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## Northwest Power and Conservation Council

June 4, 2019

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### MEMORANDUM

**TO: Council Members**

**FROM: Charlie Grist**

**SUBJECT: Energy Trust of Oregon Briefing**

### **BACKGROUND:**

**Presenter:** Michael Colgrove, Executive Director, Energy Trust of Oregon

**Summary:** The Energy Trust of Oregon is an independent, non-profit organization created to implement energy efficiency and small-scale renewable resources in Oregon under a stable and consistent funding paradigm. Energy Trust designs and runs efficiency and renewables programs for Oregon customers of Portland General Electric, Pacific Power, NW Natural, Cascade Natural Gas and Avista, and Washington customers of NW Natural.

Michael Colgrove has been Executive Director of the Energy Trust of Oregon since 2016. Mr. Colgrove will brief the Council on the development of a new five-year strategic plan for Energy Trust and other issues.

**Relevance:** Energy Trust is a key player in the regional energy efficiency and renewable resource landscape. It has produced ground breaking approaches to program design, marketing, delivery and evaluation. It contributes a large share of regional electric efficiency savings. It is a top performer in terms of savings as a share of electric energy load. Oregon customers of PGE and PacifiCorp represent about 20 percent of the

region's electric load while recent Energy Trust program accomplishments represent about 30 percent of total regional savings in 2017.

Workplan: A.1.1 Coordinate with regional entities (e.g. NEEA, BPA, utilities, regulators) to ensure the regional goal for cost-effective conservation is achieved.

Background: Energy Trust is a result of 1999 Oregon legislation that required the state's largest investor-owned electric utilities, PGE and Pacific Power, to collect a three percent public purpose charge for efficiency and renewables. The legislation authorized the Oregon Public Utility Commission to direct a portion of those funds to an independent, non-government entity. Energy Trust began operation in 2002 as the primary entity responsible for delivering electric efficiency and renewable resource programs. In 2007, funding of electric programs above the 3 percent public purpose charge was approved with the goal of avoiding the need to purchase more expensive electricity.

Funding for natural gas efficiency programs was added through regulatory proceedings. Energy Trust began administration of natural gas programs in 2003 with NW Natural and in 2006 with Cascade Natural Gas. In 2009, Energy Trust began serving NW Natural's customers in Washington. In 2017, Energy Trust began serving Avista gas customers in Oregon.

More Info: Michael Colgrove joined Energy Trust after 15 years with the New York State Energy Research and Development Authority (NYSERDA) where he was both the director of the New York City office and director of Multifamily Programs. He is a graduate of the New York Institute of Technology's Energy Management master's program and earned his Bachelor of Science degree in Environmental Science at the University of Alaska Fairbanks.

More information on Energy Trust can be found here:  
<https://www.energytrust.org/>



# Energy Trust of Oregon

## Setting Our Strategic Direction

June 11, 2019



# About Energy Trust

- Independent, nonprofit organization
- Support investments in energy efficiency and access to renewable energy
- Serve 1.6 million customers of PGE, Pacific Power, NW Natural, Avista and Cascade Natural Gas in Oregon, and 70,000 customers of NW Natural in Washington
- Provide information and cash incentives for residential, commercial and industrial sectors
- Overseen by independent board, three advisory councils
- Accountable to Oregon Public Utility Commission

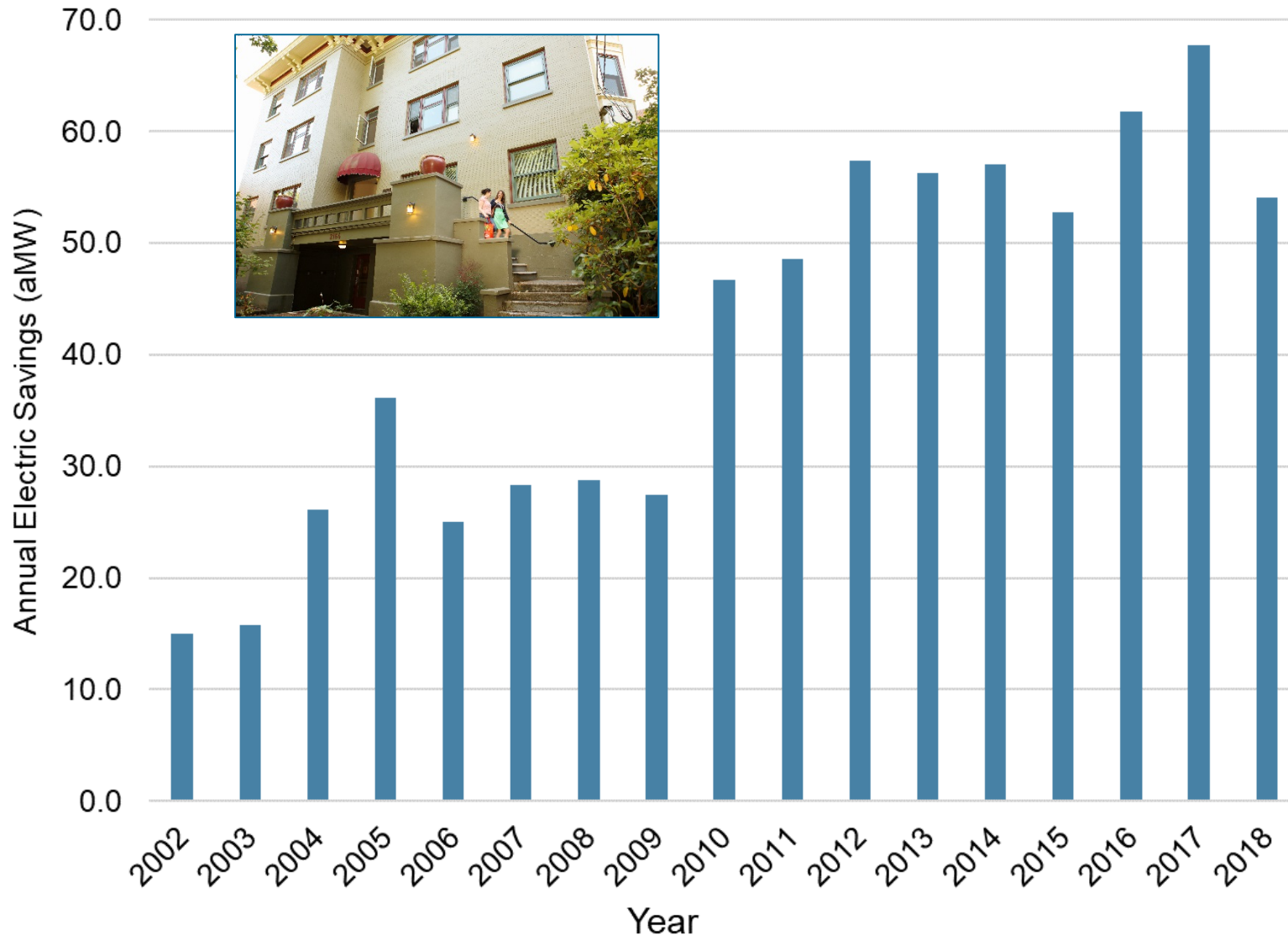


# 2019 Budget and Funding History

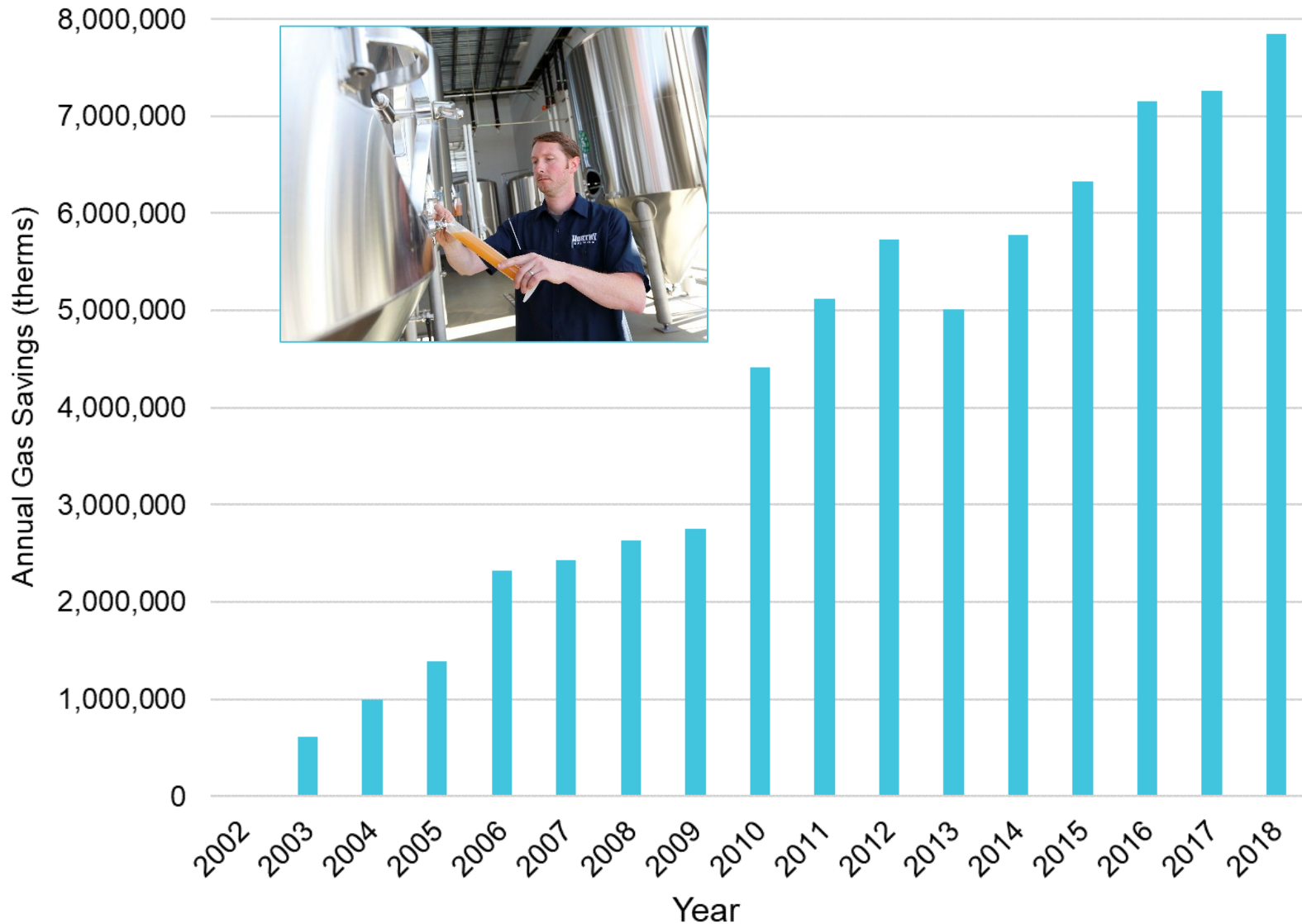
- 2019 annual budget of \$202 million, the majority of which is for electric efficiency
- Funded by a portion of 3% public purpose charge for electric utility customers, and utility tariffs approved by the OPUC



# Energy Trust Annual Electric Savings (net)

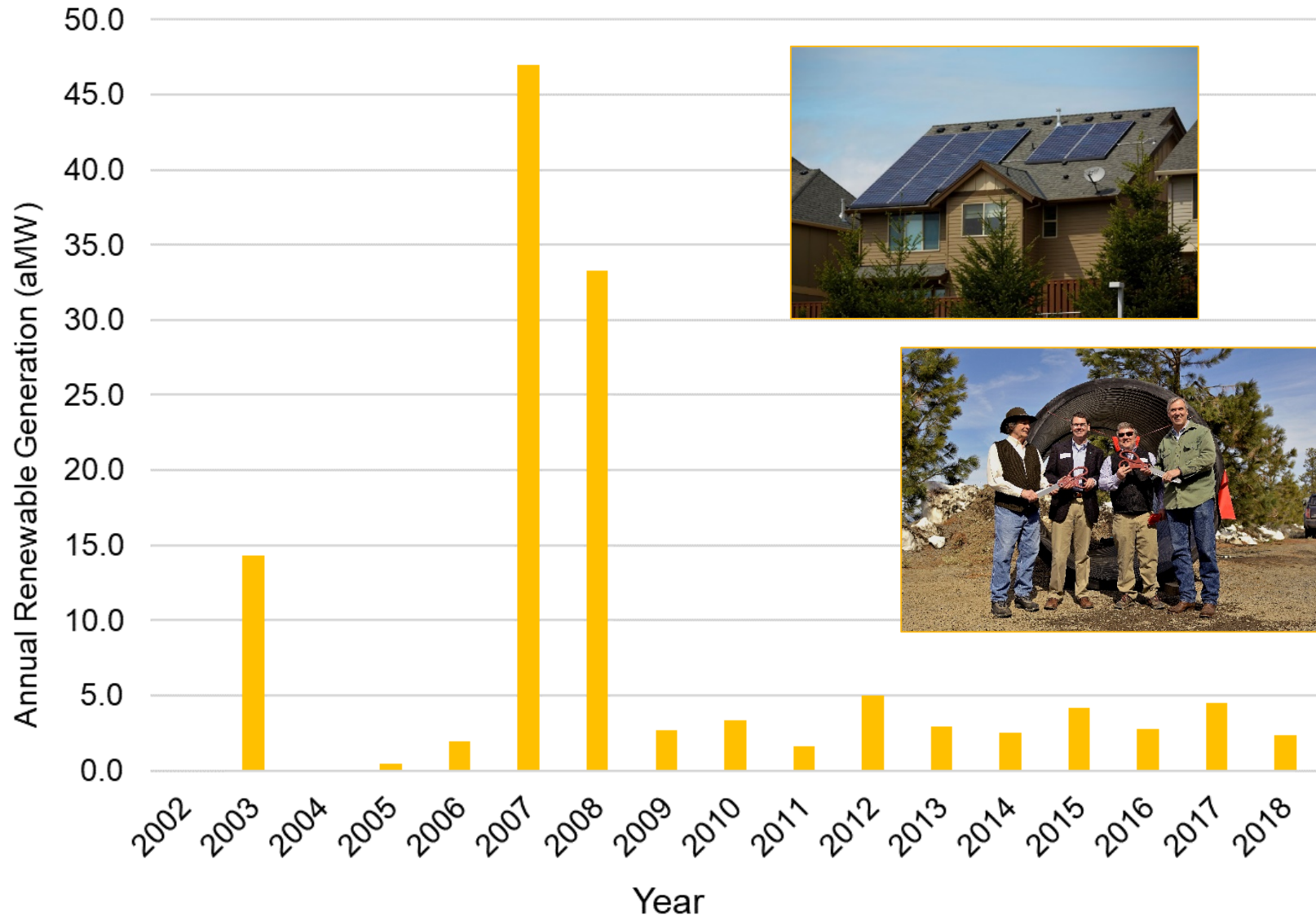


# Energy Trust Annual Gas Savings (net)





# Energy Trust Annual Renewable Generation









# Reflecting on Our Model

## Benefits

- Stable funding
- Nonprofit, avoids customer perception of utility conflict of interest
- Connected to utility resource planning
- Dual fuel
- Nearly statewide
- Direct customer connection

## Challenges

- Single source of funding
- Coordinating with local consumer-owned utilities

# Energy Trust and the Council

- Staff-to-staff collaboration
- Regional Technical Forum
  - Regional peer group and sounding board for our savings analysis work
  - Provide annual RTF funding and serve as member of the RTF and its policy committee
- 7<sup>th</sup> Power Plan and our activities

# Draft 2020-2024 Strategic Plan







# Energy Trust Role in 2020-2024



Program  
Administrator



Connector



Accelerator



Learner



Partner

# Areas of Focus

- 1 Provide relevant programs, information and services for all customers**
- 2 Strengthen the value we deliver by linking clean energy to utilities responding to changing customer energy needs**
- 3 Provide objective information and analyses to support energy policies**
- 4 Maximize public benefits by leveraging additional funding**
- 5 Enhance our ability to quickly and effectively respond to changes, needs and opportunities**

# Public Outreach and Comment

- Stakeholder, customer and public outreach over the summer
- Formal public comment period:
  - June 24 – August 2
  - More information online soon at [www.energytrust.org/strategicplan](http://www.energytrust.org/strategicplan)
- Board of Directors consider final proposed plan at October 16 public meeting





# Thank You

Michael Colgrove  
Executive Director

[michael.colgrove@energytrust.org](mailto:michael.colgrove@energytrust.org)  
503.445.2448