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May 1, 2008

## MEMORANDUM

**TO:** Council Members

**FROM:** Tom Eckman

**SUBJECT:** Regional Utility, Bonneville and System Benefits Charge Administrator  
Conservation Savings - Status Report for 2005 - 2007

In the 5<sup>th</sup> Plan, the Council directed its Regional Technical Forum (RTF) to conduct an annual survey of utility conservation program savings in order to assess progress toward the Plan's conservation targets. Staff, on behalf of the RTF, requested data on 2006 and 2007 program expenditures and savings from all utilities in the region. In addition, staff requested identical information from two organizations that administer their states "system benefits charge" (SBC) (the Energy Trust of Oregon and Northwestern Energy) and the Northwest Energy Efficiency Alliance (NEEA) that operates regional market transformation programs.

Since not all utilities respond to the survey, the staff also queries the RTF's online Planning, Tracking and Reporting system to capture information provided to Bonneville by utilities participating in its Conservation Rate Credit and Conservation Acquisition Agreement programs. As a result, the 2005 through 2007 surveys cover ninety percent of the region's load and over 80 of the region's approximately 130 utilities.

A summary of the survey's major findings appears in the table below. This table compares the 5<sup>th</sup> Plan's annual conservation targets to the savings reported by utilities, Bonneville, SBC Administrators and NEEA. As can be seen from a review of this table the region is not only meeting the 5<sup>th</sup> Plan's conservation targets, but in all years, it far surpassed them.

Program Administrator	2005	2006	2007
<b>5th Plan Target (Average Megawatts)</b>	<b>130</b>	<b>135</b>	<b>140</b>
Utility & SBC Funded Conservation	79	73	105
Bonneville Funded Conservation	23	27	18
Alliance Programs (Utility, SBC and Bonneville Funded)	29	25	37
Bonneville Funded Conservation (Carry Over)	14	14	0
<i>Sub-Total w/ Bonneville Carry Over</i>	<i>144</i>	<i>139</i>	<i>161</i>
Non-Programmatic Market Effects	28	28	42
<b>Total w/ Non-Programmatic Market Effects</b>	<b>172</b>	<b>167</b>	<b>202</b>

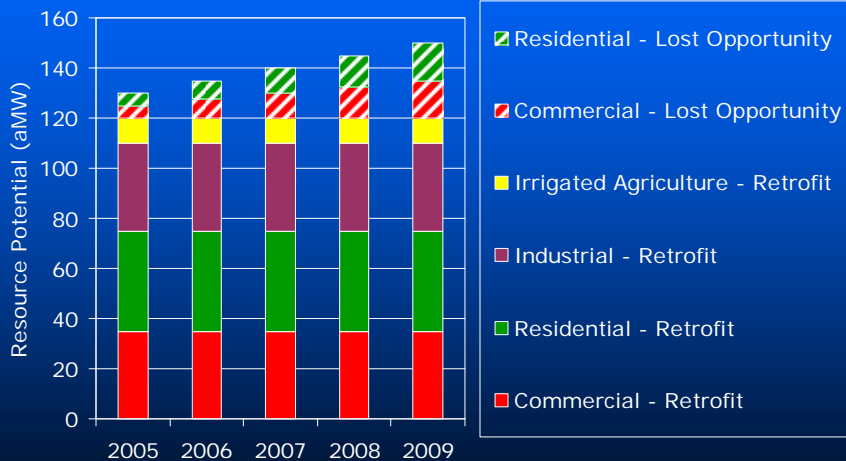
# Regional Conservation Savings Since the 5<sup>th</sup> Plan's Adoption

*Are We Meeting the Plan's Targets?*

March 14, 2008



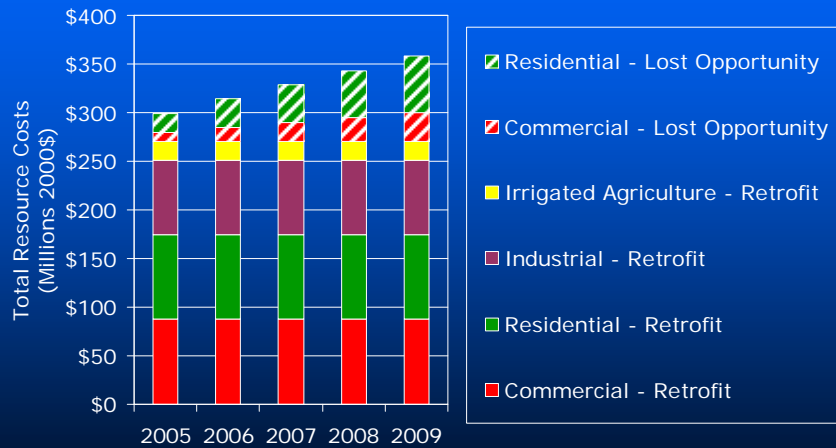
## 5<sup>th</sup> Plan Conservation Resource Acquisition Targets 2005 – 2009 = 700 aMW



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## Total Resource Acquisition Cost 2005 – 2009 = \$1.64 billion



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Average Levelized Cost = 2.4 cents/kWh (2000\$)



## Regional Technical Forum's Utility System Conservation Accomplishments Survey

- Online Survey of All Utilities and System Benefits Charge Administrators
- Conducted Annually
- Supplemented By
  - Utility program reports submitted to Bonneville
  - Northwest Energy Efficiency Alliance regional evaluation of energy efficiency market changes

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## How "Good" Are the Numbers?

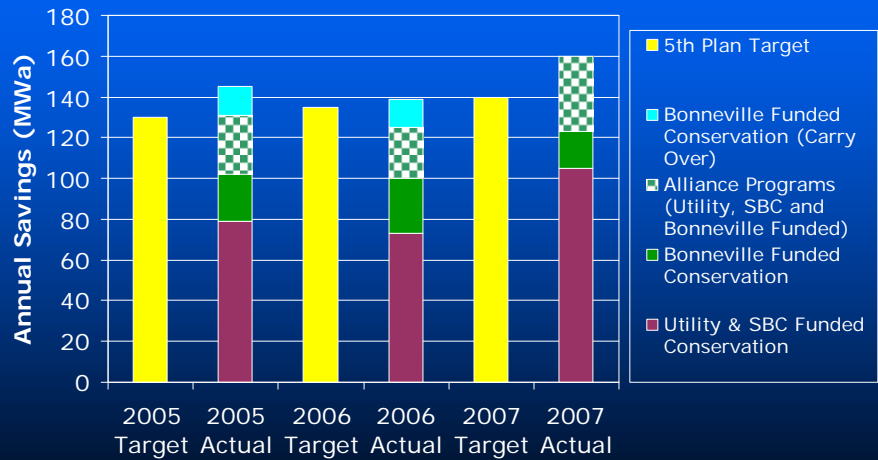


Survey Year	2005	2006	2007
Share of Regional Load	99%	98%	86%
Number of Utilities Covered	107	105	83

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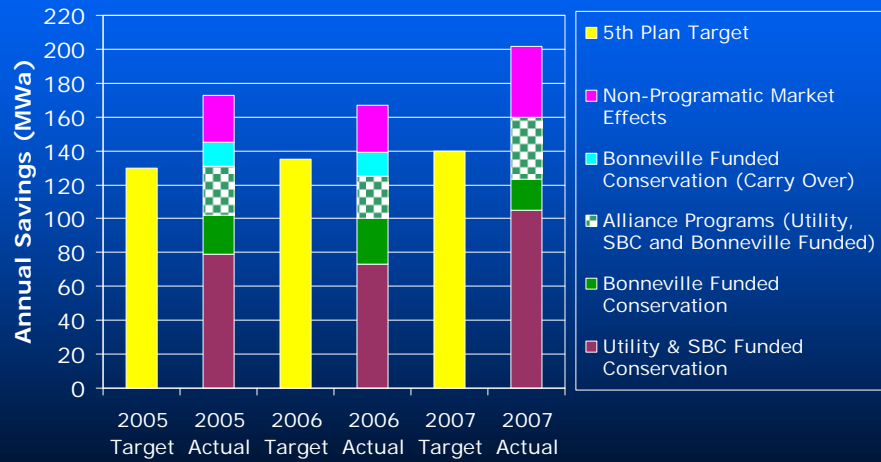
## The Region Is *Exceeding* the 5<sup>th</sup> Plan's Targets With Utility Funded Programs Alone!



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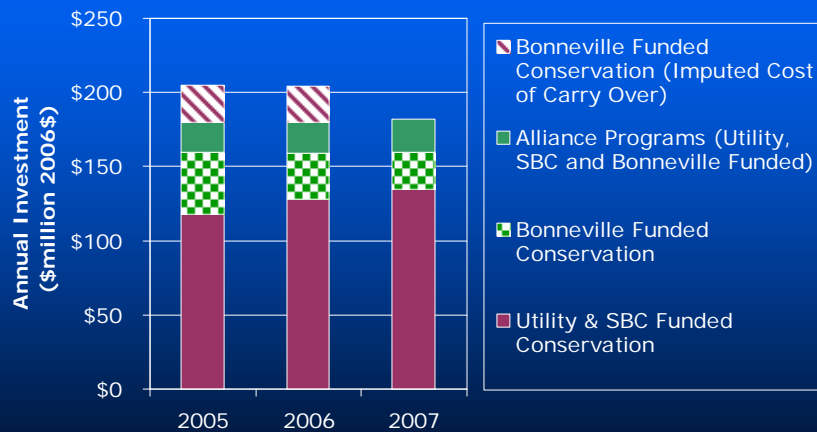
## When Overall Market Changes Are Considered, The Region Set An All Time Savings Record in 2007



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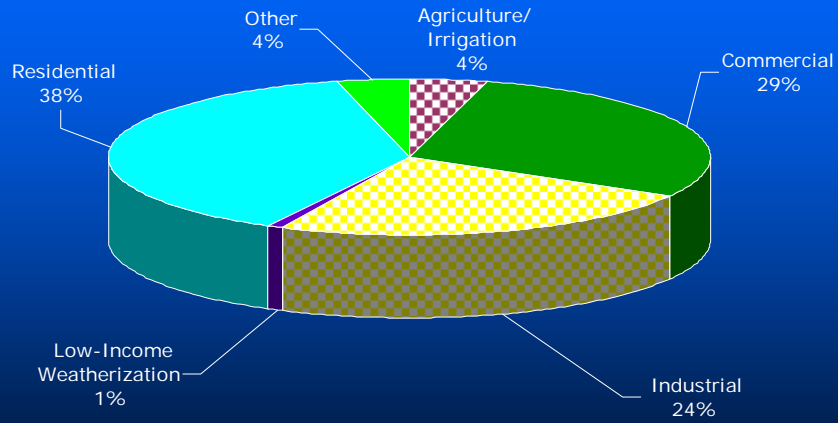
## Regional Utility, SBC Administrator and Bonneville Conservation Investments



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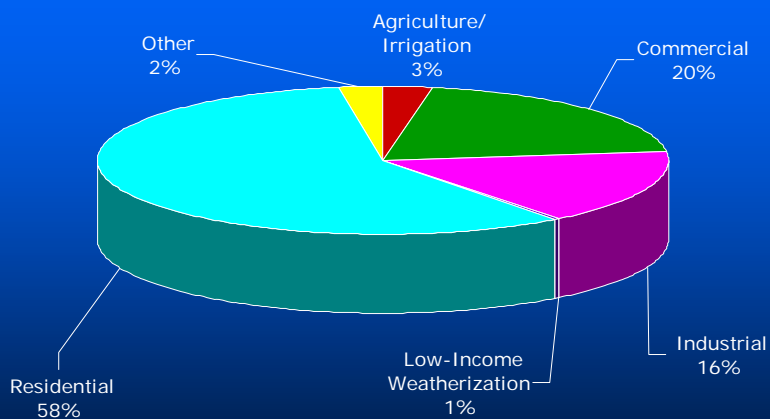
## Distribution of Savings Across Sectors (Excludes NEEA)



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## Distribution of Savings Across Sectors with NEEA

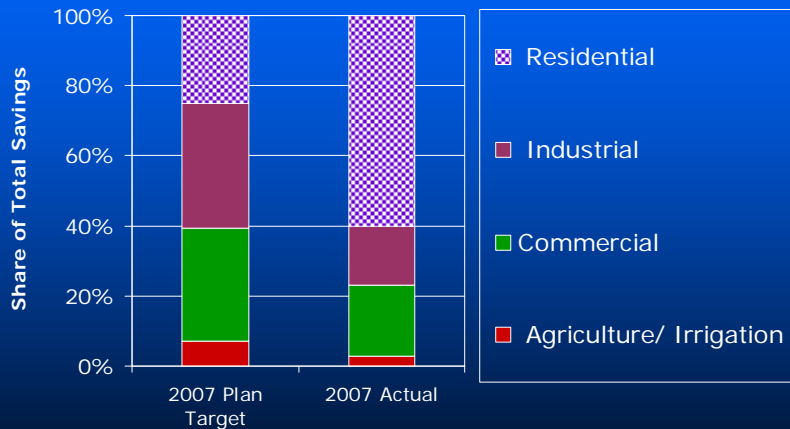


60% of Residential Sector Savings Come from CFLs – This is consistent with 5<sup>th</sup> Plan's Assessment of sector conservation potential

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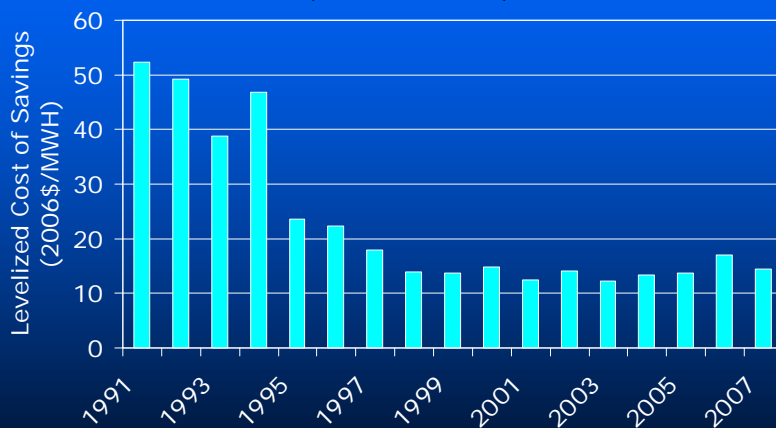
## Residential Sector Savings Comprise Nearly 60% of the Total



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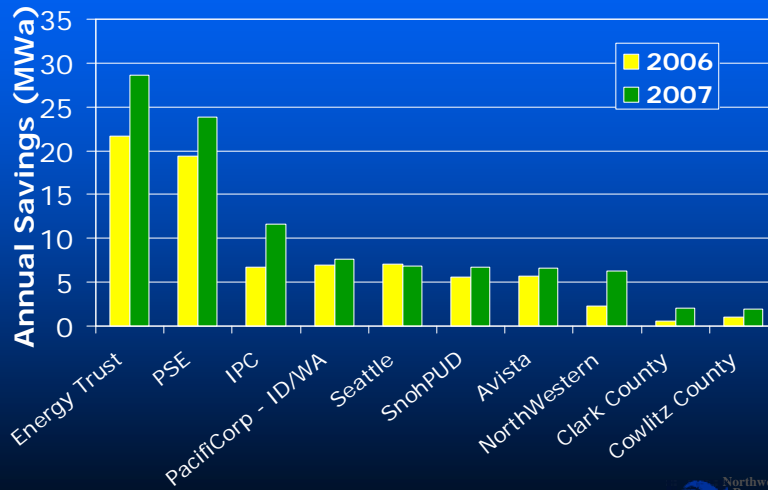
## Utility Cost of Conservation Savings Are Below \$20/MWH (2006\$)



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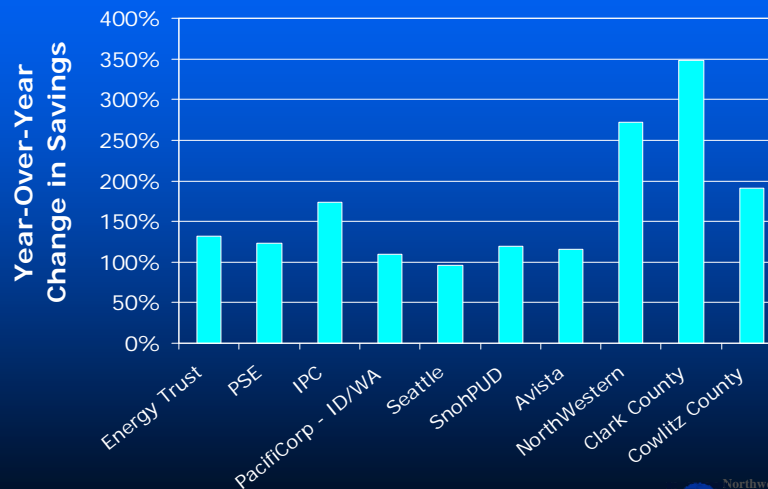
## 10 Largest Utilities/Program Administrators 2007 vs 2006 Savings



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## 10 Largest Utilities/Program Administrators Year-Over-Year Change in Savings



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# Summary

