Purpose

• Diversify the implementation team that delivers Energy Trust’s Residential programs
• Provide info you need to decide if this opportunity is for you

Agenda

• Overview of Energy Trust
• Residential sector background
• Request for proposals goals and schedule
• Program structure and key activities
• Questions & answers
Who is Energy Trust of Oregon?
About us

Independent nonprofit

Providing access to affordable energy

Generating homegrown, renewable power

Building a stronger Oregon and SW Washington

Serving 1.8 million customers of Portland General Electric, Pacific Power, NW Natural, Cascade Natural Gas and Avista

Building a stronger Oregon and SW Washington
Diversity, Equity and Inclusion

DEI Operations Plan

Diversity Advisory Council

Supplier Diversity Program

Engagement, co-creation

Learning from mistakes and successes

Publicly share progress
2020 Savings by Sector

Electric savings:
- Residential: 8.6 aMW
- Commercial: 17.7 aMW
- Industrial: 16.9 aMW

Gas savings:
- Residential: 2.7 MMTh
- Commercial: 2.0 MMTh
- Industrial: 2.4 MMTh
Request for Proposals: Goals and Schedule
RFP Goals

• Contractors who enable us to cost-effectively achieve energy-savings targets

• Drive innovation to meet new opportunities and expand support to customers

• Establish a single PMC to collaborate with PDCs to support targeted elements

• Establish structure to effectively grow DEI objectives
  • Increase diversity of the implementation team
  • Require minimum 20% of contract delivery to be COBID-certified
  • Creative and diverse teaming; COBID-certified prime contractors encouraged to bid
RES RFP Schedule

**January 2022**
- Informational webinar
- Bidder networking event

**April 2022**
- RFP Release/Q&A Period

**June 2022**
- Proposals due

**Q3 2022**
- Selection process, board decision, contracting

**Q4 2022**
- Transition period

**January 1, 2023**
- New contract(s) begins
Program Structure and Key Activities
Who We Serve

• Detached single-family and manufactured homes

• Customers with low- and moderate-income, communities of color and rural customers

• Customers with above moderate-income

• Do-it-yourself customers

• Customers/contractors purchasing at wholesale

• New home builders, home verifiers and new home retailers
Contract Structure

Residential Program

Program Services:
Marketing, Program Administration, Customer Service, Field Services, Budgeting/Forecasting, Measure Development

Home Retrofit
- Detached Single Family Homes
- Existing Manufactured Homes
- New Manufactured Homes
- Community Partner Program
- Manufactured Homes Replacement

EPS New Construction

Midstream & Online

Colors:
- PMC
- PDC

= PMC
= PDC
Contractor Roles & Relationships

Energy Trust Residential Program Staff

- EPS Program Delivery Contractor
  - Subcontractor(s)

- Residential Program Management Contractor
  - Subcontractor(s)

- Midstream & Online Program Delivery Contractor
  - Subcontractor(s)

Direct and ongoing reporting, communication and contract management responsibilities

Indirect or periodic reporting, communication and coordination responsibilities, depending on scope of services
Program Services (PMC)

Residential Program

Program Services: Marketing, Program Administration, Customer Service, Field Services, Budgeting/Forecasting, Measure Development

Home Retrofit
- Detached Single Family Homes
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EPS New Construction
- Manufactured Homes Replacement

Midstream & Online
Program Services (PMC)

• **Marketing**: Account management, integrated marketing and communications strategy, multicultural strategy, campaign planning and execution, creative services, and collaboration with internal and external stakeholders.

• **Program administration**: manage operations to document program activities; support and process incentive applications, facilitate 20,000 annual payments to customers, recognize savings in Energy Trust systems

• **Contact Center**: provide direct engagement with customers through 24,000 annual in/outbound phone calls and 5,800 email communications

• **Field services**: support general outreach and market representation, trade / community ally support, and quality assurance

• **Budgeting/forecasting**: develop annual budget and energy savings goals, forecasting, and reporting activities and integration with Energy Trust systems

• **Measure development**: support engineering analysis, research design and product develop following Energy Trust’s process and technical guidelines
Home Retrofit (PMC)

Residential Program

Program Services: Marketing, Program Administration, Customer Service, Field Services, Budgeting/Forecasting, Measure Development

Home Retrofit

Detached Single Family Homes

Existing Manufactured Homes

New Manufactured Homes

Community Partner Program

Manufactured Homes Replacement

EPS New Construction

Midstream & Online

= PMC

= PDC
Home Retrofit Program (PMC) - Examples

**Product Rebate Offer**
- Customer responds to marketing, contacts trade allies
- Trade allies provide bids and installs improvement(s)
- Customer completes incentive application
- Customer receives incentive payment in 6-8 weeks

**New Manufactured Homes**
- Customer visits participating retailer
- Retailer presents incentive offer & efficiency info
- Customer makes qualifying purchase
- Customer submits incentive form; retailer submits SPIFF form

**Community Partnership**
- Establish relationship with community-based organization (CBO)
- Learn about each other’s goals, capacities, etc.
- Co-develop a community-focused program
- Support CBO’s implementation of program
Single Family Homes (PMC)

- **Program strategy development and execution.**
- **Manage and develop trade ally contractor network and infrastructure to support retrofit participation**
- **Downstream rebates for smart thermostats, energy-efficient HVAC and water heating equipment, and weatherization improvements**
- **Enhanced incentive offers and strategic initiatives reduce customer barriers and increase participation**

**Detached Single-Family Homes:** Strategy support, budgeting/forecasting, reporting, marketing coordination, measure development

- Outreach and regional representation  - Income qualified initiatives
- Trade ally management  - Research and innovation
- Regional initiatives  - Financing
- Rental market engagement  - Coordination with midstream PDC
- Promotions and bonuses
Manufactured Homes (PMC)

- Drive energy savings opportunities to existing manufactured homes residents through standard incentives, promotions, and free services offers installed by trade allies
- Works directly with new manufactured home retailers to influence sales of ENERGY STAR and NEEM+ homes
- Support replacement of vintage manufacture homes for income qualified customers

Program Services: Strategy support, budgeting/forecasting, reporting, marketing coordination

<table>
<thead>
<tr>
<th>New Manufactured Homes</th>
<th>Existing Manufactured homes</th>
<th>Manufactured Homes Replacement</th>
</tr>
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<tbody>
<tr>
<td>- Retailer relationship management</td>
<td>- Trade ally management</td>
<td>- Work with Navigator contractor who supports outreach</td>
</tr>
<tr>
<td>- Facilitate incentive awareness</td>
<td>- Promotion development</td>
<td>- Manage reservation pipeline</td>
</tr>
<tr>
<td></td>
<td>- Manufactured homes park outreach</td>
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</tbody>
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Community Partner Initiative (PMC)

**Summary:** A newer community-focused effort with the goal of expanding inclusivity of offers, especially to people with low and moderate incomes, communities of color and rural communities.

A central tactic includes developing programs to allow for closer collaboration with community-based organizations (CBOs) and other agencies serving their community.

**Program Services:** Strategy support, budgeting/forecasting, reporting, marketing coordination, cross-sector coordination

**Community Partner Funding**
- Outreach & onboarding
- Relationship management
- Contractor connections

**In-Home Energy Assessments**
- Data collection and management
- Training
Midstream & Online Programs (PDC)

Residential Program

Program Services: Marketing, Program Administration, Customer Service, Field Services, Budgeting/Forecasting, Measure Development

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EPS New Construction

Midstream & Online

= PMC
= PDC
Midstream and Online Programs (PDC) - Examples

**Retail Program**
- Customer visits participating store
- Customer sees in-store signage & price discount on efficient product
- Customer makes purchase & receives point-of-purchase incentive
- Retailer reports sales of qualified products

**Distributor Program**
- Customer hires program trade ally (TA)
- TA purchases equipment from participating distributor
- TA receives point-of-purchase incentive
- Distributor reports sales of qualified products

**Online Offer**
- Customer receives marketing with promotional URL
- Customer visits website and receives in-store coupon
- Customer visits participating retailer, makes purchase and redeems point-of-sale incentive coupon
- Retailer reports monthly sales of qualified products
Midstream and Online Programs (PDC)

Key Technologies and Offers
- Smart Thermostats
- Water Heaters
- Lighting/Grow Lights
- Appliances
- Online Energy Assessment
- Gas Fireplaces
- Other Consumer Products

Program Services: Strategy support, budgeting/forecasting, reporting, marketing coordination, measure development support

Midstream (Retail and Distributor)
- Relationship management
- Promotions
- Market analysis

DIY
- Customer education
- Content development & acquisition

Online Offers
- Coordinate with existing online services
- Promotions and online fulfillment
- Coordinate with utilities
EPS New Construction (PDC)

Residential Program

Program Services: Marketing, Program Administration, Customer Service, Field Services, Budgeting/Forecasting, Measure Development

Home Retrofit

Detached Single Family Homes
Existing Manufactured Homes
New Manufactured Homes
Community Partner Program

EPS New Construction

Midstream & Online

Manufactured Homes Replacement

= PMC
= PDC
EPS New Construction Program (PDC) - Examples

**Builder**
- Builder submits plans to verifier
- Verifier provides energy model
- Verifier performs site inspections during construction
- Builder receives incentive based on verified energy performance

**Verifier**
- Verifier enrolls in program
- Verifier performs preliminary energy models and site inspection
- Verifier confirms construction details at final inspection, updates model
- Verifier receives a % of the total project incentive
EPS New Construction Program (PDC)

- Above code performance incentives to builders and verifiers
- Incentives for renewable capable technologies
- Incentives for demand response capable technologies
- Incentives for stand-alone new construction equipment

Program Services: Strategy support, budgeting/forecasting, field services, reporting, marketing coordination, customer service, incentive processing, measure development support

Industry Relationships
- Account management
- Preparing market for code changes
- Expertise in residential energy modeling
- Training

Research & Innovation
- Explore new technologies
- Market analysis

Underserved Customers
- Affordable housing
- Rural areas
- Workforce development
Upcoming Opportunities and Q & A
Upcoming Opportunities

• Networking for Residential Program Implementors and Subject Matter Experts
  • January 20 at 10:00-12:00
  • More info: https://www.energytrust.org/contracting-opportunity-residential-programs/

• Industrial RFP
  • To be released March 2022 for work beginning in 2023
  • Similar goals around supplier diversity and DEI strategies
  • More info: https://www.energytrust.org/about/explore-energy-trust/rfps-rfqs/
Questions and Answers

Tyrone, Thad, Marshall, and Ryan

ResidentialSolicitations@energytrust.org
Appendix
2020 by technology category

ELECTRIC SAVINGS

- **Appliance**: 3%
- **Duct Sealing**: 0%
- **Water Heating**: 21%
- **New Construction**: 7%
- **HVAC**: 16%
- **HVAC Controls**: 10%
- **Lighting**: 40%

GAS SAVINGS

- **Appliance**: 1%
- **Duct Sealing**: 0%
- **Weatherization**: 6%
- **Water Heating**: 10%
- **New Construction**: 16%
- **New Con Market Transformation**: 26%
- **HVAC**: 8%
- **HVAC Controls**: 33%

*NEEA savings not included*
Midstream & Online Offers Contract Structure

Residential Program

Program Services & Home Retrofit PMC

EPS New Construction PDC

Retail PDC

Distributor Program

Online Offers

Retail Program

= PMC

= PDC

= PDC
Midstream & Online Offers Contract Structure

Residential Program

Program Services & Home Retrofit
PMC

EPS New Construction
PDC

Midstream & Online Offers PDC

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EPS New Construction

Retail Program

Legend:

- PMC
- PDC
- PDC