



NORTHWEST
ENERGY
EFFICIENCY
ALLIANCE

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2007 Operations Plan

FINAL

(2-20-07)

Sector Operation Plans

- **Codes – State Support**
- **Commercial**
- **Industrial/Agriculture**
- **Information Resources**
- **Residential**

Codes – State Code Support

2007 Progress Indicators/Milestones

- Encourage adoption of uniform and easily-interpreted energy codes, including:
 - Idaho: Update from 2003 IECC to 2006 IECC.
 - Montana: Update from 2003 IECC to 2004 or 2006 IECC.
 - Oregon: Governor’s request to improve energy code by 15%.
- Help support compliance with energy codes where it is below 85% and maintain it at current levels where it is at or above 85%
- NEEA contractors will represent the NW at national code adoption hearings. They will also work to upgrade codes in national forums such as ASHRAE and NFRC.

2007 aMW Savings

Period	Total Regional Savings	Baseline Savings	Local Utility Program Savings	Net Regional Market Effects Savings
Current Funding (aka Business Plan)	0.0	0.0	0.0	0.0
Previous Funding Cycles	4.7	1.6	0.0	3.1
TOTAL	4.7	1.6	0.0	3.1

2007 Budget

Project (including Evaluation): \$761,000

Operating budget¹

¹ Operating Budget is included in Planning.

Commercial Sector - BetterBricks

2007 Progress Indicators/Milestones

Hospitals & Healthcare

- Continue to assist Providence Health and Services in SEMP implementation. Support business practice change in design and construction, facility operating practices, procurement and facility upgrades.
- Assist 3 or more additional hospital systems or stand alone hospitals. Make progress in systematically assessing and changing energy related business practices through development/approval of a plan, and implementing the plan.
- Further develop the business practice change approach, including tools and templates that enable hospital management and staff to take action. Expand approach to better address smaller hospitals.
- Initiate education, training and marketing activities in conjunction with state hospital associations and others to build greater market awareness and enable additional hospital systems or stand alone hospitals to take action.

Grocery

- Assess and change energy related business practices with 3 or more regional grocery chains, including implementing energy plans that change store prototype designs and store operations.
- Improve the 8 step approach to energy related business practice change, including developing tools, templates and checklists that enable grocery store owners and operators to take action.
- Further define and develop the products and services needed by refrigeration contractors to support better grocery store refrigeration system operating performance.

Office Real Estate

- Continue office real estate product and service development work. Refine and test the market strategy, tools and messaging.
- Construct a delivery approach that maximizes use of market channels and use of available utility/public benefits administrator resources.
- Deliver BOMA's building energy efficiency program (BEEP) locally in partnership with BOMA chapters and utilities/public benefits administrators.
- Establish a business relationship with 2 regional office real estate companies to change energy related business practices, including company commitment, plan development, implementation and follow-through.

Design & Construction

- Continue to expand integrated design lab capabilities. Assist the labs in working together as a network to apply integrated energy design expertise in the market.

- Implement firm focus business relationships with 4-5 high priority NW design and construction firms. Agree on a scope of work and deliver business and technical assistance, education & training, and marketing support.
- Conduct broad based education and training activities in the market in conjunction with associations, utilities/public benefits administrators and others.
- Provide integrated energy design technical assistance to A&E firms on 10 or more projects region wide (half or more within vertical markets). Document project outcomes in terms of energy performance and costs compared to standard practice.

Building Operations

- Further construct the building operating performance toolkit. Further develop products and services that support better building operating performance.
- Implement firm focus business relationships with 4-5 high priority existing building service providers. Agree on a scope of work and deliver business and technical assistance, education & training, and marketing support.
- Conduct broad based education and training activities in the market in conjunction with associations, utilities/public benefits administrators and others.
- Provide building operating performance technical assistance with service providers on 10 or more projects region wide (half or more within vertical markets). Document project outcomes in terms of energy performance and costs.

Marketing/ Education & Training

- Produce collateral and web-site content that reflects effective messaging to priority target audiences. Expand the web-site to include tools and additional content in specific targeted market areas.
- Conduct events and influence public relations coverage that conveys these messages and is well attended and/or recognized by target audiences.
- Establish training and education curriculum that meets high priority education and training needs within vertical and cross-cutting markets. Use NEEA business and technical contractual expertise to the extent practical.
- Deliver training and education activities in partnership with others in the market, included associations, utilities/public benefits administrators and trade allies.

80 PLUS Power Supplies

- EPA adopts a more stringent specification for internal PC power supplies in 2007.
- 100,000 PCs with high-efficiency power supplies are shipped to the NW in 2007.

2007 aMW Savings

Period	Total Regional Savings	Baseline Savings	Local Utility Program Savings	Net Regional Market Effects Savings
Current Funding (aka Business Plan)	1.9	0.8	0.4	0.6
Previous Funding Cycles	4.5	1.5	1.4	1.7
TOTAL	6.4	2.3	1.8	2.3

2007 Budget

Project (including evaluation)		\$6,360,000
Hospitals & Healthcare	\$ 450,000	
Grocery	330,000	
Office Real Estate	400,000	
Design & Construction	2,310,000	
Building Operations	975,000	
Marketing	750,000	
Training & Education	440,000	
Lighting Design Lab	305,000	
Project Support	100,000	
80+ Power Supplies	300,000	
Operating budget ²		\$1,018,941

² Operating budget includes salaries & related expenses and direct project support costs. General Administration is not included.

Industrial and Agriculture Sector

2007 Progress Indicators/Milestones

Review and renew sector direction, goals and funding

- By July, the Board approves and funds Industrial Efficiency Alliance for Jan 1, 2008 through Dec 31, 2010. IEA strategy and contracts are in place to continue seamless delivery of program by December 31. (Current contracts and funding are in place through December 31, 2007)
- By July, the Board approves and funds DEI for Phase II. Strategy and contracts are in place to continue seamless delivery of program by October 31. (Current contracts and funding are in place for Phase I but the program will need an additional \$65,000 by May 1, 2007)

IEA - Pulp and Paper

- An additional two mills move from “engaged” (or below) status to “committed” or “practicing” status with corporate energy business practices, in coordination with and support from their servicing utilities. (As of Dec 1, 2006 four mills are at “committed or “practicing” status” with 5 mills at “engaged” status)

IEA - Food Processing

- An additional 10% of food processing firms move from “engaged” (or below) status to “committed” or “practicing status with corporate energy business practices, in coordination with and support from their servicing utilities. (As of Dec 1, 2006 approximately 8% of food processing firms are at “committed” or “practicing” status with an additional 2% at “engaged” status)

Paper Stiffness Sensor

- Demonstrate sensor functionality, reliability and stability in a production environment and conduct a 6 month trial to optimize paper production via stiffness-based process control of the paper machine. Publish report to determine process savings in energy and feedstock in this specific installation.

Distribution Efficiency Initiative

- Complete data gathering and analysis for Pilot Project and Home Voltage Regulation, publishing final Phase I Report and Distribution Systems Efficiency Options Report by August 15.

Agriculture

- Increase participation in use of AgriMet data to 3,500 per month in 2007. (As of Dec 1, 2006 Agrimet estimates there are approximately 3,200 users)

2007 aMW Savings

Period	Total Regional Savings	Baseline Savings	Local Utility Program Savings	Net Regional Market Effects Savings
Current Funding (aka Business Plan)	6.5	1.1	3.8	1.6
Previous Funding Cycles	3.1	0.5	1.3	1.4
TOTAL	9.6	1.6	5.0	3.0

2007 Budget

Project (including evaluation)			\$4,475,748 ³
IEA ⁴ PMC		\$ 2,850,000	
Utility Coordination		100,000	
Food Processing Outreach		175,000	
Marketing		490,000	
Renewal		50,000	
Evaluation		180,000	
General/Envinta		27,000	
Total		3,872,000	
DEI PMC		\$ 350,000	
Evaluation		32,000	
General		12,000 ⁵	
ETO meter removal		15,000 ⁶	
Total		409,000	
Other Paper Stiffness Sensor		114,000	
Agrimet		80,748	
Total		\$ 194,748	
Operating budget: ⁷			\$ 369,717

³ Sergio needs to update the details of IEA and DEI: is this level of detail needed?

⁴ Added \$150,000 for utility support (\$50k marketing, \$100k PMC- training)

⁵ Not planning on using this funding.

⁶ Pass through expense through ETO special funding (contract extended, ETO funding may not be available)

⁷ Operating budget includes salaries & related expenses and direct project support costs. General Administration is not included.

Information Resources

2007 Progress Indicators/Milestones

EnergyIdeas Clearinghouse

- Produce 48 issues of Energy Newsbriefs e-mail newsletters
- Respond to 350 requests for detailed technical information

Local Governments Associations

- Idaho: Hold 21st annual energy conference in October
- Montana: Visit 12 targeted communities to promote energy efficiency practices
- Oregon: Revamp electronic outreach tactics
- Washington: Hold green buildings conference in October

NW Currents

- Increase subscribership by 10% among each of its target audiences.
- Increase the referral of individual articles from reader to reader, further establishing itself as a credible source of energy efficiency and renewables policy and activities news in the Northwest region.
- The nwcurrenents contract will expire in December 2007. As a result, staff will compare the goals, accomplishments, and budget of the publication against NEEA's goals and objectives and prepare a staff recommendation memo regarding this project for the July 2007 Board meeting.

2007 aMW Savings – Net Market Effects

Not Tracked

2007 Budget

Project (including evaluation) \$934,249

EIC	\$ 500,000
LGA	267,788
NW Currents	141,461
Evaluation	25,000

Operating budget⁸

⁸ Operating budget included in Industrial

Residential Sector

2007 Progress Indicators/Milestones

ENERGY STAR Northwest ENERGY STAR Northwest

- Attain 7% market share; 5,481 certified homes

Consumer products

- 8.8 million CFL sales in region
- 500,000 CFL sales increase in Idaho and Montana (based on 2006 final sales)

2007 aMW Savings

Period	Total Regional Savings	Baseline Savings	Local Utility Program Savings	Net Regional Market Effects Savings
Current Funding (aka Business Plan)	19.0	4.1	4.9	10.0
Previous Funding Cycles	32.6	12.8	2.4	17.4
TOTAL	51.6	16.9	7.2	27.4

The Wal-Mart Effect

With Wal-mart's recent corporate announcement that it plans to sell 100 million CFLs in the next year, there are a few possible implications to the Northwest market and NEEA program projections. The first issue is whether these sales will grow the market (e.g., positive MT effect) or cannibalize the market by simply shifting sales away from other retailers. While it is too soon to know, the Wal-mart buyers are reporting increased sales, quarter-to-quarter. We have also heard that CFL sales through Home Depot are 60% higher this fall. Assuming that these early indications are accurate, the most likely scenario is that Wal-mart CFL sales will be cumulative as opposed to shifting as a result of cannibalizing other retail outlet sales. Further evidence to support this theory is that Wal-mart's current pricing of CFLs is not as low as many CFLs offered through the home centers. The home centers have enjoyed a healthy market share of CFLs sales, and should be expected to do more merchandising and price discounts to keep their customer sales.

The other key issue is treatment of Wal-mart CFL sales in our baseline. One major indicator to inform this determination is that the potential increase in sales of up to 100 million CFLs is three times what the national sales across all retailers were in 2005. We know from the information provided by manufacturers that they are already nearing their production capacity limits. This means that, at least for the near term, CFLs will go where the demand is greatest—or where there are more active programs supporting the market. This is how the market is currently functioning. (We estimate that approximately 20% of the recent national CFLs sales occur in the Northwest.) Using the NEEA baseline model that reflects the level of CFL sales in areas of the country where there hasn't been any program activity, no more than 10% of all Wal-mart sales are projected to come from the low activity markets.

Given these factors and depending on Wal-mart's actual success rate, the "best case" impact to the Northwest would be 18 million additional Wal-mart CFL sales in the region in 2007 (assumes that the Northwest share is 20% of the national sales after 10% baseline has been removed). Even if Wal-mart only achieves 50% of its goal and the baseline doubles, the "worst-case" scenario is 8 million Walmart CFL sales in 2007. Both of these scenarios are based on the current projection that that non-Wal-mart sales will be 8.8 million in 2007.

2007 Budget

Project (including evaluation)		\$4,222,000
ES Homes NW	\$2,767,000	
Products	900,000	
Evaluation	605,000	
Operating budget: ⁹		\$ 326,172

⁹ Operating budget includes salaries & related expenses and direct project support costs. General Administration is not included.

Business Services and Office & Board Support Operation Plans

- **Planning**
- **Evaluation & Market Research**
- **Finance/Accounting**
- **Information Technology**
- **Corporate Communications**
- **General Office and Board Support**

Planning Department

2007 Key Activities

Board/Committee Support

- Support Strategic Planning Committee
- Support Cost Effectiveness Committee

aMW and Cost Effectiveness Analysis and Reporting

- Finalize Process, models, filing system
- Finalize the web posting of ACE Models and tracking data for access by utilities/PUCs and others as appropriate.
- 2006 Annual Savings Reporting
- Cost-effectiveness Analysis
 - Renewals – IEA
 - Current & Previously Funded Projects

Manage/Support Board-led five-year Retrospective of NEEA beginning in the summer of 2007 with scheduled delivery in July of 2008.

Manage Unsolicited Proposal Process

Meet with California utilities and Energy Commission staff regarding emerging technologies and serve on advisory committees as appropriate.

Serve on Board of New Buildings institute

Strategic Issues in 2005-2009 Business Plan:

- How should NEEA's portfolio of initiatives be balanced around: near and long term savings; supporting infrastructure or products and services; ensuring sectoral and geographic equity?
- What does the 2010 – 2014 funding cycle portfolio look like, what are the best MT opportunities to pursue, at what cost and with what results?
 - Should NEEA grow in any areas, such as market research, developing emerging technologies, evaluation or regionally coordinated market-based efficiency efforts?
 - What is the role of NEEA in helping to meet the goals of the Fifth Power Plan?

2007 Budget

Operating budget:¹⁰ \$378,798

¹⁰ Operating budget includes salaries & related expenses and direct project support costs. General Administration is not included. Includes Code support without related salaries which are included in evaluation.

Evaluation and Market Research

2007 Key Activities

Northwest ENERGY STAR

Evaluation efforts for 2007 will focus on the ongoing evaluation of the two Northwest ENERGY STAR components: ENERGY STAR Lighting and ENERGY STAR New Homes. Deliverables will include Market Progress Evaluation Reports (MPERs) for both Lighting and New Homes. With regard to ENERGY STAR Lighting, we intend to keep a careful eye on anticipated changes in the lighting market; and in preparation for the mid-term review, we will conduct detailed purchaser and shelf surveys.

In addition to the above mentioned reports, several other evaluation activities will begin in 2007. As part of the Residential New Construction Characteristics project, a second report in the third quarter of 2007 will provide a comprehensive billing analysis of newly constructed homes.

We will also initiate an impact evaluation of ENERGY STAR new homes in 2007 that will provide an analysis of actual realized savings per home, based on homes built in 2006-2007. The project will kick off in early 2007, with the evaluation team working closely with utility partners to define market research requirements. Site visits and data collection will take place during the second half of 2007, and the final report is expected in late 2008.

Evaluation also will begin tracking the impact of new ENERGY STAR specification on the clothes washer market in the Northwest. It is expected that this brief report, which will be delivered in mid-2008, will actively track progress in this market for 2007 in order to understand the degree to which market progress continues without NEEA funding.

Better Bricks

Commercial Sector evaluation and market research work includes three major components: market progress evaluation, which will be aligned with the three vertical and two cross-cutting market elements; energy savings measurement and analysis; and a repeat of the Regional Commercial New Construction Building Characteristics survey.

In the area of market progress evaluation, the hospital and grocery target markets evaluations will continue with a third MPER for each market in 2007. Evaluation efforts for the commercial real estate market, a new target market begun in late 2006, will focus on a market characterization update and decision-maker baseline survey. Evaluations for the two crosscutting markets--design and construction, and building operations--will also be completed in 2007. Evaluation of the CSI as a whole will also be kicked off in 2007, with the first initiative-wide report available in early 2008.

2007 energy savings measurement and analysis will center on refining and implementing the protocols developed in 2006 with particular emphasis on ensuring consistent data

collection and analysis. A report estimating energy savings associated with specific BetterBricks projects will be produced as soon as a sufficient number of projects are completed. Resources will also go to support West Coast and national efforts to develop widely-accepted daylighting metrics. These metrics would serve as the basis for energy savings estimation.

Finally, fieldwork for the Commercial New Construction Building Characteristics Study conclude in early 2007. Deliverables include a final characteristics report and presentation in late-2007 with a final report on energy use to follow in early 2008. This study will serve as a baseline for the Commercial Sector Initiative.

Industrial Efficiency Alliance

The IEA evaluation's primary deliverable in 2007 will be MPER #3. The report will detail market progress and initial savings impact as well as a review of ACE model assumptions for this initiative.

MPER #3 of the DEI evaluation will provide an assessment of the project's pilot phase (Phase I) of the initiative, in which two types of voltage regulation technologies were deployed. This assessment will address process and will review the statistical analysis upon which initial savings estimates are based.

New Technologies

In 2006, the first evaluation of the 80 PLUS initiative was completed. In late-2007 a second MPER will continue to track the initiative's market progress, and will feature interviews with original equipment manufacturers and end users.

Codes Support

The Energy Code Support evaluation will evaluate the project's progress and success in achieving the goals and objectives outlined in the project description. A second MPER that builds on the 2005 evaluation, will track project progress and will include results from a survey of code support "end-users" including designers and builders. In addition to the MPER, A follow-up to the 2004 codes savings report will expand that analysis to include residential savings estimates and will also estimate the share of savings from Alliance-funded activities.

Information Resources Projects

The evaluation team will conduct evaluations of the Local Government Association project in 2007. This evaluation will focus on identifying opportunities for synergy and leverage between NEEA's sectoral initiatives and LGA activities . Although the MPER for this project will detail accomplishments, the primary deliverable will be recommendations to senior management as to how NEEAs relationship with the LGAs can be leveraged to help achieve sector goals.

Long-Term Monitoring & Tracking of Inactive Projects

The evaluation team will continue its ongoing effort to track market progress for projects that are no longer being funded. The findings from this effort will be incorporated into the respective ACE models for the projects being tracked, in order to validate the continued savings estimates for those projects .

Corporate Evaluation

The evaluation team will design and field a survey of target audience perceptions of NEEA. This survey will replace the "Utility Satisfaction Survey" conducted in 2004 and 2005 (prior to the NEEA transition), and it will be conducted annually.

2007 Budget

Evaluation & Market Research		\$1,591,000
Residential	\$605,000	
Commercial	624,000	
Industrial	212,000	
Code Support	60,000	
LT Tracking & Monitoring	65,000	
Infrastructure/Local Government	25,000	
Operating budget: ¹¹		\$ 467,243
Corporate/Target Audience Survey	\$10,000	

¹¹ Operating budget includes salaries & related expenses and direct project support costs. General Administration is not included.

2007 Evaluation/Market Research Schedule* - October 3, 2006

Sector	Project	Work Product	Final	Description
Residential	Budget: \$605,000			
	New Construction Building Characteristics Market Research	Market Research Report #2	2Q 2007	<ul style="list-style-type: none"> Billing Analysis of newly constructed residential homes
	DEI—Residential Building Characteristics Survey	Market Research Report	1Q 2007	<ul style="list-style-type: none"> Residential building stock characteristics and energy use
	ES Consumer Products Evaluation	MPER #3	1Q 2007	<ul style="list-style-type: none"> Market Progress
	ES New Homes Evaluation	MPER #4	2Q 2007	<ul style="list-style-type: none"> Market Progress
	ES Homes Impact Evaluation	Market Research Report	3Q 2008	<ul style="list-style-type: none"> ES new const. Charac. & energy use
	ES Clothes Washer Market Review	Report	2Q 2008	<ul style="list-style-type: none"> Market review
Commercial	Budget: \$624,000			
	BB Hospitals	MPER #3	4Q 2007	<ul style="list-style-type: none"> Market Progress
	BB Groceries	MPER #3	4Q 2007	<ul style="list-style-type: none"> Market Progress
	BB Real Estate	MPER #1 MPER #2	1Q 2007 1Q 2008	<ul style="list-style-type: none"> Baseline; Market Characterization Market Progress
	BB Design & Construction	MPER #2	4Q 2007	<ul style="list-style-type: none"> Market Progress
	BB Building Operations	MPER #1 MPER #2	1Q 2007 4Q 2007	<ul style="list-style-type: none"> Baseline; Project Update; Logic Model Market Progress
	BB Energy Savings Measurement	Report #2	4Q 2007	<ul style="list-style-type: none"> Initial energy savings estimates
	80 Plus Evaluation	MPER #2	4Q 2007	<ul style="list-style-type: none"> Market Progress
	New Construction Characteristics	Market Research Report #1 Billing Analysis Report	3Q 2007 1Q 2008	<ul style="list-style-type: none"> New construction characteristics and energy use
	BB Overall		1Q 2008	<ul style="list-style-type: none"> Overview of progress vis-à-vis comp. logic model
Industrial	Budget: \$212,000			
	IEA	MPER #3	2Q 2007	<ul style="list-style-type: none"> Progress Evaluation Review of ACE Assumptions Initial Impact Evaluation
	DEI	MPER #3	4Q 2007	<ul style="list-style-type: none"> Impact Evaluation
Codes Supp.	Budget: \$60,000			
	Codes Support	MPER #2	3Q 2007	<ul style="list-style-type: none"> Process Evaluation
LTMT	Budget: \$65,000			
	LT Tracking/Monitoring	2006 Annual Report	1Q 2007	<ul style="list-style-type: none"> Review/Refinement of ACE Model Assumptions
Info Res.	Budget: \$90,000			
	EIC	MPER #6	3Q 2007	<ul style="list-style-type: none"> Progress Evaluation
	LGA	MPER #5	4Q 2007	<ul style="list-style-type: none"> Process Evaluation

Finance/Accounting

2007 Key Activities

<i>Description/Title</i>	<i>Implementation Timing</i>	<i>Costs</i>	<i>Comments</i>
Revenue/Expense Tracking by Source	Q1/Q2 2007	\$5,000	This project incorporates a modification to the current financial system, GreatPlains/Wensoft. The modification incorporates the tracking of both revenues and expenses by the 'source' of funds. This project also <u>begins</u> the process of modifying all the online interactive reports to reflect this new functionality. When fully implemented, users will have at their fingertips the ability to access funding/expense status including or excluding designated funds.
Physical Inventory of Fixed Assets	Q1/Q2 2006	\$5,000	A complete blind physical inventory has not occurred since 2002. This is a critical activity, and required by fiscal policy, to confirm the value and existence of all assets purchased. A complete 'library' of items owned as well as the value of assets for insurance purposes is created during this process.
Salary Survey	Q2/Q3 2007	\$5,000	NEEA performs an independent confidential salary survey every other year. The survey's purpose is to confirm NEEA is paying employees at the 'Market Rate' for their position. In past years, the survey has been cosponsored by Energy Trust and has included a survey of the benefits offered by NEEA.
Budget Software	Q2/Q3 2007	\$15,000 Cash \$5,000 per year on the f/s	The final piece of automation in the finance area is researching & implementing a budgeting software tool if it is cost effective. The current budgeting process takes place completely in excel, which is well suited to accountants but is not user

<i>Description/Title</i>	<i>Implementation Timing</i>	<i>Costs</i>	<i>Comments</i>
			friendly for the cost center managers.
Cash Forecaster "5" Rolling Quarter Modification	Q1/Q3 2007	\$13,000	The Cash Forecaster is a tool for managers use to forecast cash usage, by quarter. The tool is currently a forward looking rolling Four Quarter view. An enhancement will allow managers to provide an update to the quarter as it commences which may have significant affect on future quarters.

2007 Budget

Operating budget¹²

\$439,416

¹² Includes all Business Services personnel costs. Operating budget includes salaries & related expenses and direct project support costs. IT project support or direct implementation costs are reflected in the IT budget.

Information Technology

2007 Key Activities

2007 IT Operations Plan Overview

2006 was an extremely busy year for the IT group. The first months of 2007 continue this pace as significant efforts continue in both the applications and infrastructure areas. It is assumed that by mid-2007 this period of extensive development will taper off and be replaced by an ongoing period focused more on support and maintenance. This will be an important milestone for the IT group as it signals the end of the current capabilities building phase and the beginning of a period of sustaining these new capabilities for the organization.

The graphic below provides a summary of planned IT activities. The timeline should be considered preliminary but provides a starting point for more detailed planning. In the section following, each item listed below is briefly discussed.

2007 IT Projects and Other Activities

Project or Major Work Effort	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Contact Manager Upgrade												
Network Share Re-Org Phase I												
Web Reporting Tool												
Network Share Re-Org Phase II												
Tracking System Upgrade(s)												
Implement New Backup Solution												
General Infrastructure Enhancements												
VoIP Telecom/Teleconference Options Analysis												
Budgeting Software Implementation												
Cash Forecaster Upgrade												

Ongoing Activities	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
User & Desktop Support												
Infrastructure Maintenance and Support												
In-house Training (brownbags, user documentation, etc.)												
IT Process and Procedure Development												
Industrial Tracking System Maintenance and Support*												
Commercial Tracking System Maintenance and Support*												
Contact Manager Maintenance and Support*												
IT Team Management and Status Reporting												

*Includes report development

2007 IT Operations Plan Details

Contact Manager Upgrade

Started in 2006 this project will complete in early 2007. The goals of this project include A) providing a user-accepted Contact Management tool which integrates with Outlook/Exchange and B) the sharing of contact and organization information with the Tracking Systems.

Major Milestones: Go-Live (December 2006 – January 2007); Conversion to Post-Production Support.

Network Share Re-Org Phase I

Phase I of this project is to bring order and structure to the existing F drive. This project will begin in 2006 but likely finish in Q1-Q2 of 2007. This is a critical project for the organization as the existing network share organizes information poorly leading to information not being locatable, duplication, and unnecessary documents being stored in a publicly accessible location. The challenge of this project is not a technical one but that of creating an accepted organization for electronic files and the resulting organizational change of suing the new structure. *Major Milestones: Finalization of the new File Structure; Migration from the Old structure to the New.*

Web Reporting Tool

Tools are currently in place to track web usage but these tools and their related processes are not user-friendly. This project will consider tracking needs, present options, and implement a tracking tool/process that will meet the organization's needs. The greatest risk to this project's success is that no staff member will have the available bandwidth to continue the process once it is established. *Major Milestones: Requirements Documented; Tool/Process Recommendation; Tool/Process Go-Live.*

Network Share Re-Org Phase II

Phase II of this project is to assess document management tools and related processes to better create, manage, and search documents. A likely forerunner is Microsoft's SharePoint. This project will likely require the purchase of a new Windows-based file server and additional software (these items are included in the 2007 IT Budget). Phase II relies on the file structure and organization created in Phase I. *Major Milestones: Prototype of Document Management Tool; Pilot of Tool; Full Rollout to the Organization.*

Tracking System Upgrade(s)

This item is currently a placeholder for potential functionality changes to the Tracking System. While the maintenance and support line item provides funds for minor enhancements, any significant changes would need to be scoped and approved as a formal project. *Major Milestones: Scope Definition; Others TBD based on Scope Definition.*

Implement New Backup Solution

As the volume of our electronic data (files, emails, databases) continues to grow we are rapidly approaching the limit of our current offsite backup solution. It is likely that in 2007 we will no longer be able to take full data backups *offsite* (although we could continue to make and retain backup's *onsite*). Offsite backups serve as critical insurance against catastrophic events such as fire, water damage,

malicious activity, or earthquake which have the potential to destroy all the organization's electronic data. After an appropriate analysis of the options is completed our existing backup solution should be replaced with a more robust and expandable one.

Major Milestones: Analysis and Recommendation Document; Installation of new Solution.

General Infrastructure Enhancements

Several "infrastructure enhancements" are anticipated to occur in early 2007.

These include:

- Installation of New Firewall(s)
- Development of a Disaster Recovery Plan
- Completion of a Security Review
- Completion of Infrastructure Documentation
- Formalization of Software License Process & a Compliance Audit
- Wireless Upgrade

Major Milestones: The Completion of each item listed.

VoIP Telecom/Teleconference Options Analysis

While our existing phone and data services meet the needs of the organization new packages, including those utilizing VoIP (VoIP = Voice over IP = the use of the Internet for phone communication) should be investigated to look for potential savings and new features such as videoconferencing.

Major Milestones: Analysis and Recommendation Document; Decision on new Solution; Implementation of new Solution.

Budgeting Software Implementation

NEEA's operations budgeting is currently prepared in an excel spreadsheet. This is the only aspect of the accounting process that is not automated and therefore prone to human error. In addition, the accountants at NEEA function very well in this atmosphere, though spreadsheet great amounts of hours updating annual updates to departments & natural account numbers. Although, this seems easy there are thousands of links and reports that require updates. These changes have happened each year, four, that I've been with NEEA. These updates alone we are estimating take 60 - 80 hours. Based upon our combined average hourly rate the automation ability to creates 'trees' this would save NEEA approximately 60 hours annual (net value of \$\$2,100). In addition, Senior Managers have expressed difficulty in working in excel in general and therefore we either do their input for them or they struggle. We are generously estimating using a low average the tool because it designed for ease of use will save NEEA the additional \$3,000 in time/effort to make this a good return of investment.

Major Milestones: Development of Project Plan; Project Kick-Off, Project Go-Live.

Cash Forecaster Upgrade

Cashflow Forecaster - modifications to a 'Five Quarter Rolling Projection Tool'. As part of the financial management of the organization and the uniqueness of our organization we created a tool whereby users (projects folks) can input their anticipated cash flow needs by contract. This tool tracks it at a rolling 4 quarter clip. The tool is linked into GreatPlains/WennSoft to facilitate the populating the data. Currently, a project manager is requested to prepare a projection on March 1st for Q2, Q3, Q4 and Q1 of the following year. This work is usually started by the project manager half way through the quarter they are currently 'in' (i.e. Q1). The request been to be able to forecast cashflow for 5 quarters. For example March 1st they would project Q1 (the Q they are literally in), Q2, Q3 and Q4 of the current year, along with Q1 of the following year. Given the project is prepared midway through the current Quarter they feel they can't project into the future without reassessing the current Quarter.

Major Milestones: Development of Project Plan; Project Kick-Off, Project Go-Live.

User & Desktop Support

This is an ongoing activity which includes activities such as rolling out new desktops and laptops, responding to user issues and questions, preventative maintenance, etc.

Infrastructure Maintenance and Support

This is an ongoing activity which includes activities such as monitoring the infrastructure for problems, resolving problems that may arise, preventative maintenance, performing backups, etc.

In-house Training (brownbags, user documentation, etc.)

This is an ongoing activity which includes activities such as planning and delivering brownbags, 1:1 user training, providing end-user documentation, etc.

IT Process and Procedure Development

This is an ongoing activity to formalize and document IT policies, procedures, and practices. The more tasks are documented the quicker they can be performed, the more consistent their outcomes are, and the easier another resource can step in and complete the task as needed.

Industrial Tracking System Maintenance and Support

This is an ongoing activity which includes activities such as monitoring and ensuring the quality of data, ensuring proper system use, end user training, managing change requests and defects, and developing reports.

Commercial Tracking System Maintenance and Support

This is an ongoing activity which includes activities such as monitoring and ensuring the quality of data, ensuring proper system use, end user training, managing change requests and defects, and developing reports.

Contact Manager Maintenance and Support

This is an ongoing activity which includes activities such as monitoring and ensuring the quality of data, ensuring proper system use, end user training, managing change requests and defects, and developing reports.

IT Team Management and Status Reporting

This is an ongoing activity which includes activities such as preparing and delivering status, planning future IT work, setting of priorities, directing ongoing technical activities, and budget preparing and monitoring.

2007 Budget

Operating budget:¹³

\$644,476

¹³ Operating budget includes salaries & related expenses and direct IT project support costs. Costs include IT projects for other functional groups.

Corporate Communications

2007 Key Activities

Internal communications and trainings to make sure that the brand is being accurately communicated to the marketplace

- Continue integrating brand with sector efforts
- Finalize and maintain brand standards
- Develop and implement mechanisms for institutionalizing
 - Contract language, reporting
- Conduct Trainings:
 - One formal staff training
 - Two rounds of formal Contractor training
 - One Board Briefing
 - Establish process and training for new staff and contractors

One-on-one outreach

- Finalize strategy and annual plan and support implementation of multiple one-on-one corporate outreach strategies
 - Margie Gardner and funding utility/PBA CEO's and BPA
 - NEEA staff to act as "liaisons" with key utility staff
 - Outreach from Margie to President/CEOs of key contractors

Use e-mail communications to deliver messages to target audience groups

- Create and distribute six "NEEA News"
- Finalize strategy for key audiences:
 - NEEA "pulse" e-mails from Margie and the Board Chair to utility/PBA CEO's and BPA
 - Contractor e-mail from Margie
 - E-mail updates to key external stakeholders

Use media relations with select media to tell the story of NEEA's unique value and benefits to external stakeholders

- Media Briefings

Schedule two state of energy efficiency briefings with key reporters. These briefings would be done jointly with Margie and a funding utility/PBA CEO. The goal of the briefings is to position NEEA and its funding utilities as the expert/leader in energy efficiency in the NW.
- Targeted media outreach and announcements

Issue press releases and/or pitch media on milestones achieved and any other newsworthy item. These efforts will be combined with proactive media pitching to encourage coverage and continue to build relationships with reporters.

Create corporate communications materials that reinforce brand structure and messaging

- Publish Annual Report
- NEEA Website maintenance & conduct a usability study
- NEEA Corporate Collateral
 - Collateral pieces will be created to support the new brand. This will include a corporate brochure, success stories that reinforce the value propositions, presentations and other materials as needed.

2007 Budget

Operations and Communications Budgets: \$348,973

Corporate Communications Overview

Corporate Communications Long Term Goals:

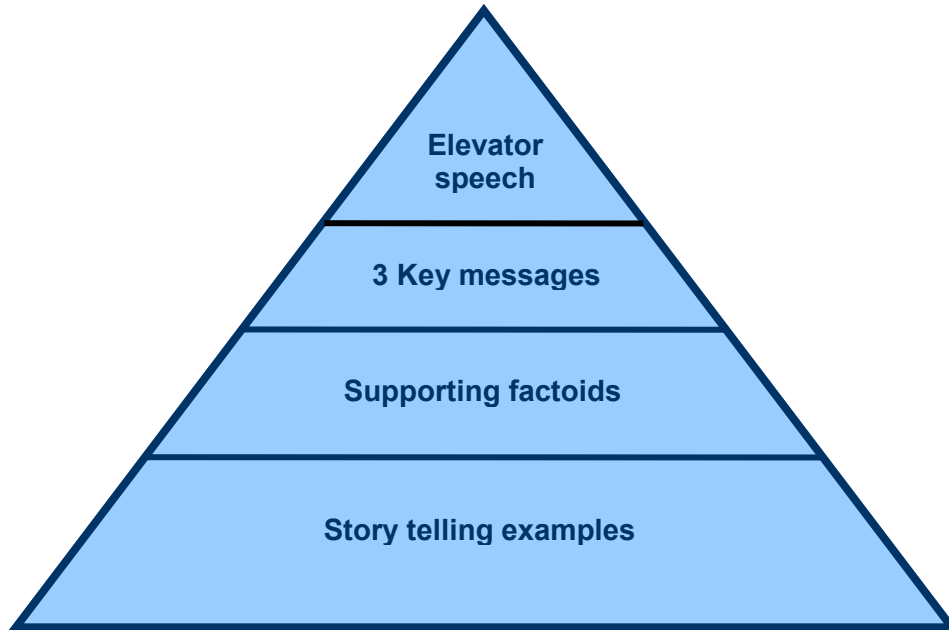
- Internal and key external stakeholders understand and are able to articulate the purpose and unique value and benefits of NEEA
- Stakeholders are supportive of and see value in NEEA's role in the region
- Stakeholders are engaged in an ongoing dialogue with NEEA about how to create a culture of energy-efficiency in the Northwest

Stakeholder Communications Milestones/Timeline:

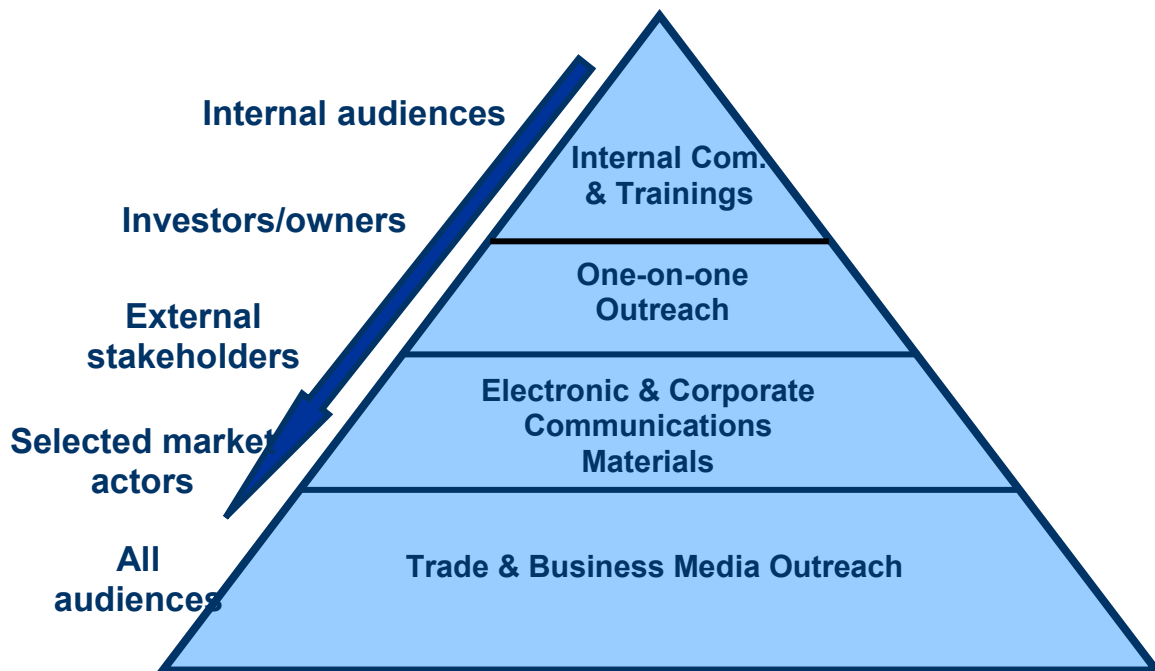
		Year 1			Year 2		Yr 3	
		Audience	3m	6m	12m	18m	24m	36m
Milestones	Approve plan for 3-year corporate marketing strategy	Sr. Managers						
		Board						
	Participate in training/briefing sessions	Board						
		Staff						
		Contractors						
	Fully understands and is able to consistently communicate NEEA's unique positioning and value proposition.	Board						
		Staff						
		Contractors						
	Use the same language, messages and "storytelling" to describe the value and unique positioning of NEEA.	Board						
		Staff						
		Contractors						
	Sector brands are integrating NEEA brand messaging when appropriate.	Staff						
		Contractors						
	Aware of and value of NEEA's unique role and the benefits that the organization and its programs deliver to them/the region.	Funding Utility CEO's						
		Funding Utility Staff						
		External Stakeholders						
Actively support the partnership with NEEA within their organization.	Funding Utility CEO's							

Message Strategy

A message strategy is being developed to support the desired brand platform. The message strategy will include the “elevator speech” for the organization, three key messages, supporting factoids and storytelling examples. All of the elements will help establish the desired brand platform and value propositions. A visual depiction of the message strategy is as follows:



Communications Framework



General Office and Board Support

2007 Key Activities

General Office

- Remodel open office area for improved workspace
- Host staff retreat, summer picnic, and holiday party.
- Conduct annual staff satisfaction survey.

Board Support

- Support Board Governance
- Support four Board meetings
- Support Executive Committee

2007 Budget

Operations Budget:¹⁴

\$844,153

¹⁴ Operating budget includes salaries & related expenses for the Executive, Administrative and Shared Facilities/Expenses areas within NEEA.