Show, we are able to reach more customers and be more efficient with the outreach we're doing. We can tailor the communications more effectively to the audience and make it easier for customers to go from consideration to project completion.



2. Areas of Success:

- a. In Q3 2021 Energy Trust launched their new Brighter Business program offering free lighting upgrades to small businesses with a focus on women and minority owned customers. PGE and Energy Trust increased collaboration in 2022 resulting in 360 leads to the Brighter Business program in 2023.
- b. PGE previously offered translation services over the phone for non-English speaking customers. In 2022 PGE offered onsite consultations in Spanish. PGE also began marketing in Spanish resulting in an entire experience in the customers' preferred or only language. Energy Trust also created program participation forms in Spanish and provided Spanish-speaking program contacts to complete the entire experienced in Spanish. Our partnership was very successful and resulted in program participation that otherwise would have never occurred. PGE also focused on phone and door-to-door canvassing in areas with a high percentage of Spanish speaking business customers. In addition to conducting canvassing independently, PGE partnered with Energy Trust Spanish speaking staffer to conduct joint canvassing.
- 3. Opportunities and Areas of Improvement:
 - a. PGE is looking forward to collaborating with Energy Trust on their pilot program to provide increased incentives for non-lighting measures for small business customers in 2023. We expect this partnership will result in increased participation in Energy Trust programs similar to how we work together supporting the Brighter Business lighting program.
 - b. PGE's Energy Partner demand response program offers a smart thermostat for business customers. Under an Energy Trust pilot through 2021, Energy Trust and PGE cost shared the installation of thermostats. Energy Trust recently completed its evaluation of the pilot to determine energy savings associated with smart thermostats and found significant savings. The ability to continue our partnership in 2023 would be beneficial for our respective programs.
 - c. In 2023, we are working with PGE's eight business resource groups to help us better reach minority-owned, regionally diverse businesses served by PGE. By tapping into the employee groups, we can help strengthen PGE's commitment to diversity, equity and inclusion by delivering energy-efficient solutions to a more inclusive group of customers who may have previously been underserved.

