

## Conservation Advisory Council Meeting Notes

May 17, 2023

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### Attending from the council:

Andy Cameron, Oregon Department of Energy  
Charity Fain, Community Energy Project  
Laney Ralph, NW Natural  
Jake Wise, Portland General Electric

Becky Walker, NEEA  
Kerry Meade, NEEC  
Tina Jayaweera, NWPCC  
Anna Kim, Oregon Public Utility Commission

### Attending from Energy Trust:

Hannah Cruz  
Elizabeth Fox  
Elaine Dado  
Debbie Menashe  
Kate Wellington  
Bayo Ware  
Thad Roth  
Dan Rubado  
Themba Mutepfa  
Natalia Ojeda  
Jackie Goss  
Tracy Scott  
Sue Fletcher  
Scott Leonard  
Cory Hertog  
Adam Bartini  
Fred Gordon  
Jeni Hall

Michael Colgrove  
Mark Wyman  
Marshall Johnson  
Andi Nix  
Kenji Spielman  
Alex Novie  
Gina Saraswati  
Sarah Castor  
Ryan Crews  
Amanda Zuniga  
Oliver Kesting  
Steve Lacey  
Amanda Potter  
Lindsey Dierksen  
Sletsy Dlamini  
Tara Crookshank  
Tom Beverly

### Others attending:

John Molnar, Rogers Machinery  
Candice Norton, Resource Innovations  
Henry Lorenzen, Energy Trust board  
Heather Salisbury, CLEAResult  
Jonathon Belmont, Bonneville Power Administration  
Shannon Todd, TRC Companies  
Don MacOdrum, TRC Companies  
Kelly Thomas, Oregon Department of Business and Consumer Services

Peter Kernan, Oregon Public Utility Commission  
Jenny Sorich, CLEAResult  
Kheoshi Owens, Empress Rules  
Peter Therkelsen, Energy Trust board and CAC liaison  
Naomi Cole, Konstrukt  
Cory Fulton, CLEAResult  
Brian Mayfield, CLEAResult

## 1. Welcome and Announcements

Hannah Cruz, senior stakeholder relations and policy manager, convened the meeting at 1:30 p.m. via Zoom. The agenda, notes and presentation materials are available at <https://www.energytrust.org/wp-content/uploads/2023/01/CAC-Packet-May-2023.pdf>.

Hannah announced that Anna Kim from the Oregon Public Utility Commission will soon move to a new role as energy cost manager. After nearly five years as a council member, Anna hopes

for opportunities to make connections, stating that she enjoyed her time on the council as a forum to discuss these topics. A schedule and transition plan are in development as another member of the Oregon Public Utility Commission will attend in her place. The council thanked Anna for her time and contributions to the council and congratulated Anna on her new role.

## **2. Draft Community Agreements**

### *Topic summary*

Hannah Cruz discussed draft community agreements for the council. Establishing community agreements was added to the operating principles during the annual review this past February. Community agreements describe how the council behaves and works together and are important as Energy Trust changes the way it works internally, with stakeholders, program management contractors and external customers. As an advisory body, it's important that the council keep its community agreements in mind during all meetings and conversations.

The agreements are to also guide the behaviors and actions of the facilitator, presenters and participants. Staff drafted the community agreements based on discussions held at the last two council meetings. It is the responsibility for the entire council to agree to and hold to the community agreements.

### *Discussion*

An attendee mentioned that principal community-based efforts have been in Residential and Energy Trust fell short of goals in 2022, particularly on the commercial side and asked if the community-based approach will be used for commercial also (Henry Lorenzen). Staff clarified that these community agreements focus on how the council will operate together, adding that they will help new members know what the expectations are. These do not discuss how the organization works with community-based organizations to serve customers (Hannah Cruz).

Council members stated that the draft agreements are good and capture the previous discussions (Kerry Meade, Andy Cameron). A council member questioning whether the statement around actions that marginalize others means words, or work being done that marginalizes groups. The council also questioned how actions will be identified and addressed, whether they should be called out in the moment, and whether the meeting facilitator will step in (Kerry Meade). Staff responded that these items tie into the section about backgrounds and experiences, leading to different perspectives on how presented information impacts different communities or groups. Council members are encouraged everyone to think of the agreements as "theirs" (Hannah Cruz).

Council members also pointed out a need to balance online interactions vs. in-person, adding that it's easy to overbalance in one direction or the other. People who live outside of Portland and may find it challenging to travel should be kept in mind (Anna Kim). Staff noted appreciation for the comment.

### *Next Steps*

Staff will share the final community agreements and begin utilizing them in meetings going forward.

## **3. Residential Income Eligibility Refinements**

### *Topic Summary*

Marshall Johnson, residential senior program manager, discussed proposed changes to income qualifications for Savings Within Reach. Savings Within Reach provides increased incentives for income-qualified customers to help fill the gap between low-income services provided by other entities like Oregon Housing and Community Services and Energy Trust market rate incentives. It is delivered by trade allies and customers receive incentives as an upfront reduction in project costs. The trade ally is reimbursed upon completion of work.

The initial income qualifications resulted in a narrow band of eligible customers. Requirements were refined to align the floor of the Savings Within Reach incentive to pick up at the ceiling for low-income services, while aligning the Savings Within Reach maximum incentive with the state maximum for moderate income. Energy Trust is considering an increase to maintain these alignments.

#### *Discussion*

Council members asked what the percentage is in AMI (area median income) and SMI (state median income) terms, adding that 200% of the federal poverty level is the same as 60% of SMI (Jake Wise). Staff responded that the 2023 maximum column in the presentation shows 1.2 times the state median income and added that there are pros and cons to using state vs. federal standards (Marshall Johnson).

Community Energy Project (CEP) has a [paper](#) that explains the differences between state median income and federal income and discusses the pros and cons. It's would be advantageous to align with federal Inflation Reduction Act (IRA) rebate programs as it will be easier and less complicated for contractors who want to stack incentives. Council members noted that Energy Trust should consider what's most generous and flexible. People who fall just above the guidelines are often very much in need, especially as costs have increased. Low-income incentives don't cover the full cost of projects due to price increases. There is a lot of deferred maintenance at the low and near low-income levels. Allowing more access to higher incentives provides many benefits (Charity Fain).

An attendee from the Energy Trust board of directors stated that people who qualify for these programs may have less time or resources to learn about Energy Trust programs and asked if there are efforts to design outreach and marketing that communicates about the programs to the people they're designed for (Peter Therkelsen). The council responded it often isn't an issue of time, but they don't have access due to income. Even at moderate income levels, people can't afford the costs. Some groups feel like they shouldn't bother learning more because they don't have enough money and decide the offers aren't for them or their community. Marketing is helpful, but contractors are where the conversations happen (Charity Fain).

Staff added that Energy Trust programs are traditionally delivered by trades. Energy Trust has been successful at engaging higher-income customers. The Savings Within Reach customers often own their own properties and can obtain financing. Energy Trust now works with community organizations like Community Energy Project to assess homes and determine priorities. Priority is now on exploring how we get information to communities and customers who don't have access to community-based organizations (Marshall Johnson).

#### *Next steps*

The discussion will continue at a future meeting when Residential program plans are further along.

## **4. New Homes Program and Billing Analysis**

### *Topic Summary*

Dan Rubado, planning and evaluation senior project manager, and Scott Leonard, residential senior project manager, discussed the recent impact evaluation of the EPS New Construction program. An impact evaluation looks at the value of the savings claimed and compares them against actual results whereas a process evaluation looks at the effectiveness of a program and how it works. This evaluation included three different contracted program implementors: Portland Energy Conservation, Inc., CLEAResult and TRC.

EPS encourages building homes at least 10% beyond code and the average EPS home is over 20% more efficient than a typical newly built home.

The impact evaluation findings indicate that overall, program homes didn't save as much energy as expected, while non-program homes used less energy than expected. This resulted in overall realization rates of 18% for electricity savings and 21% for gas savings.

#### *Discussion*

Council members mentioned that there are options for what happens with a code-based home vs. a program home and asked if Energy Trust had questioned builders about what they would have done without the program (Tina Jayaweera). Staff responded that there are base cases for what needs to happen within code. If a builder decides to do something different on a code home, it could come in through on the data. Oregon Building Codes Division has indicated similarly. Staff added that a small number of large volume builders who stated that the program influenced what they do were engaged. Builders wouldn't have gone above code without the influence of the program. The builders interviewed generally believed that other unenrolled builders were also building above code based on program influence in the market (Dan Rubado).

Energy Trust board of directors attendees asked about the extent of the EPS New Homes program's contribution to avoided cost savings in the Residential program, adding that it appeared to be about 25% on average between Pacific Power and Portland General Electric. Board member attendees also expressed concern about the accurate prediction of usage among code homes and that Energy Trust is claiming greater benefits than are being achieved (Henry Lorenzen). Staff responded that the savings percentage is higher for gas than electric utilities (Scott Leonard). The EPS program is primarily a gas-focused program with more than 80% of the homes being heated by gas. Staff added that there's some calibration needed in the modeling, and another issue occurs where builders may be building above code in code homes (Dan Rubado).

The council encouraged Energy Trust to look at market transformation influence. Northwest Energy Efficiency Alliance (NEEA) has a lot of influence on code and can also share an updated logic model. NEEA is looking at the influence of its own code program which may be helpful. With Regional Building Stock Assessment data, it may be possible to help look at characteristics in these models (Becky Walker). Staff stated that NEEA's code compliance studies are very helpful, and hope they'll continue (Scott Leonard). Staff added that the real purpose of NEEA and Energy Trust working together is market transformation and influencing code. When code is updated in a year or two, the difference between these homes and market baseline will disappear. The evaluation is important, but it should be interpreted within the context of market transformation. Staff noted market influence isn't the goal after with this evaluation. There are unit savings but also influence on builders. There is more work to do in connecting the dots (Fred Gordon).

#### *Next Steps*

New measure development, updating to the code, will happen next. Interested stakeholders can follow along through the budget process. Changes made to modeling or the design of the program will go into effect Q4 2024 at the earliest.

## **5. HB 2531 Update**

### *Topic Summary*

Hannah Cruz provided a brief update on HB 2531, a bill that prohibits the sale and distribution of certain compact fluorescent light bulbs and linear fluorescent lights. The bill has passed the House and its Senate policy committee. It awaits a final reading and vote in the Senate, which

is complicated by the multi-week Republican senator walk-out. At this stage in the session, Energy Trust is proceeding with plans as if the bill will pass. If passed, there is a significant savings impact to the business lighting initiative and customer impact on smaller businesses.

If adopted, changes will take effect on January 1, 2024 for CFLs and January 1, 2025 for linear fluorescents.

*Discussion*

None

*Next Steps*

Staff will provide an update during the fall budget and action plan presentations.

**6. New Buildings Program Update**

*Topic Summary*

Alex Novie, community and new initiatives sector lead, briefly summarized the New Buildings topic that will be covered at the next council meeting.

Commercial building code has changed, giving building owners and developers many more options to meet or exceed code. New Buildings focuses on support to push buildings beyond code, including training and education, technical support and early design support. The program has operated under an Oregon Public Utility Commission exception for some time due to the inability to assess baseline costs; the exception is not due to an issue with above-code buildings not being cost effective. With unlimited options to meet it, the new code makes it nearly impossible to determine baseline costs.

The program is looking at ways to expand the use of building science in the market, and ways to provide more building design resources for customers who might not otherwise have design teams. At the next council meeting, staff will discuss the findings of market research that is concluding soon.

*Discussion*

No discussion due to meeting time limitations.

*Next Steps*

Topic will return in June.

**7. Member Announcements, Suggestions for Future Meetings, Public Comment**

There was no additional public comment.

**8. Adjournment**

The meeting adjourned at 3:30 p.m. Meeting materials are available [online](#). The next meeting of the council will be June 28, 2023. It will be a two-part, hybrid meeting and will also include lunch and networking with the Diversity Advisory Council and Renewable Energy Council.