Home Energy Solutions
Savings Within Reach

Conservation Advisory Council
August 12, 2009

EnergyTrust of Oregon

Overview

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Continuous Evaluation

Contact Information

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Savings Within Reach

Purpose

- To help homeowners access energy efficiency upgrades that would otherwise have difficulty paying. Homeowners who:
  - don't qualify for free low-income weatherization,
  - *but* don't have significant disposable income.
- To reduce out-of-pocket expense for the participant, with higher Energy Trust incentives paid as a discount on the contractor invoice

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Savings Within Reach Eligibility

- Single-family homes and plexes up to four units whose occupants meet moderate income requirements.
- Home does not have to be owner-occupied, but owner must give permission for participation.
- Home heating fuel must be from Portland General Electric, Pacific Power or Cascade Natural Gas.
- Income guidelines are gross amounts

Household Size	Minimum	Maximum
1 person	$ 21,660	$ 27,075
2	$ 29,140	$ 36,425
3	$ 36,620	$ 45,775
4	$ 44,100	$ 55,125
5	$ 51,580	$ 64,475
6	$ 59,060	$ 73,825
7	$ 66,540	$ 83,175
8	$ 74,020	$ 92,525
Each additional person	$ 7,480	$ 9,350

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Savings Within Reach Measures

Energy-efficient upgrade	Maximum Incentive
Attic insulation	$550
Wall insulation	$550
Floor insulation	$550
Ductless heat pump	$550
High-efficiency heat pump upgrade	$550
High-efficiency heat pump (when replacing an existing electric furnace)	$750
High-efficiency gas furnace	$550
Duct sealing	$400
Duct leakage test	$35
Air sealing	$350
Air leakage test	$35

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Participating Contractor Requirements

- Energy Trust of Oregon Trade Ally
- Ready to conduct blower door tests for all participants
- Focus recommendations on what is most cost-effective for the participant
  - First: Air Sealing
  - Second: Insulation
  - Third: HVAC
- Provide a two-year parts and labor warranty on SWR measures
- Timely response to missing information requests, Quality Control corrective actions and to other participant or Energy Trust requests

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Additional Requirements

- Air Sealing and Ventilation training is required unless you are an Energy Trust of Oregon Home Performance contractor (BPI certified)
- Professionalism at the participant site and in communicating with SWR staff is required. Unprofessional behavior is cause for immediate removal from the participating contractor list.
- 2 major corrective QC actions and/or failures to qualify, or 5 minor corrective QC actions, is cause for immediate removal from the participating contractor list.

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Participating Contractors

Invitation and Selection Process

- Contractor information session – July 27, 2009
- Deadline to Apply – August 3
- Selection Committee – August 5
- Contractors Notified – August 8
- Kick-off Meeting – September 1

Selection Criteria, in addition to requirements, includes:

- Thorough Home Energy Solutions knowledge
- Geographic location
- Acceptable Quality Control history
- History of working with low income
- Customer service orientation

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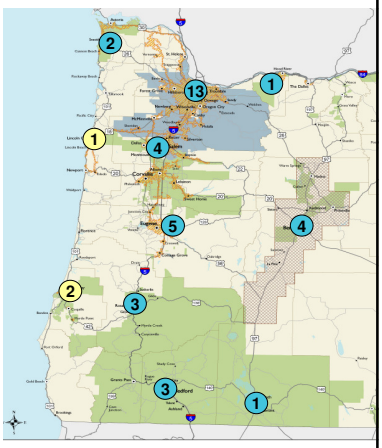
Contractor Applicants

- 39 Applicants
- 9 of 11 Energy Trust regions represented
- 11 have bilingual and/or trilingual staff: Russian, Spanish, Chinese
- 14 have perfect QC histories
- Many already collaborate with CAP agencies
- 19 selected who must attend kick off before offering incentives



Blue = Applied by deadline
Yellow = Current Outreach

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Customer Participation – Marketing

- Some Targeted Mailings to potential participants
  - Depends on contractor coverage
  - Targeted to census blocks based on income levels
- Participating Contractor initiated campaigns
- Fact Sheet
- www.energytrust.org/savingswithinreach
- Community Action Agencies
  - Handouts
  - Education
- Marketing materials will be in both English and Spanish.

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Customer Contact Center

Triage and Prequalification

- Participant contacts Energy Trust, verifies eligibility
- Participant can choose to take contact information for participating contractors, or to be contacted by one
- Energy Trust provides HER information to contractor, if available

NW Natural Customers

- Directed to call NW Natural Affordable Energy Efficiency Program at 1-866-513-8274

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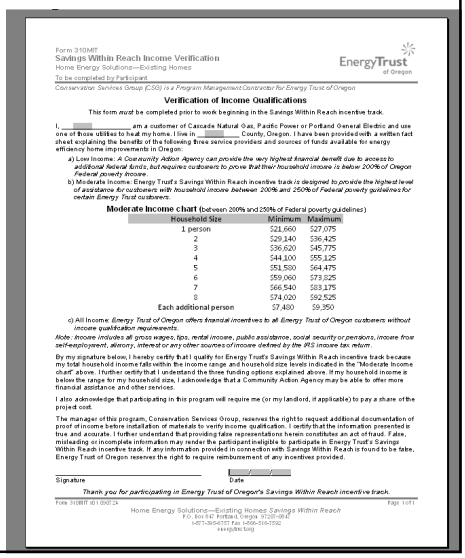
Income Verification

- Participant signs 310MIT Savings Within Reach Income Verification form



Form 310MIT
Savings Within Reach Income Verification
Home Energy Solutions—Existing Homes

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To be completed by Participant

Conservation Services Group (CSG) is a Program Management Contractor for Energy Trust of Oregon

Verification of Income Qualifications

This form *must* be completed prior to work beginning in the Savings Within Reach incentive track.

I, _____ am a customer of Cascade Natural Gas, Pacific Power or Portland General Electric and use one of those utilities to heat my home. I live in _____ County, Oregon. I have been provided with a written fact sheet explaining the benefits of the following three service providers and sources of funds available for energy efficiency home improvements in Oregon:

a) Low Income: *A Community Action Agency can provide the very highest financial benefit due to access to additional federal funds, but requires customers to prove that their household income is below 200% of Oregon Federal poverty income.*

b) Moderate Income: *Energy Trust's Savings Within Reach incentive track is designed to provide the highest level of assistance for customers with household income between 200% and 250% of Federal poverty guidelines for certain Energy Trust customers.*

Moderate Income chart (between 200% and 250% of Federal poverty guidelines)

Household Size	Minimum	Maximum
1 person	$21,660	$27,075
2	$29,140	$36,425
3	$36,620	$45,775
4	$44,100	$55,125
5	$51,580	$64,475
6	$59,060	$73,825
7	$66,540	$83,175
8	$74,020	$92,525
Each additional person	$7,480	$9,350

c) All Income: *Energy Trust of Oregon offers financial incentives to all Energy Trust of Oregon customers without income qualification requirements.*

Note: Income includes all gross wages, tips, rental income, public assistance, social security or pensions, income from self-employment, alimony, interest or any other sources of income defined by the IRS income tax return.

By my signature below, I hereby certify that I qualify for Energy Trust's Savings Within Reach incentive track because my total household income falls within the income range and household size levels indicated in the "Moderate Income chart" above. I further certify that I understand the three funding options explained above. If my household income is below the range for my household size, I acknowledge that a Community Action Agency may be able to offer more financial assistance and other services.

I also acknowledge that participating in this program will require me (or my landlord, if applicable) to pay a share of the project cost.

The manager of this program, Conservation Services Group, reserves the right to request additional documentation of proof of income before installation of materials to verify income qualification. I certify that the information presented is true and accurate. I further understand that providing false representations herein constitutes an act of fraud. False, misleading or incomplete information may render the participant ineligible to participate in Energy Trust's Savings Within Reach incentive track. If any information provided in connection with Savings Within Reach is found to be false, Energy Trust of Oregon reserves the right to require reimbursement of any incentives provided.

_____ Signature _____ Date

Thank you for participating in Energy Trust of Oregon's Savings Within Reach incentive track.

Form 310MIT 01/05/04 Page 1 of 1

Home Energy Solutions—Existing Homes *Savings Within Reach*
P.O. Box 848 Portland, Oregon 97207-0848
1-877-365-4737 Fax 1-866-516-7592
energytrust.org

Home Assessment Protocol

- Contractor uses HER checklist to identify energy saving measures if it is available
- Air Leakage test is required prior to bidding
- Other visual or diagnostic inspection, as appropriate
- Contractor provides recommendations and a bid considering payback period and participant desires

Measure Installation

- Measures installed as requested by participant
- Contractor can subcontract if needed to complete work
  - HVAC, plumbing, insulation, etc
  - Standard HES incentives must go through regular processing
- Contractor discounts Energy Trust incentives from total bill

Processing and Payment

- Contractor submits for reimbursement of incentive discounts
  - Reimbursement paid to Participating Contractor, not to subs
- Incentive applications must be received within 60 days of the last measure being installed
- Reimbursement within 4-6 weeks of receiving a qualifying, complete application, which includes:
  - A signed Income Verification form
  - A complete and signed incentive application
  - All supplementary info, including PTCS forms
  - A copy of the participant's invoice, with incentives discounted from total paid by the participant (does not have to be paid before submitting)

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Incentive Application

- Contains clauses that allow us to accept invoices that haven't been paid yet
  - Helps contractor cash flow
  - Ensures participant is satisfied with work
  - Ensures the attached invoice is the full contract with the participant for the work completed

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Continuous Evaluation

Quality Assurance and Control

- 25% in year 1, 10% thereafter
- Customer Satisfaction Surveys
- Energy Trust Weatherization Specifications Manual, 2009

If…

- We find new opportunities in moderate income homes, we may add new incentives.
- Participants are being overcharged, we may set maximum pricing
- We receive additional funding, we may add participating contractors.
- We are on pace to over-subscribe, we may require pre-registration.

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Savings Within Reach
Launches
September 1!

Questions, Comments, Feedback?

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