

**2011 ENERGY STAR® Award Application
 Excellence—ENERGY STAR Promotion & Partner of the Year—Energy Efficiency Program Delivery**

Energy Trust of Oregon—Narrative

Energy Trust of Oregon is an independent nonprofit organization dedicated to helping customers benefit from saving energy and tapping renewable resources. Our services, cash incentives and energy solutions have helped participating customers of Portland General Electric (PGE), Pacific Power, NW Natural and Cascade Natural Gas save nearly \$600 million on energy costs. Our work helps keep energy costs as low as possible, creates jobs and builds a sustainable energy future.

In 2010, Energy Trust continued to build on its cornerstone marketing and outreach, education, trade ally development strategy to increase contractor and consumer understanding and participation in Home Performance with ENERGY STAR. By building on these strategic marketing and investing in Energy Trust trade ally contractor development, the number of Energy Trust’s Home Performance trade ally contractors increased by 134 percent between first and third quarter 2010. Customer awareness of Energy Trust has increased to 48 percent in Oregon service territory (up 20 percent in the past two years); the ENERGY STAR® label is now recognized by 72 percent of households surveyed by Energy Trust; and overall Energy Trust program awareness has increased by seven percent in the past year.

**I. Consumer Marketing and Outreach
 Home Energy Makeover Contest**

In March 2009, Energy Trust launched the statewide Home Energy Makeover Contest. The contest demonstrated benefits of energy-saving, whole-home improvements; expanded awareness of Home Performance with ENERGY STAR; developed a database of consumers for future outreach; and positioned Energy Trust as a valuable resource for energy-saving assistance. After analyzing the energy use in thousands of homes, contest winners were selected in Portland, Bend, Salem and Medford and received a whole-home energy makeover worth up to \$25,000 each.

The results were generated in late 2010, and featured in Home Performance marketing and outreach along with contest-winner testimonials. The effectiveness of Home Performance is proven in the results from each winning home. The Portland home achieved the highest change in energy use (53 percent); the Medford home achieved the highest annual cost savings (\$1,342.73).

City	Utility	Pre-makeover energy use	Post-makeover energy use	Difference	Percent of change	Annual Savings
Portland	NW Natural	765 therms	357 therms	-408 therms	-53%	\$456.96
Bend	Cascade Natural Gas	1,208 therms	720 therms	-488 therms	-40%	\$546.56
Salem	PGE	31,936 kWh	27,998 kWh	-3,939 kWh	-12%	\$366.33
Medford	Pacific Power	38,265 kWh	23,827 kWh	-14,438 kWh	-38%	\$1,342.73

In addition, out of the 6,000 contest entrants, almost 12 percent have moved forward with installing measures and applying for incentives, resulting in:

- 1,368 total measures installed
- 290,020 total saved kWh
- 35,469 total saved therms
- 10 Home Performance jobs

About eight percent scheduled and received a Home Energy Review, Energy Trust’s free one-hour visual walkthrough and entry point into Home Performance.

Spring Home Performance with ENERGY STAR campaign

In 2010, Energy Trust featured contest winner testimonials in its multimedia Home Performance with ENERGY STAR campaign, which included:

- Utility bill inserts
- Co-branded direct mail postcards
- *Portland Monthly Magazine* “Home Energy Savings Guide” and direct mail postcard
- Local newspaper creative advertising

To make Home Performance more relatable and tangible and increase market awareness, Energy Trust featured contest winner testimonials in all components of the campaign. Strong quotes such as, “*We’ve felt a big difference in comfort—probably a 40 percent improvement. This summer, our house stayed cool, and in the winter, we didn’t feel any drafts. Plus, the house is much quieter,*” from Portland winner, Justyn Baker, explains the homeowner benefits and makes Home Performance more relatable.

In April 2010, more than one million utility-bill inserts featuring winner testimonials were sent to customers of Pacific Power (425,000 Oregon customers), NW Natural (540,000 Oregon and Washington customers) and Cascade Natural Gas (73,173 Oregon customers). Targeted customers of PGE, Pacific Power, NW Natural and Cascade Natural Gas received Home Performance-branded direct mail postcards. Homeowners were encouraged to look at energy efficiency from a different angle—the comfort level of their home.

In April 2010, approximately 170,000 readers of *Portland Monthly Magazine* received a pull-out “Home Savings Guide,” featuring Home Performance and qualified local contractors. An additional 55,000 targeted *Portland Monthly Magazine* readers received a June 2010 direct mail campaign promoting increased comfort and savings as a result of Home Performance.

Several contractors have said they’ve competitively bid Home Performance jobs due to greater consumer awareness. One Home Performance contractor said customers have been calling him just to “see what we do and what Home Performance is all about.” Another said he was able to keep his shop open as a result of increased demand.

II. Consumer Education

Home Energy I.Q. Workshops

In 2010, Home Energy I.Q. —a consumer-education series designed to teach homeowners about energy efficiency, behavior changes and tips for achieving a significant reduction in energy use—was restructured into a 2.5-hour workshop to reach a greater number of consumers throughout Oregon. To date, five Energy Trust employees have been trained to deliver the workshops in a variety of venues, including trade shows, utility co-sponsored events and corporate sustainability initiatives. A projected 1,000 homeowners will have participated in a workshop by the end of 2010.

Homeowners who attend a Home Energy I.Q. workshop are empowered to:

- Take a whole-home, Home Performance approach to energy efficiency
- Understand and analyze household energy use and how it changes over time
- Modify behavior to decrease home energy use and carbon footprint
- Become energy leaders in their community and social networks

Benefits of Home Performance are explained to attendees as a more in-depth assessment that employs science and technology to maximize the energy efficiency, comfort, health and safety of their homes and lower energy costs by up to 50 percent. Workshop attendees are encouraged to add Home Performance to their energy-efficiency “to-do” list and are directed to learn more through a video of the assessment in action at www.energytrust.org/hp.

To help customers seamlessly incorporate their new knowledge into instant behavior changes and positively impact their energy-use behavior, Energy Trust distributes Energy Saver Kits with an insert promoting Home Performance. To date, 645 Energy Saver Kits have been distributed, with almost 300 requests for Home Energy Reviews—the entry point into Home Performance.

III. Consumer Programs

Clean Energy Works Portland

In 2010, 298 Home Performance projects originated through Clean Energy Works Portland. Established last year by City of Portland and Multnomah County, Clean Energy Works Portland continues to be a collaborative effort including NW Natural, PGE, Pacific Power, Enterprise Cascadia, and Energy Trust. The pilot offers Portland-metro households energy-efficiency improvements to their home, without upfront costs, using Home Performance as the core program element.

All improvements must be installed by an approved Home Performance trade ally contractor who first tests and assesses the participating home. After the test and assessment are performed, an Energy Trust energy advocate—the homeowner’s single point of contact through the process—provides one-on-one assistance, explains the contractor’s recommendations, low-interest finance options, monthly on-bill payments and helps the homeowner decide which improvements best meets their needs.

BPI-certified Home Performance trade ally contractors were selected to participate in this innovative, nationally-recognized initiative based on their response to a set of weighted selection criteria; a strategy to achieve the Community Workforce Agreement. The Community Workforce Agreement— developed by local, diverse stakeholders and allows funds for contractor training, provides business support services and creates networks of diverse contractor pools for subcontracting—sets new standards for inclusivity and diversity in the contractor workforce and is being emulated all over the country.

Savings Within Reach

In 2010, Savings Within Reach incentives accounted for 16 percent of Home Performance projects channeled through Clean Energy Works Portland. Established in 2009, Savings Within Reach offers increased incentives to moderate-income homeowners—who meet Energy Trust’s gross-income levels based on the number of occupants in the home—giving them access to improvements they may not have been able to make through traditional programs. The incentives are deducted from consumer’s invoice and decrease their out-of-pocket cost, making Home Performance and savings even more accessible.

Trade Ally Development

Customers rely on the training and expertise of Energy Trust’s Home Performance trade ally contractors to remediate complicated health, comfort and safety issues. To ensure contractors meet the needs of the current market and stay up-to-date with the latest energy-efficiency practices, Energy Trust has invested in increased Home Performance contractor education, training and outreach.

Recruitment, Education and Support

In 2010, contractor recruitment and training was a major focus for the program, addressing increased market demand and federal, state and local programs which applied for ARRA funds to develop weatherization programs. To meet this demand, the Home Performance recruiting process was streamlined, resulting in smoother program entry, consistent messaging and greater uptake in training courses. Currently, seven active Energy Trust Home Performance recruiters work to achieve the overarching goal: to recruit and develop the strongest Home Performance contractor network possible.

All Energy Trust trade allies are encouraged to become Building Performance Institute (BPI)-certified. Energy Trust offers high-quality BPI training, including 40 hours of classroom training and 20 hours of field training. Home Performance trade ally contractors are also connected with a BPI-certified account manager who provides on-going field support, including quality assurance and control on the first three projects.

To capitalize on market trends, a new training timeline and field-exam schedule was created early in 2010 to quickly allow contractors to receive their certification and begin offering Home Performance contracting services. As a result of the streamlined recruiting efforts, the number of Home Performance trade ally contractors has increased by 134 percent since the beginning of 2010. Several sole-proprietorship businesses have joined the Home Performance program; four Home Performance contractors have increased their business so much they’ve opened an additional office.

Communications and Training

Additional Home Performance program-related news, installation tips and solutions are continuously communicated through an electronic contractor-focused monthly newsletter, *Insider*. Training workshops (many of which are eligible for BPI continuing education units) and quarterly Roundtable events—a gathering of contractors—allow contractors to provide their feedback and suggestions for promoting Home Performance throughout Energy Trust regions. In 2010, ongoing Webinars were created to keep contractors in outer-lying areas (who may not be able to attend a meeting in another part of the state) informed of Home Performance happenings, including software updates, program changes and quality control requirements. All *Insider* communications and a schedule of upcoming training, Roundtables and webinars are posted to Energy Trust’s contractor event calendar at www.energytrust.com/ta.

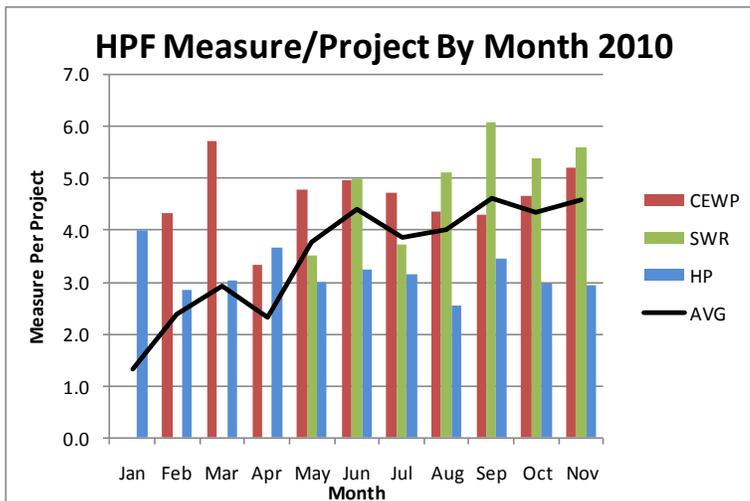
Cooperative Marketing

To further support new and existing Home Performance contractors, Energy Trust offers cooperative marketing—designed to reward volume and quality installations—and receive 45 percent financial reimbursement on approved marketing projects. Approved projects must use the Home Performance with ENERGY STAR logo and messaging, as well as Energy Trust energy-efficient messaging. In 2010, Home Performance Cooperative Marketing reimbursement increased 71 percent from 2009; Home Performance contractors were reimbursed more than \$15,250.

2010 Market Transformation Statistics

According to Energy Trust’s 2010 Residential Awareness and Perception study, almost half (48 percent) of Oregon homes in Energy Trust’s territory recognize the name “Energy Trust,” up 20 percent over the past two years. The increased awareness contributed to the ENERGY STAR® label recognition by 72 percent of the Oregon households surveyed. The rate of participation in Energy Trust programs is 17 percent (up seven percent over 2009).

The following three charts shows that projects are on an upward trend, as are the number of measures per project. While the quantity of Home Performance projects slightly decreased in 2010 compared to 2009, projects are becoming more comprehensive while market pressures are helping to increasing project cost effectiveness. In addition, as a result of increased market awareness and competition, the average cost of installation for the consumer has decreased by 70 percent since 2007.



CEWP = Clean Energy Works Portland

SWR = Savings Within Reach

HPF/HP = Home Performance

Home Performance with ENERGY STAR Yearly Trends			
	2009	2010 <i>Through 11/30/2010</i>	% Change
Number of Projects	932	626	-33%
Annual Savings (kWh)	314,151	940,314	205%
Annual Savings (Therms)	83,038	137,459	66%
Total Installed Cost	\$2,870,818	\$4,990,223	74%
Total Incentives Paid	\$972,616	\$647,248	-33%
Avg Installed Cost	\$3,081	\$7,972	159%
Avg Incentive Paid	\$1,044	\$1,034	-1%

2010 Quarterly Trends					
	Q1	Q2	Q3	Q4	Total
Number of Projects	105	102	253	166	626
Annual Savings (kWh)	57,100	173,212	455,024	274,978	960,314
Annual Savings (Therms)	18,559	22,825	56,558	39,517	137,459
Total Installed Cost	\$530,037	\$707,005	\$1,834,172	\$1,919,009	\$4,990,223
Total Incentives Paid	\$89,124	\$108,151	\$277,135	\$172,838	\$647,248

Energy Trust's commitment to homeowners and contractors has helped increase Home Performance awareness and uptake throughout the Oregon market. By enhancing our offerings we have placed a stronger emphasis on Home Performance, making it more accessible to homeowners and creating more value for contractors through streamlined processes.