

Conservation Advisory Council Meeting Notes

July 10, 2024

Attending from the council:

Laney Ralph, NW Natural
Corinne Olson, AWEC
Noemi Ortiz, Cascade Natural Gas
Lisa McGarity, Avista
Jonathon Belmont, Bonneville Power
Administration
Charity Fain, Community Energy Project
Andy Cameron, Oregon Department of
Energy

Peter Christeleit (for Becky Walker),
Northwest Energy Efficiency Alliance
Jake Wise, Portland General Electric
Kari Greer, Pacific Power
Kerry Meade, Building Potential (formerly
NEEC)

Attending from Energy Trust:

Hannah Cruz
Alex Novie
Tom Beverly
Elizabeth Fox
Scott Leonard
Alicia Moore
Sarah Castor
Danielle Rhodes
Melanie Bissonnette
Laura Schaefer
Maddie Norman
Debbie Menashe
Natalia Ojeda
Willa Perlman
Kearstin Estrada
Adam Shick
Cameron Starr
Kirstin Pinit
Jackie Goss
Greg Stokes
Elaine Prause
Isaiah Kamrar
Spencer Moersfelder

Andi Nix
Michael Hoch
Marshall Johnson
Kate Wellington
Maddy Otto
Thad Roth
Ryan Crews
Abi Sloan
Kenji Spielman
Julianne Thacher
Sue Fletcher
Emily Findley
Dan Rubado
Shelly Carlton
Leila Shokat
Lidia Garcia
Akanksha Rawal

Others attending:

Henry Lorenzen, Energy Trust board
Brooke Landon, CLEAResult
Dave Beaulieu, TRC
Steph Berkland, TRC
Candice Norton, Resource Innovations

Don MacOdrum, TRC
Kheoshi Owens, Empress Rules
Jeff Cropp, TRC

1. Welcome and announcements

Alex Novie facilitated the meeting with Hannah Cruz. Alex convened the meeting at 1:30 p.m. via Zoom. Meeting agenda and presentations are available online at <https://www.energytrust.org/wp-content/uploads/2024/07/CAC-Packet-July-2024.pdf>.

Tracy Scott, director of energy programs, gave an update on the New Buildings RFP process. Energy Trust has selected CLEAResult to be the New Buildings program management contractor, with a new contract for January 1, 2025, through December 31, 2029.

Alex Novie announced Tracy Scott was recently confirmed to the Portland Clean Energy Community Benefits Fund (PCEF) committee by Portland City Council.

2. Residential insulation

Topic summary

Marshall Johnson, senior Residential program manager, discussed proposed changes to residential insulation incentives. Energy Trust has provided insulation incentives for more than 20 years. Incentives were capped in 2014 due to declining avoided costs for natural gas. In 2020, staff looked for ways to encourage trade allies to install insulation, and there has been strong demand for attic insulation since then.

Avoided costs for natural gas have gradually increased, making insulation in gas heated homes cost effective. There was also an OPUC exception to cost effectiveness to allow Energy Trust to support income-qualified and energy-burdened households.

Discussion

The council asked how incentive amounts were set, if they will only apply to Oregon customers and whether projects will exceed 4,500 at current activity levels (Kellye Dunn, Jake Wise). Staff responded the increases only apply to Oregon but noted the potential for more investment in moderate income gas furnaces in Washington. Staff stated the 4,500 projects is at current volume, but it is expected to ramp up with a greater impact in 2025. The council noted the budget impact isn't bad given the savings increase (Lisa McGarity).

The council expressed some support for the increases (Kerry Meade, Jake Wise) and also questioned how customers are currently targeted and to what extent Energy Trust is able to forecast potential savings impacts. It also asked what coordination will happen with utilities to identify properties in need (Kerry Meade). The council expressed interest in leveraging data from energy assessments to target the right customers (Jake Wise). Staff responded existing insulation levels have to be right for homes to qualify. Energy Trust leverages trade allies to promote these offers. They are sometimes geo-focused offers. Energy Trust also uses a combination of customer personas and housing characteristics, along with census data, to look for higher energy usage. There are some regional offers because large numbers of customers align with income requirements in certain areas.

The council noted the increases don't impact community partners and priority customers won't benefit from them; incentives covering 75% of insulation project costs won't help customers with lower incomes (Charity Fain). The community partner or trade ally needs to have a more concrete idea of how much the incentive will cover. Making access easier and more consistent will lead to greater uptake (Charity Fain).

Next steps

Staff will continue discussions internally and bring additional updates to the council as they are available.

3. Contractor Development Pathway

Topic summary

Cameron Starr, senior customer experience strategies manager, provided an update on the Contractor Development Pathway (CDP). CDP was launched in 2021 to support more diverse participation in the Trade Ally Network. Energy Trust just completed its third cohort with the Existing Buildings program and plans to launch a unified residential and commercial cohort in 2025.

Contractors are selected to participate each year. They develop action plans to help grow their businesses, attend training on business development, are matched with mentors and attend recurring mentorship meetings. They receive support for energy-efficiency projects. The benefits are increased knowledge, peer mentorship, a network of support and business development services. Mentorship shortens the learning curve and significantly increases business success rates. Matching includes preferences, demographics and skill sets. Session topics include estimating and bidding, SWOT analysis, attracting skilled employees and more. Business development funds of \$4,000 is available for things that directly impact and improve their businesses like trailering equipment, office equipment, advertising and marketing. Staff noted that Energy Trust worked with PBDG, NAMC, LatinoBuilt and other community partners to develop the program and fine tune, along with gathering feedback.

The trade ally resource network provides financial and accounting consultations, website design and support, marketing consultation, project estimating and business plan development. This is new and provided by contract companies working directly for Energy Trust. Community Energy Project was just funded to provide training in this capacity.

Discussion

The council called this a great program, noting the mentor side of the approach is appreciated as new contractors often need that mentoring (Charity Fain). The council added the approach is great in terms of helping businesses but expressed curiosity in how Energy Trust helps them attract and retain talent, as it is challenging (Jonathan Belmont). Staff responded there are two pieces: Building a worker pipeline and building capacity to support projects. Energy Trust doesn't focus on building the worker pipeline right now but will soon with the addition of as workforce development manager.

The council asked if Energy Trust could share anecdotal engagement data, acknowledging the offer is still in development (Lisa McGarity). The council also asked if community partners are included in the trade ally interviews, as they are a good source of feedback (Jake Wise). Staff gave some examples, such as one participating trade ally having three projects the first year, six in the second year and 14 in the third. Another new contractor coming in has done 13 projects this year. Another participated, then became a mentor.

Next steps

None.

4. Eastern Oregon Economic Summit

Topic summary

Caryn Appler, senior outreach manager, provided an overview and highlights from the recent Eastern Oregon Economic Summit, an annual event put on by the Eastern Oregon Women's Coalition. It originated from local business owners and officials seeing legislators vote on items that deeply impacted their businesses without much knowledge of on-the-ground impacts. The purpose of the summit is to evolve state-wide understanding of challenges and opportunities in rural Oregon, explore areas of public and private partnership and establish connections for local leaders and community-based organizations. Key topics from this year's event included partners addressing residential energy burden, innovative technology to support sustainable and resilient food systems, transportation electrification and resilient infrastructure, climate change and water systems, renewable energy and economic diversification, integration of traditional and indigenous knowledge with climate-smart tech, sustainable tourism and recreation.

Discussion

The council expressed appreciation for the event summary and Caryn's contribution (Becky Walker) and an interest in connecting to learn more (Jonathon Belmont).

Next steps

None.

5. Cooling updates*Topic summary*

Kate Wellington, senior program strategies manager, and Andy Cameron, energy efficiency and conservation manager with Oregon Department of Energy (ODOE), discussed the Landlord Provided Cooling Space (LPCS) initiative and other cooling programs and studies ODOE is leading. LPCS has been in the market for two years now, and ODOE has agreed to extend through the end of 2025. It funds community cooling spaces created for multifamily properties or manufactured home parks to offer relief for five or more residents during extreme heat events. Energy Trust offers technical support for equipment, incentives and options for hardwired and plug-in solutions. To date, 85% of projects have reached environmental justice communities. Equipment has primarily been hardwired systems such as heat pumps and ductless heat pumps.

Energy Trust identified barriers to participation amid slow initial uptake. Cost, program complexity, marketing and outreach needs, technical requirements and lack of suitable spaces were all challenges. In response, the program implemented enhanced marketing, targeted outreach support, combined equipment solutions, added an option to assign payment to trade ally installers and streamlined the exceptions process to offer more flexibility. The tiered incentive structure ended June 1, and the offer now covers up to the full cost for all customers. The focus remains on priority populations through targeted marketing and outreach.

Andy Cameron discussed ODOE cooling programs. This was a different space for ODOE since it dealt with health and safety, rather than energy. A recently completed cooling study commissioned by ODOE did a deep dive into specific housing types to determine what's needed to bring cooling to them. Publicly supported multifamily housing, agricultural housing, manufactured home parks and RVs were included.

Discussion

The council stated this is impactful work and the outcomes are good to see, asking if the work will continue after 2024 (Jake Wise). The LPCS contract included a one-time process of funds through Energy Trust; the extension didn't include additional funds since the initial project volume was low and funds still need to be distributed. The council pointed to a data distribution opportunity if ODOE is connected to NEEA (Becky Walker).

Next steps

None.

6. Adjournment

The meeting adjourned at 3:53 p.m. The next meeting will be held Wednesday, September 11, 2024, at 1:30 p.m.