

May 15, 2014

***VIA ELECTRONIC FILING  
AND OVERNIGHT DELIVERY***

Oregon Public Utility Commission  
3930 Fairview Industrial Drive SE  
Salem, OR 97302-1166

Attn: Filing Center

**RE: 2013 Customer Communication and Outreach Report to the Energy Trust**

Enclosed for filing by PacifiCorp d/b/a Pacific Power (PacifiCorp or Company) is the 2013 Customer Communication and Outreach Report to the Energy Trust of Oregon (Energy Trust). This report is submitted to the Oregon Public Utility Commission at the request of Commission staff.

Portland General Electric Company, Energy Trust and Pacific Power submitted a joint memorandum to the Commission on August 19, 2013, that provided a plan for ongoing evaluation and reporting to the Commission the impact and efficacy of the utility SB 838 customer communication and outreach activities in support of Energy Trust programs for customers. In the plan, the Company agreed to provide a report summarizing the customer communication and outreach activities funded by SB 838 and Pacific Power and a summary of the Pacific Power customer communication and outreach programs funded by the Energy Trust. These programs are designed to increase general awareness and participation in energy efficiency programs available to customers. The Company agreed to file the report with the Commission on May 15<sup>th</sup> of each year to accommodate Energy Trust's annual reporting schedule. The August 19, 2013 memorandum is provided as Attachment A to this filing.

Informal inquiries on this filing may be directed to Natasha Siores, Director, Regulatory Affairs and Revenue Requirement at (503) 813-6583.

Sincerely,

  
R. Bryce Dalley  
Vice President, Regulation

Enclosures

Attachment A – August 19, 2013 Memorandum to Commission

CC: Juliet Johnson ([Juliet.johnson@state.or.us](mailto:Juliet.johnson@state.or.us))

CC: Kay Barnes ([Kay.barnes@state.or.us](mailto:Kay.barnes@state.or.us))

## 2013 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 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.

### Communications and Outreach Approach

With more than 100 years of service, Pacific Power has strong top-of-mind awareness among our customers (98%), and they look to their electric utility to educate them on managing their energy use and to provide them with energy efficiency resources<sup>1</sup>. Pacific Power utilizes 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.

We have focused on educating customers outside of the Portland area on Energy Trust programs and incentives. Before the establishment of the SB 838 funding, much of the communications and outreach dollars associated with the Energy Trust was focused on the Portland designated marketing area (DMA). The SB 838 funds now allow Pacific Power to reach a broader 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.

While the communications program is broad, the outreach component of Pacific Power's plan is direct and allows the utility to foster conversations, particularly outside the Portland DMA 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. To accomplish the best results, the communications teams from both organizations meet on a regular basis to review opportunities and to provide input on plans.

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<sup>1</sup> As found in Pacific Power's annual Customer Awareness survey and MSI residential customer satisfaction survey.

After final budget determination by Energy Trust, Pacific Power's team provides an annual communications and outreach plan to Energy Trust each fall (before the start of the new year) outlining objectives, strategies, messages and media plan.

After review and discussion, 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 program information by Energy Trust, outside of the SB 838 budget. These requests are accommodated and help to build a larger overall plan of communicating energy efficiency programs to Oregon customers.

Pacific Power and Energy Trust communications teams meet quarterly to review the upcoming plans for the quarter and make any necessary adjustments. Communications staff meet as needed and confer by phone and email on work in progress and new developments between quarterly collaboration meetings. An Energy Trust staff representative also regularly attends a portion of Pacific Power's internal weekly communications meetings to touch base and receive updates on project activities for the week.

#### *Communication Objective*

- Increase overall awareness of and regional participation in Energy Trust incentive programs and services by Pacific Power residential and small and mid-size business customers.

#### *Communication Strategies*

- Focus communications primarily in southern, central and mid-Willamette Valley Oregon to reach concentrated and highly populated markets; 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 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, direct mail, social media, email, etc.
- 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 community relations managers (RCMs) and corporate account managers (CAMs).

#### *Key message*

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

**Summary of 838-funded communications and outreach activities**

See Appendix A for activity details

Communication Tactic	Description	2013 Results / Impressions / Approximate Quantities
TV, radio, print and outdoor advertising	<ul style="list-style-type: none"> <li>TV, radio, print advertising in southern Oregon, central Oregon and mid-Willamette Valley, some outdoor advertising placements in NE Portland</li> <li>Focus of the campaign is energy efficiency with specific references to Energy Trust incentives, Energy Saver Kits, Home Energy Review and refrigerator recycling</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</li> </ul>	Impressions: TV 23,745,513 Radio 2,151,719 Print 979,752 Digital 9,533,130 Outdoor 5,851,466 <b>TOTAL 42,261,580</b>
Business print ads	<ul style="list-style-type: none"> <li>Ads typically feature a customer that has upgraded equipment and refer customers to Energy Trust incentives and services for businesses</li> <li>Cascade Business Book of Lists, Bend Chamber Business Journal, Coast River Business Journal, Oregon Business Magazine, Oregon Facilities and Oregon Business Power Book</li> </ul>	
Trailblazers radio sponsorship	<ul style="list-style-type: none"> <li>Pre-game show, play-by-play per game, post-game show, billboard in each Courtside talk show broadcast on KPOJ-AM (82 games)</li> <li>Sponsorship of Trailblazers Courtside, weekly on KEX 1190AM and Comcast SportsNet Northwest</li> </ul>	
Digital advertising	Banner ads on local media sites, blogs, behavioral ad targeting and pay-per-click ad placements	
Public Relations	Capitalize on existing assets and tools to deploy news media outreach and consumer engagement efforts that are aligned with communications and outreach objectives Example press releases issued in 2013: <ul style="list-style-type: none"> <li>Free Energy Efficiency Workshops in June Show How to Save Kilowatts and Cash - June 13, 2013</li> <li>Warmth, Energy Efficiency Shouldn't Go Out the Window When Temperatures Drop - Dec. 2, 2013</li> </ul>	
Workshops and Events	<ul style="list-style-type: none"> <li>Residential workshops and sponsored events throughout the state. These were promoted through direct mail, email, website, press release and social media.</li> <li>Commercial workshops and sponsored events throughout the state. These were promoted through direct contact with the host, i.e. Chamber of Commerce, economic development groups</li> <li>Promotion support for “Lighten Up with LEDs”</li> </ul>	40,000 residential mailings  7,500 commercial mailings  2,600 commercial / industrial mailings

	<p>Energy Trust event in Albany, Bend, Corvallis, Grants Pass, Medford, Pendleton and Redmond.</p> <ul style="list-style-type: none"> <li>• Promotion support for “Take Control of Your Energy Costs” Energy Trust event in Medford</li> <li>• Industrial energy efficiency workshop support for NEEA in Medford, Portland, and Roseburg</li> </ul>	<p>6,909 residential participants / attendees</p> <p>3,367 commercial and industrial participants / attendees</p>
Historic Preservation & Energy Efficiency booklet	Historic Preservation & Energy Efficiency booklet developed in partnership with Energy Trust, Clatsop Community College and Oregon Main Street. The guide was recognized at the Oregon Main Street Annual Meeting in Astoria in October 2013 and has been distributed to customers and at events.	

### *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 regions are identified in Appendix B

<b>2013 Non-RES Activity</b>	<b>So. OR</b>	<b>Klamath</b>	<b>Central OR</b>	<b>Mid-Will</b>	<b>NW Oregon</b>	<b>Eastern OR</b>	<b>PDX</b>	<b>Year End</b>	<b>Goal</b>
Presentations / Events	17	4	5	15	5	5	5	56	43
Attendees / Contacts	954	728	500	3,399	372	271	4,967	11,191	4,264
Warm Leads	135	16	64	112	31	30	56	444	353

### *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 RCMs and CAMs, participates in Energy Trust communications and program collaboration meetings, coordinates on-bill repayment activities through EEAST and other programs, coordinated utility data transfers, develops regular and ad hoc data, activity and financial reporting, and supports other projects as they arise, such as “Cool Schools,” Lloyd EcoDistrict, and community generated activities.

### Summary of Pacific Power-funded communications and outreach activities

See Appendix A for activity details

Communication Tactic	Description	2013 Results/ Approximate Quantities
<i>Voices</i> residential customer newsletter	Energy Trust incentives and services mentioned in all six Pacific Power newsletters per year; distributed through bills and through email. Newsletter content developed collaboratively with Energy Trust.	2.1 million inserts  690,000 emails
<i>Wattsup</i> residential customer inserts	Inserts dedicated to energy efficiency tips and Energy Trust programs/incentives in May and October each year. Newsletter content developed collaboratively with Energy Trust.	700,000 inserts
<i>Energy Insights</i> newsletter to industrial customers and community leaders	Quarterly stories featuring Pacific Power large commercial or industrial customers who have participated in Energy Trust programs to upgrade lighting, HVAC and other equipment; distributed through direct mail and email. Newsletter content developed collaboratively with Energy Trust.	2,800 newsletters
<i>Energy connections</i> newsletter to mid-size businesses	Quarterly stories featuring Pacific Power mid-size business customers who have participated in Energy Trust programs to upgrade lighting, HVAC and other equipment. Newsletter content developed collaboratively with Energy Trust.	30,000 newsletters
Data transfer bill insert	Provided a notification of the rule change for the customer data transfer in March bills	465,000 inserts
New customer mailings	Mailings to new customers mention Energy Trust services and incentives, as well as the data transfer	40,000 mailings
Web	<ul style="list-style-type: none"> <li>• pacificpower.net/wattsmart, and promotional URL bewattsmart.com link directly to Energy Trust's website</li> <li>• Energy efficiency messages on the Pacific Power homepage throughout the year</li> </ul>	38,800 visits  7,299 click-thrus (20 average daily referrals to Energy Trust's website (6% of total referral traffic))
Twitter @PacificPower_OR	Tweets several times per week, some promote energy efficiency and Energy Trust incentives/services	1,326 followers
Facebook	Information and tips posted three times a week. Ongoing campaign to increase the number of individuals and businesses we communicate with via Facebook	1,667 fans

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

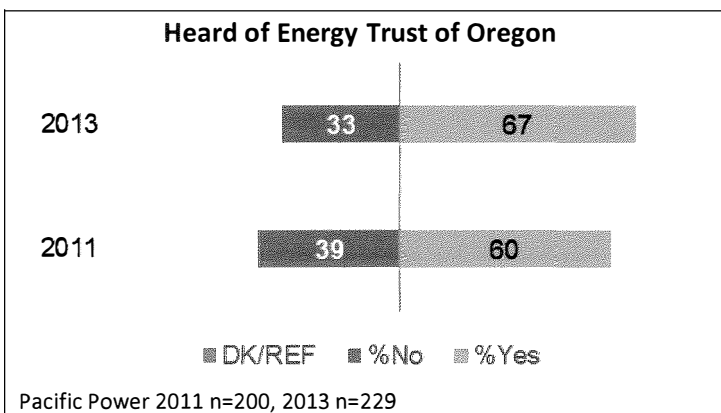
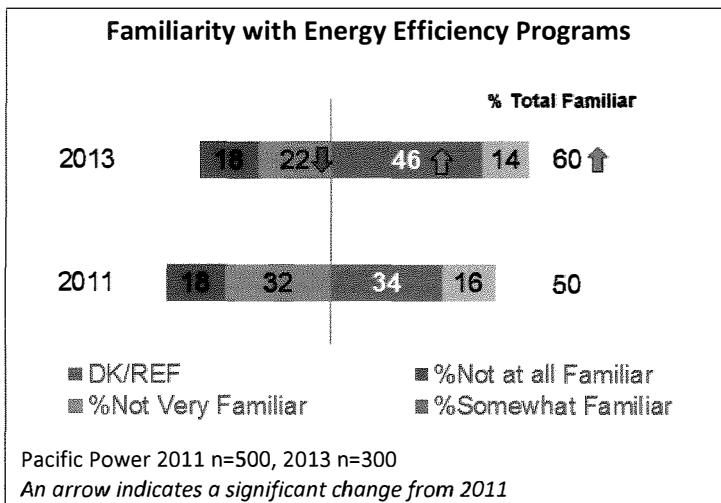
See Appendix A for activity details

<b>Communication Tactic</b>	<b>Description</b>	<b>2013 Results/ Approximate Quantities</b>
Bill inserts in Pacific Power bills	4-5 inserts per year to promote Energy Trust residential incentives/services, heat pumps, solar water heaters and weatherization; inserts also posted online for customers who receive paperless billing	1.4 million inserts
Personal Energy Reports to Pacific Power customers	Pilot launched in August 2013 and provides energy usage insights and tips mailed to targeted customers every other month in cooperation with Energy Trust	50,000 reports mailed

**Outcomes: Overall awareness improvement**

Pacific Power performs annual residential customer satisfaction and communications awareness studies. In May 2013, Customer Awareness Survey results indicate customer awareness of energy efficiency programs and Energy Trust is increasing. In 2011, 52% of customers were aware of Energy Trust; however, that number increased to 62% in 2013.

This finding was supported in the MSI residential customer satisfaction survey, which took place June 7-25, 2013. Telephone interviews were conducted among a random sample of 300 Pacific Power residential customers (229 in Oregon, 52 in Washington, and 19 in California). 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. Familiarity with energy efficiency programs and Energy Trust increased.





**Outcomes: Increased regional participation – unique sites served**

Utilizing data received from Energy Trust through the improved data transfer process, results indicate that Pacific Power's primary communications and outreach target areas are seeing steady increases in the amount of unique sites installing Energy Trust qualified measures.

Pacific Power regions are identified in Appendix B

<b>Unique Sites Served 2008 - 2013</b>	<b>Southern OR</b>	<b>Klamath</b>	<b>Central OR</b>	<b>Mid-Willamette</b>	<b>NW Oregon</b>	<b>Eastern OR</b>	<b>Portland</b>
Pacific Power 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%

**Outcomes: Increased regional participation – measures installed**

Utilizing data received from Energy Trust through the improved data transfer process, results indicate that Pacific Power's primary communications and outreach target areas are seeing steady increases in the quantity of Energy Trust qualified measures installed.

Pacific Power regions are identified in Appendix B

<b>Measures Installed 2008 - 2013</b>	<b>Southern OR</b>	<b>Klamath</b>	<b>Central OR</b>	<b>Mid-Willamette</b>	<b>NW Oregon</b>	<b>Eastern OR</b>	<b>Portland</b>
Pacific Power 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%

## Conclusion and Opportunities

**General Awareness:** As noted from Pacific Power's 2013 residential customer satisfaction study, about 60% of Pacific Power residential customers have familiarity with the energy efficiency programs that are available to them. These rates are higher than those observed in 2011, indicating that awareness and action have both increased. However, opportunities still exist to increase awareness of programs that can help customers manage energy more efficiently as well as control costs, which will continue to be important given potential concerns about rates and prices for the foreseeable future<sup>2</sup>.

**Regional Participation:** As determined from Energy Trust data, customer participation in Pacific Power's targeted regions continues to improve by focusing heavily on southern, central and rural Oregon. While southern and central Oregon show strong and equitable performance compared to customer density, additional focus opportunities are present in areas of eastern and northwest Oregon and Klamath County.

**Pacific Power Support:** There is a strong correlation between one-on-one support and customer participation for non-residential customers. Pacific Power representatives meet regularly with managed accounts and community contacts, and the company and its employees are involved in local community organizations and events. Customer projects have been realized from Pacific Power coordinated events, connections through Chambers of Commerce and economic development groups, and managed accounts. Pacific Power will continue to utilize and expand these relationships and will seek additional support from Energy Trust regional contacts.

**Meet-and-Greet:** Staffing changes and organizational restructures warrant a renewed focus on "who does what" within Pacific Power, Energy Trust and program delivery/management contractors. Over time, as staff change, it is important to ensure that when customers have questions they are forwarded to the most knowledgeable person within the respective organizations to ensure a timely and seamless hand off.

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<sup>2</sup> As found in Pacific Power's annual Customer Awareness survey and MSI residential customer satisfaction survey.

**APPENDIX A: 2013 Year End Activities Report for Energy Trust****Pacific Power / Energy Trust Q1 – Q4 Report - 2013**

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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>3</sup>

**In the media****TV - Bend, Medford, Eugene and Albany/Corvallis DMAs, Portland Cable**

- **Q1**
  - “Motel”
  - “Little Hero”
  - “Porch Light”
  - “Small Changes”
  - “Sweet Savings”
- **Q2**
  - “Contractor-Energy Trust” / Energy Trust
  - “Cookies” / Energy Trust
  - “Motel” / Energy Trust
  - “Little Hero” / Energy Trust
  - “Porch Light” / Energy Trust
  - “Remodel your energy bill” /Energy Trust
  - “Small Changes”
- **Q3**
  - “Contractor” / Energy Trust
  - “Cookies” / Energy Trust
  - “Motel” / Energy Trust
  - “Little Hero” / Energy Trust
  - “Porch Light” / Energy Trust
  - “Small Changes” / Energy Trust
- **Q4**
  - “Contractor” / Energy Trust
  - “Motel” / Energy Trust
  - “Little Hero” / Energy Trust
  - “Porch Light” / Energy Trust
  - “Remodel your energy bill” /Energy Trust

**Radio – Bend, Eugene and Medford DMAs**

- **Q1**
  - “Jess Conserve Energy Answers”
  - “Teamwork” / Energy Trust, Trailblazers
  - “Phil Answers – Energy Efficiency”
  - “Lori Answers – Energy Efficiency”
- **Q2**
  - “ETO Home Energy Review” / Energy Trust

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<sup>3</sup> Some activities are funded outside of SB 838 funds.

- **Q3**
  - “Home review song” / Energy Trust
  - “Upgrade song” / Energy Trust
- **Q4**
  - “Home review song” / Energy Trust
  - “Upgrade song” / Energy Trust
  - “Lighting song”/Energy Trust
  - “Teamwork” / Energy Trust, Trailblazers

#### Print

- **Q1**
  - “Grants Pass Chamber Directory” ad
  - “Medford Chamber Membership Guide” ad / Energy Trust
  - “Pendleton Chamber Economic Outlook Luncheon” ad / Energy Trust
  - “Cottage Grove Community Guidebook” ad
- **Q2**
  - “Home Energy Review” ad / Energy Trust
  - “City of Bend energy efficiency project” / Energy Trust
  - “Corvallis Knights Baseball” ad
  - “Takena Kiwanis Track Meet” ad
  - “Deschutes Library energy efficiency project” ad / Energy Trust
  - “Boys & Girls Club of Greater Santiam”
  - “Boys & Girls Club of Albany”
  - “Upper Rogue Independent Destination magazine” ad
- **Q3**
  - “Oregon Jamboree” ad
  - “Ross Ragland Theater” ad
  - “Polk County Festival” ad
  - “Outlet house/lighting” ad / Energy Trust
  - “City of Bend” / Energy Trust
  - “Historic Preservation & Energy Efficiency” ad
  - “Lebanon Chamber directory” ad
- **Q4**
  - “City of Bend” / Energy Trust
  - “Historic Preservation & Energy Efficiency” ad
  - “Outlet house/lighting” ad / Energy Trust

#### Outdoor

- **Q1**
- **Q2**
  - “Outlet House Poster”
  - “Outlet House Bulletin”
- **Q3**
- **Q4**

#### In customer bills

##### Voices residential newsletter

- **Q1**
  - Resolve to get the most for your money

- Just a few dollars powers your day
- Save with cash back incentives / Energy Trust
- Spruce up your savings / Energy Trust
- Efficient new homes / Energy Trust
- **Q2**
  - Respect goes a long way / Energy Trust
  - Free Energy Saver Kit / Energy Trust
- **Q3**
  - Stay cool with an extra \$140 per year / Energy Trust
  - Be a smart homebuyer / Energy Trust
  - One cool move gets you \$40 / Energy Trust
  - Weatherize and save / Energy Trust
- **Q4**
  - Bright savings for your home / Energy Trust
  - Keep your holidays bright

#### Bill inserts

- **Q1**
  - The weather outside is frightful, but the cash incentives are delightful / Energy Trust
  - How comfortable are you with saving money? / Energy Trust
  - Keeping you informed: Changes to how Pacific Power shares information with Energy Trust of Oregon / Energy Trust
- **Q2**
  - “*wattsup*” / Energy Trust
- **Q3**
  - “Now you can bathe in the sun’s warmth ” / Energy Trust
  - “Warm up to savings this fall” / Energy Trust
- **Q4**
  - “*wattsup*” / Energy Trust

#### Outbound Envelope

- **Q1**
- **Q2**
  - “Be *wattsmart* – save energy and money”
- **Q3**
- **Q4**

#### In the mail

##### Direct mail

- **Q1**
- **Q2**
  - Clean Energy Works Oregon letters
    - Central Oregon, Southern Oregon, Portland, Marion & Polk Counties
  - Be *wattsmart* Workshop invitations / Energy Trust
    - Bend & Redmond, Dallas, Grants Pass & Medford, Klamath Falls, Stayton
- **Q3**
  - Personal Energy Reports
  - Personal Energy Report welcome insert

- Industrial LED Lighting invitations
  - Medford
- Lighten up with LEDs invitations
  - Bend, Redmond, Grants Pass, Medford
- Q4

#### On the web

##### **Voices residential e-newsletter**

- Q1
  - Just a few dollars powers your day
  - Save with cash-back incentives / Energy Trust
  - Spruce up your savings / Energy Trust
  - Efficient new homes / Energy Trust
- Q2
  - Ready, set, save this summer / Energy Trust
  - Respect goes a long way
  - Fill a fridge by recycling yours / Energy Trust
- Q3
  - Cool ways to beat the heat / Energy Trust
  - Be a smart homebuyer / Energy Trust
- Q4
  - Cool ways to beat the heat / Energy Trust
  - Be a smart homebuyer / Energy Trust

##### **Energy Connections mid-size business e-newsletter**

- Q1
  - Energy-Saving Resolutions for 2013
  - The Impact of Federal Lighting Legislation on Your Facility
  - Conducting Your Own Energy Audit
  - LEDs Add Shine to Auto Dealership / Energy Trust
  - Advanced Power Strips: A Smarter Way to Save
  - Spring Clean Your Facility
- Q2
  - Ask an Expert: Improving HVAC System Performance
  - Save Now: Eight **wattsmart** Ways to Reduce Energy Use
  - Five Steps to Saving Energy this Summer
  - Learn the ABCs of LEDs
  - City Lights Up Big Savings / Energy Trust
  - Lighting Retrofits: Comparing T8 and T5 Fluorescent Lamps
  - Heats Up on Cooling System Upgrades
- Q3
  - Lower Your Cooling Costs: Five Effective Strategies
  - Preventive Maintenance Checklist for Air Conditioning Systems
  - Stay Cool and Save at Home This Summer
  - Circulating Fans Save Energy
  - ENERGY STAR: Resources for Your Business
  - The Latest in Lighting Technologies and Trends
  - Be **Wattsmart** with Building Maintenance
  - Medical Lab Puts Energy Use to the Test

- **Q4**
  - Newer Generation T8 Lamps Focus on Efficiency and Performance
  - Easy and Affordable Energy Management Technology
  - Ten Ways to Improve Heating System Performance
  - Improve Your Heating System Efficiency
  - Compare the Energy Costs of Holiday Lighting
  - Getting it Right: Your Next Energy Upgrade
  - Ask an Expert: Temperature Setback Energy Savings
  - Making Energy Efficiency a Key Ingredient

***Energy Update managed accounts and opinion leaders e-newsletter***

- **Q1**
  - The Impact of Federal Lighting Legislation on Your Facility
  - Minimizing Heat Loss: Warehouse Facilities
  - Controlling Energy Costs in Manufacturing Facilities
  - Advanced Power Strips: A Smarter Way to Save
  - Powerful Data for Managing Energy Use
  - Spring Clean Your Facility
  - Ask an Expert: Trends in Lighting Controls
- **Q2**
  - Ask an Expert: Improving HVAC System Performance
  - Benchmarking Helps Save Energy, Study Shows
  - Stay Cool with HVAC Economizers
  - Learn the ABCs of LEDs
  - Stepping Up to the Plate: Baseball Clubs Go Green
  - Lighting Retrofits: Comparing T8 and T5 Fluorescent Lamps
- **Q3**
  - Energy Management Systems: Putting You in Control
  - HVAC Systems: Saving Energy at the Zone Level
  - Go With the Flow: Circulating Fans Save Energy
  - The Latest in Lighting Technologies and Trends
  - HVAC Upgrades: Be Sure Your System Measures Up
  - Wireless Technology Improves the Efficiency of Pneumatic Thermostats

***Energy Insights large C&I / communities newsletter***

- **Q1**
  - Electricity: What's ahead for customers
  - Cabinet maker cuts energy waste / Energy Trust
- **Q2**
  - Balancing energy needs with the environment
  - Energy efficiency powers Oregon sawmill
- **Q3**
  - Harry & David order up savings / Energy Trust
  - Save on cooling system upgrades / Energy Trust
- **Q4**
  - Oregon sawmill reaps energy cost savings / Energy Trust
  - Historic preservation can be **wattsmart** / Energy Trust

**Direct email**

- Q1
- Q2
  - Be **wattsmart** Workshop invitations
    - Bend, Redmond, Dallas, Grants Pass & Medford, Klamath Falls, Stayton
- Q3
  - Lighten up with LEDs invitations
    - Bend, Redmond, Grants Pass, Medford, Pendleton, Albany, Corvallis

**Online Media**

- Q1
- Q2
  - “Home Energy Review” / Energy Trust
  - “ETO Block” / Energy Trust
- Q3
  - “ETO Block/outlet house” / Energy Trust
  - “Energy Savers Kit / Energy Trust
  - “Home Energy Review” / Energy Trust
- Q4
  - “ETO Block” / Energy Trust
  - “ETO Energy Saver Kit” / Energy Trust

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

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

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

- Q1
- Q2
  - “Oregon Conservation Report” / Energy Trust
  - “Summer **wattsmart** handout” / Energy Trust
- Q3
  - “Summer **wattsmart** handout” / Energy Trust
- Q4
  - “Winter **wattsmart** handout” / Energy Trust

**Outreach****Chambers of Commerce, Business and Community outreach: Q1 – Q4**

Pacific Power continues to host and participate in multiple energy efficiency focused meetings with business and community leaders across the state utilizing existing relationships with local Chambers of Commerce and economic development groups. These presentations focus on small- to mid-size commercial customers and how they can improve energy efficiency. Energy efficiency presentations and event participation occurred in Albany, Astoria, Bend, Coos Bay (2), Corvallis (3), Cottage Grove (2), Grants Pass (3), Independence, Junction



City, Klamath Falls, Lebanon, McMinnville, Medford (6), Pendleton (2), Portland (3), Redmond (2), Roseburg (3), Seaside, Sprague River, Stayton, Wallowa, Warrenton (2), and Wolf Creek, 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. We 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. (Utilizing Energy Trust's "Do it yourself" energy audit)
- Additional support for on-site assistance from Energy Trust of Oregon and local contractors.
- Regular checkups with Pacific Power on recommended energy saving improvements.

#### **Be *watt*smart Workshops: Q1 – Q4**

Pacific Power produced and delivered another successful round of Be *watt*smart Workshops. The workshops were targeted to Clean Energy Works Oregon eligible homeowners to educate them on how to manage energy use and improve energy efficiency. Additional residential customer outreach was performed throughout Oregon through local events. Locations included Albany, Bend, Dallas, Grants Pass, Klamath Falls (2), Medford, Portland (2), Redmond, and Stayton, Oregon. Sessions were presented by Pacific Power.

#### **Mass Media<sup>4</sup>**

	2013 – Impressions (Q1-Q4)
TV	23,745,513
Radio	2,151,719
Print	979,752
Outdoor	5,851,466
Digital	9,533,130
TOTAL	42,261,580

<sup>4</sup> SB 838 funded mass media only.

**Outreach**

Locations	Chambers of Commerce, business / community groups / conferences (2013)	Be <i>wattsmart</i> / other residential (2013)	TOTAL (Q1-Q4)
Albany	10	450	460
Astoria	200		200
Bend	10	39	49
Coos Bay	60		60
Corvallis	859		859
Cottage Grove	320		320
Dallas		36	36
Grants Pass	155	85	240
Independence	30		30
Junction City	30		30
Klamath Falls	12	650	662
Lebanon	50	1,000	1,050
McMinnville	30		30
Medford	178	85	263
Pendleton	180		180
Portland	383	4,500	4,883
Redmond	308	39	347
Roseburg	38		38
Seaside	35		35
Sprague River	30		30
Stayton	317	25	342
Wallowa	15		15
Warrenton	100		100
Wolf Creek	17		17
<b>TOTAL</b>	<b>3,367</b>	<b>6,909</b>	<b>10,276</b>

**“Warm Leads” / Customer Response**

	2013 (Q1-Q4)
“Warm Leads” provided to Energy Trust	444
Small to Mid-Size Commercial Consultations	904

**Other Energy Efficiency Coordination / Support**

- Internal Pacific Power support for Energy Trust programs
- Weekly / Monthly / Quarterly Energy Trust coordination meetings
- Energy Trust Conservation Advisory Council
- EEAST implementation
- On-Bill Financing support
- CEWO implementation, contracting, support
- Energy Trust / Utility Data Transfer coordination
- Opower pilot
- 1aMW / Self Direct reconciliation
- Lloyd EcoDistrict

**APPENDIX B: Pacific Power Oregon Regions****Southern OR**

Applegate	Coos Bay	Idleld 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**

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

**Central OR**

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

**Mid-Willamette**

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

**NW 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 OR**

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

# Attachment A

August 19, 2013 Memorandum

## Memo

To: Juliet Johnson, Oregon Public Utility Commission  
From: Steve Lacey, Energy Trust of Oregon  
Lauren Shapton, PGE  
Kari Greer, Pacific Power  
Subject: Evaluation & Reporting Plan for Utility 838-Funded Marketing/Outreach  
Date: August 19, 2013

PGE, Pacific Power, and Energy Trust have developed a plan for ongoing evaluation and reporting to the OPUC on the impact and efficacy of the utility 838 marketing and outreach activities in support of Energy Trust programs for customers.

We continue to observe the following:

- The intention of utility 838-funding marketing and outreach activities is to build customer awareness of energy efficiency opportunities and specific Energy Trust offers and services, with a call to action that links customers in Energy Trust programs and services. The focus of utility marketing and outreach activities is to target harder to reach markets prioritized through utility SB 838-funded activities.
- PGE and Pacific Power develop annual plans for 838 marketing and outreach activities with input from Energy Trust of Oregon. Each utility coordinates with Energy Trust during the year to implement planned activities. The coordination and timing of joint marketing and outreach efforts needs to be informed by progress toward goals and customer demand. The parties work together to adjust plans as needed to manage project volume, move demand up or down, and maintain excellent customer service.
- PGE and Pacific Power currently submit quarterly reports to the OPUC as appendices to Energy Trust regular quarterly reports. These reports highlight the communications and outreach activities used to grow awareness of and engage customers in Energy Trust program offers. Currently, Energy Trust highlights outcomes of joint direct marketing activities with utilities where program activity trends and/or direct response mechanisms allow for these insights. Reporting could be restructured to better highlight: annual plan goals and objectives, coordination between each utility and Energy Trust including adjustments made to plans, and progress toward annual plan goals in terms of customers reached with information and customers engaged in program offers. Data sharing and Energy Trust Customer Relationship Management (CRM) system enhancements currently in development will also improve results reporting in the future.
- There is value in the coordination, evaluation and reporting on these joint activities so that successes can be noted and leveraged, refinements can be made, and new opportunities can be identified. These activities are part of the cycle of refinement and accountability for all Energy Trust programs.
- Impacts of marketing and outreach can never be fully understood: customers may be inspired but take action months or years later, customers may pass on information to other customers who take action, etc.

We also agree to utilize the following two mechanisms for ongoing evaluation and reporting out:

- For Energy Trust program process evaluations, Energy Trust will incorporate utility marketing and outreach and coordination within the evaluation scope, treating utility inputs just as it does program inputs. This will provide a full and fair representation of utility-coordinated efforts on an equal basis with Energy Trust program efforts. These process evaluations will be conducted on regular program evaluation cycles. Energy Trust will no longer commission evaluation reports specific to SB 838 utility supplemental funding activities.
- Annually, each utility will submit a report, working with input from Energy Trust, summarizing the following:
  - Annual marketing outreach plan and objectives
  - Activities undertaken to expand and reinforce customer awareness of energy efficiency opportunities and Energy Trust programs
  - Activities undertaken to engage customers in Energy Trust programs and offers
  - Highlights of utility/Energy Trust collaborative process in plan development, mid-year adjustment (if needed), and activity implementation
  - Impact of activities in terms of:
    - Customers contacted—impressions from awareness communications and customers reached through outreach activities; and
    - Customers engaged in Energy Trust program offers—number of customers responding to utility promotion of a program offer, and number of customers contacted through outreach that are subsequently participating in Energy Trust programs (where identifiable)
  - Any additional indicators of impact from Energy Trust program activity trends, market research, evaluations or other sources
  - Learnings and recommendations
- Annually, each utility will make a joint presentation with Energy Trust to the Oregon Public Utility Commission highlighting areas of focus and collaboration, and noting progress toward joint goals of building awareness and engaging customers in Energy Trust programs, and recommendations for future efforts. The optimal timing for these joint presentations would be following Energy Trust's presentation of its annual report to the commission.

We have agreed to the following implementation schedule:

- Energy Trust will begin incorporating utility activities into relevant program evaluations from here forward. As a follow up to recent discussions, Energy Trust has committed to provide additional information to each utility about data typically collected for program evaluation purposes so the utilities can better anticipate how they will be tapped and what information may be requested.
- PGE and Pacific Power will complete the first annual reports of activity in 2013 to the OPUC in 2014, utilizing input from and coordinating with Energy Trust. We propose a due date of May 15 to accommodate Energy Trust's busy year-end and annual reporting schedule, which lasts through April 15. We propose that PGE and Pacific Power attend Energy Trust's annual report presentation to the OPUC, which typically occurs in May, to highlight information submitted in their reports.

- PGE and Pacific Power propose to continue quarterly reporting in a streamlined manner, using Energy Trust quarterly OPUC reports as the submission vehicle, through the end of 2013. Starting in 2014, PGE and Pacific Power will transition completely to an annual report schedule. Energy Trust will continue to call out significant joint collaboration results in regular quarterly report highlights.

We have provided additional detail regarding the program evaluation approach and a draft outline for future utility reports below.

## **Program Evaluation Approach**

### **Utility and Energy Trust Cooperative Activity Evaluation Framework**

If Energy Trust and Utilities are actively working together to support a specific Energy Trust program/initiative, a component will be included in process evaluations that review and analyze this working relationship. Tasks will include:

**Review of documents and data:** Evaluation contractor will collect and review documents, memos, and meeting minutes etc. that describe and document the cooperative activities that have been implemented and planned during the study period. Activities completed per utility annual plans will also be reviewed and analyzed.

**Interviews:** Utility staff and Energy Trust program staff will be interviewed on:

- Scope and expected outcomes of these activities
- Progress towards activities' goals
- Communications and coordination of activities
- Suggestions for changes, additions or improvements to the cooperative planning and implementation processes

**Reporting:** The document and data review as well as the interview analysis will be included as a section in the process evaluation report.

## **Proposed Content Outline for PGE and Pacific Power Annual Marketing Report & Presentation with Energy Trust to OPUC**

### **Brief Introduction**

- 1) Summarize philosophy and approach of Energy Trust portfolio-wide program marketing efforts.
- 2) Summarize purpose of utility efforts to engage customers in Energy Trust programs
  - Identify sectors/programs where 838 investments are being made
- 3) Summarize the annual marketing and outreach approach for joint activities
  - PGE 838 strategy/approach per annual plan
  - Pacific Power 838 strategy/approach per annual plan

### **Summary of Marketing Activities**

- 3) Summarize the annual collaboration process between utilities and Energy Trust
  - How targets were identified for utility 838 and Energy Trust marketing activities

- How utility 838 funded messages/content were reviewed and approved
  - How timing and utility 838 funded support activities were determined
- 4) Expectations & Goals
- Identify high level goals for marketing activities
    - i. Awareness of Energy Trust programs – via utility 838 funded impressions through media and direct communications to customers
    - ii. Customer engagement – via utility 838 funded workshops, uptake in program offers, etc.
  - Identify any planned joint initiatives (such as direct mail) with specific goals
- 5) Summarize marketing and outreach activities, highlighting utility 838 funded activities and Energy Trust coordination found to be particularly successful
- Direct customer communications: bill inserts, direct mail, direct email
  - Outreach events/workshops
  - Mass media
  - Program support activities: trainings for contractors, Aclara, etc.
  - Cost breakdown

## Impact

- 6) Speak to key indicators of efficacy
- a. Customers contacted: Number of customers contacted by utilities with information about Energy Trust programs and services
    - Mass marketing impressions
    - Bill communications
    - Invitations to workshops/events
    - Other
  - b. Customers engaged: Direct customer involvement in utility outreach efforts promoting Energy Trust offers and services
    - Number of attendees at workshops/events promoting Energy Trust program offers
      - Workshop attendees requesting program services
    - Customers contacted through utility outreach efforts
      - Number of customers referred to program through utility outreach
    - Results from Energy Trust commercial sector lead conversion reports indicated projects completed by customers referred through utility outreach
    - Results from utility direct mail as observed by Energy Trust in program activity trends (when available)
    - Future potential: Program activity generated from joint utility promotions – tracked via custom URL and promotion codes (when available)
    - Other
  - c. Learnings from Evaluations
    - Identify completed Energy Trust program evaluations that covered programs supported by utility 838 outreach and marketing
    - Summarize any relevant findings regarding marketing/outreach support for programs
  - d. Other potential indicators, as available from Energy Trust or Utility sources
    - Web site traffic trends and referrals
    - General awareness research



- Utility customer surveys
- Call center metrics – warm transfers and “how did you hear” tracking (when available in Energy Trust CRM)

### **Conclusion**

- 7) Summarize progress to goals and key learnings
- 8) Identify areas of success and areas for improvement