

Conservation Advisory Council Agenda

Virtual meeting

Wednesday, July 29, 2020

1:30 p.m. – 3:45 p.m.

To join the Zoom meeting, register at this link: <https://zoom.us/meeting/register/tJwvf-mrpzMoE9OeaTQ9iqgg-T9jM0ETCPfY>. After registering, you will receive a confirmation email containing information about joining the meeting.

1:30 Welcome

- Zoom housekeeping info
- Introductions (host will list who is attending the meeting, unmute yourself when called on and say hi)
- Approve June meeting notes
- Member updates

1:40 Update on residential cost-effectiveness exception for ductless heat pumps *(consult)*

Staff will provide background to the OPUC's approval of a residential ductless heat pump cost-effectiveness exception, and an update on expected unit installations this year, which may exceed earlier estimates due to a potential new collaboration in Southern Oregon.

Presenter: Marshall Johnson (15 min)

1:55 Recent and upcoming changes to energy efficiency measures *(information)*

As part of our continuous measure improvement process and program response to COVID-19, staff will present on recent or upcoming changes to incentive levels or equipment requirements in the Existing Buildings, Residential and Existing Multifamily programs. This includes new bonus offers.

Presenters: Marshall Johnson and Kate Wellington (20 min)

2:15 Next steps with showerheads *(information and discuss)*

Energy- and water-saving showerheads have traditionally been part of Energy Saver Kits, multifamily direct installation and existing and new commercial building offers. Recently, the NW Power and Conservation Council's Regional Technical Forum deactivated the measure as savings per unit have decreased over time, and Energy Trust is considering next steps for our programs.

Presenters: Alex Novie and Dan Rubado (15 min)

2:30 Break (10 min)

2:40 New Buildings cost-effectiveness workshops *(information)*

Workshops continue to be held to determine a pathway forward for this program as the state moves forward with higher efficiency levels in the energy code. Staff will provide an update on the most recent workshop and next steps.

Presenter: Jay Olson (10 min)

2:50 Community Engagement Guidelines development *(consult)*

Staff will present development to-date in establishing Community Engagement Guidelines for the organization. These guidelines will be used by staff in determining with a community how Energy Trust can support their clean energy goals. This will be an interactive session to get your feedback.

Presenters: Sue Fletcher and Ryan Crews (30 min)

3:20 2021 Budget Engagement Schedule *(information)*

Staff will review the 2021 budget engagement schedule, highlighting when the Conservation Advisory Council will be engaged and opportunities for your feedback.

Presenter: Melanie Bissonnette (10 min)

3:30 Energy Trust Support for PCEF Applicants *(information)*

Energy Trust is preparing support resources for potential Portland Clean Energy Community Benefits Fund applicants. This will be an update on those resources.

Presenter: Hannah Cruz (10 min)

3:40 Public comment

3:45 Adjourn

Meeting materials (agendas, presentations and notes) are available [online](#).

Next meeting: There is no August meeting. Our next meeting is September 16, 2020.

Conservation Advisory Council Meeting Notes

June 17, 2020

Attending from the council:

Alyn Spector, Cascade Natural Gas
Anna Kim, Oregon Public Utility
Commission
Julia Harper, Northwest Energy Efficiency
Alliance
Jess Kincaid (for Dave Moody), Bonneville
Power Administration
Jason Klotz, Portland General Electric
Kari Greer, Pacific Power

Kerry Meade, Northwest Energy Efficiency
Council
Lisa McGarity, Avista
Rick Hodges, NW Natural
Tim Hendricks, BOMA
Wendy Gerlitz, NW Energy Coalition
Warren Cook, Oregon Department of
Energy
Charlie Grist, Northwest Power and
Conservation Council

Attending from Energy Trust:

Hannah Cruz
Alex Novie
Cameron Starr
Thad Roth
Peter West
Amber Cole
Tyrone Henry
Julianne Thacher
Spencer Moersfelder
Fred Gordon
Amanda Davidowitz
Jay Ward
Marshall Johnson
Tom Beverly
Greg Stokes

Wendy Gibson
Amanda Zuniga
Ryan Crews
Debbie Menashe
Mana Haeri
Jessica Kramer
Kathleen Belkhyat
Michael Colgrove
Peter Schaffer
Sue Fletcher
Oliver Kesting
Amanda Potter
Quinn Cherf
Jackie Goss

Others attending:

Lindsey Hardy, Energy Trust board
John Molnar, Rogers Machinery
Elee Jen, Energy Trust board
Shelly Beaulieu, TRC
Whitney Rideout, Evergreen Consulting
Dan Tillis, Cascade Natural Gas
Andrea Estrada, ICF International
William Rector, BPA
Ted Drennan, NW Natural
Misti Nemes, CLEAResult
Joe Marcotte, TRC
John Eicher, ICF

Erik Holman
Dave Backen
Emily Pierce, Evergreen Consulting
Matt Doyle, NW Natural
Ellie Hardwick, SBUA
Susan Badger-Jones, Energy Trust
Diversity Advisory Council
Karla Hendrickson
Jenny Sorich
Angel Swanson
Matt Arndt, Rogers Machinery

1. Welcome and Introductions

Hannah Cruz convened the meeting at 1:30 p.m. The meeting was held as a video conference. Prior council meeting notes are posted [online](#) and the council accepted them with no changes. The meeting was recorded.

Hannah Cruz started the meeting with a discussion on Black Lives Matter and racial justice, prominent topics and areas of conversation across the nation, in Oregon and at Energy Trust. Staff and board members have reflected on the current situation and want to be cognizant and accountable for their decisions and actions that have reduced benefits for the Black community.

Lindsey Hardy read the board's statement in support of Black Lives Matter:

As a public service institution, we recognize our role in perpetuating systems of inequity. The recent killings of George Floyd, Breonna Taylor and Ahmaud Arbery and ensuing protests have brought our nation's history of systemic racism to the forefront of our national dialogue.

Condemning racism and affirming that Black and Brown people deserve safety, respect and equity is acknowledging a basic human right. We hear our fellow citizens demanding an end to institutionalized racism, and we stand with them.

We have a long way to go to realize our vision of clean, affordable energy for everyone. As we work toward this vision, we are allied with our advisors, staff and community partners active in social justice and racial equity. We pledge to learn, to take responsibility, to do better.

Some resources we're finding helpful in our learning are <http://www.dismantlingracism.org> and the [Oregon Education Association's Black Lives Matter resources list](#). Portland Mercury's recent article, [Things You Can Do to Support the Black Community and Promote Anti-Racist Efforts](#), includes links to Black-owned business directories, organizations focused on racial justice issues, and educational resources.

Lindsey Hardy said the word "allies" is not static. As the organization goes forward, it will need to continue practicing allyship and learning from its partners, stakeholders and communities, using its platform as a megaphone for voices that need to be heard.

Council members said they are glad to be on the receiving end of this work, and that while Energy Trust is well ahead of other organizations, it is behind on actually doing the work. It's a good place to be (Warren Cook). They supported the board statement and said it's heartening to see that Energy Trust is engaging and being supportive of Black Lives Matter, adding this group isn't diverse. There is some representation, but it needs to do better (Alyn Spector). Old white men who are in their bubbles need this type of leadership to keep focused and it's time for old schoolers to wake up in all forums and relationships (Charlie Grist).

Council members said this is a journey that needs to continue and can't just be dropped (Julia Harper). They said it's important to understand how conversations impact unrepresented groups and to seek help in asking the right questions in order to be inclusive (Lisa McGarity).

Hannah Cruz noted there was an hour-long discussion with staff a week ago; these are not easy conversations. Staff wants to make changes and looks forward to hearing from the Diversity Advisory Council.

Tyrone Henry said the theme of his high school in Washington, D.C. was "Wake up everybody." Moving to Oregon was a shock, leaving a place where 70% of people looked like him for a state where 5% of people looked like him. People have told him he's a great ambassador to his culture. What does it take for all of us to take a stand and speak up when we see social injustice, no matter what world we operate in? If you are fortunate enough to have diverse friends, give them a call and ask how they are doing, he said. Let them know that you stand with them, stand behind them, and in front of them to help.

2. Energy Trust Draft 2021 Goals

Topic summary

Hannah Cruz covered 2021 goals in a presentation and opened them for discussion with council members for feedback. Goals are developed in the spring and finalized in time to guide staff in the summer when developing program and support group budgets and action plans. Last year, the council said it would like to have earlier input in the process. Staff planned for that earlier engagement this year, but the coronavirus pandemic and technical issues forced staff to cancel a joint workshop planned for April with the Renewable Energy Advisory Council and Diversity Advisory Council. Next year staff will look again to engage the council earlier in the process.

Discussion

Council members said meeting generation and savings targets are top priorities; equally important is recognizing diversity among customers and meeting their energy efficiency needs (Lisa McGarity). Trying to overcome barriers customers are facing is also important. Finding links within the state climate action plan is another priority. Being at the table and representing joint customers' interests in that conversation is important (Lisa McGarity).

If Energy Trust is not able to respond to ongoing limitations related to COVID-19, that's a fundamental problem with meeting goals in general (Julia Harper). Dealing with cost-effectiveness issues in meeting diversity goals will be important to innovatively meet these goals (Julia Harper).

Members noted the Trade Ally Network is how Energy Trust connects with people. People in some communities have more trust in those who look, feel and act like them. Diversity among trade allies will make the organization more successful in reaching communities. Connecting with other similar organizations will help amplify each other's work and help both organizations stretch their budgets further.

Members noted it's in times of stress where new things get invented. Energy Trust was created in such a time. Making progress on the COVID-19 response and diversity, equity and inclusion will take creativity (Charlie Grist). It's important to support staff and the Trade Ally Network in fostering innovation because it's these stressful times where innovation can flourish.

Other members said all areas are important, so it's challenging to focus on a few of them (Kerry Meade). Goal No. 3 was important before and will be even more so working remotely. No. 6 will be critical for long-term change to happen. If Energy Trust is successful in changing how customers use energy, it will need to work with community planning to address challenges communities are facing (Kerry Meade).

Energy Trust's primary motivation is to capture savings on behalf of customers in areas where it works, and customer focus and diversity are essential (Wendy Gerlitz). Energy Trust will need to adapt to COVID-19 for the safety of all. Everyone can work with a utility on housing and development, but trade allies will be key, as will support for staff (Rick Hodges).

Coordination is very important. COVID-19 recovery will be a big deal and it's OK to make a big adjustment. New metrics will be essential, as will conversations with the OPUC about adjusted, realistic goals (Warren Cook).

Members also supported goals related to getting outside of the energy efficiency community and into the broader community and supporting the state's policies (Jess Kincaid).

Anna Kim of the OPUC said these goals were developed when there was a very different view of the future. That will be an important consideration for the OPUC looking at this year's goals and shaping them for next year. Given the OPUC's understanding and desire to be fair about how it approaches goals for this year, focus will be on a productive response to helping ratepayers who are suffering and Energy Trust's ability to pivot.

Next steps

Staff will take this feedback into consideration when drafting budgets and action plans, which will be reviewed in draft form by the three advisory councils, the board and the public at a workshop in October.

3. Progress Toward 2020 Diversity, Equity and Inclusion Participation Goals

Topic summary

Tyrone Henry introduced a discussion on progress toward 2020 organizational diversity, equity and inclusion goals for energy efficiency programs. These goals are part of Energy Trust's broader Diversity, Equity and Inclusion Operations Plan. Each sector presented progress so far. Presentations are included in the meeting packet online.

Discussion

Council members asked how Energy Trust defines "very rural." Alex Novie said the USDA developed rural-urban commuting area (RUCA) codes that classify census tracts using measures of population density, urbanization and daily commuting. Energy Trust used the RUCA codes in the 2018 Diversity, Equity and Inclusion Data & Baseline Analysis to categorize census tracts on a 1 to 5 scale, with 1 being very urban and 5 being very rural. This is intended to represent areas where businesses would have little access to services and may experience gaps in trade ally availability. For Existing Buildings, the past participation analysis found the biggest difference in participation for all Commercial customers in very rural areas (5 on the scale). The Industrial participation goal focuses small and medium Industrial customers in areas outside of very urban areas (2-5 on the scale) based on historically lower participation for Industrial customers in these areas.

Council members asked if there is information about the hosted events that took place last year. Staff said there was a progress report attached to Energy Trust's 2019 Annual Report that includes that information. Members asked what else could boost participation (Lisa McGarity). Staff said based on the TLED pilot in Eastern and Southern Oregon, staff need to reach out to customers to understand which ones had not moved forward and what would help them move forward. Staff also gained insights into the baseline technologies for those customers and found many had older technology in their businesses.

Council members noted in smaller communities, word of mouth is an effective behind-the-scenes marketing approach (Lisa McGarity) and encouraged staff to share findings on what works in reaching these segments, geographies and populations (Charlie Grist).

Next steps

Hannah Cruz will share a link to the 2019 Annual Report to the OPUC and the progress report.

4. Planning for Energy Trust's Inaugural Rural Workshop

Topic summary

Sue Fletcher provided an update on Energy Trust's plans to host a workshop focused on rural needs. The workshop fulfills a requirement in the OPUC's annual performance measures for the organization and supports diversity, equity and inclusion goals.

Discussion

Council members asked about availability of broadband access for hosting online versions of these workshops. Sue Fletcher said that will be an important consideration since some staff members have experienced spotty connections. Staff is considering whether every community be able to do a virtual event

Members asked to be kept informed as their organizations are facing the same bandwidth and travel issues (Jess Kincaid) and offered their support (Alyn Spector). They suggested a good source of information on broadband would be the local schools (Lisa McGarity).

Next steps

Sue Fletcher will reach out to BPA and the utilities as staff finalize the location and agenda for the workshop.

5. Update on Energy Trust Response to Coronavirus

Topic summary

Each sector summarized Energy Trust's response to the coronavirus pandemic, including increased incentives and bonuses, engaging more partners and community-based organizations and moving customer-oriented operations to virtual platforms.

Discussion

Council members said they heard positive feedback from schools regarding bonuses (Warren Cook) and asked why multifamily bonuses that end in December aren't being extended (Lisa McGarity). Staff said that was to allow extra processing time to get them out by the end of the year and to accommodate any processing delays due to the coronavirus and remote work. There is an automatic exception in case they submit through December 31.

Next steps

None.

6. Trade Ally Network Survey Results

Topic summary

Cameron Starr discussed results from Energy Trust's trade ally survey on COVID-19 impacts to contractors.

Discussion

Council members said it was heartening to see nearly 70% of businesses anticipate hiring back to pre-COVID-19 levels.

Next steps

None.

7. Commercial Sector Updates

Topic summary

Oliver Kesting offered Commercial sector updates. The request for proposals for Existing Buildings and business lighting went out just before the pandemic hit. Staff extended due dates

based on current events and gave an extra month for bidders to submit proposals. Staff is reviewing bids now and will have recommendations to the board by August 13.

This RFP rolls together Existing Buildings and Existing Multifamily. It separates the delivery of lighting for both Existing Buildings and Production Efficiency into a separate contract. There is a significant focus on diversity, equity and inclusion, including budget allocations for certain types of subcontractors.

New Buildings was impacted significantly by code change in 2019. Staff received a cost-effectiveness exception through the end of 2021. The new state energy code presents challenges in determining the cost of the baseline, which is used to determine measure level cost effectiveness. Determining a pathway forward is complex and may require changes to program requirements.

Energy Trust is working with the OPUC to assess how to best support and leverage the new code and holding workshops with the OPUC, NEEA and Oregon Department of Energy. Staff will engage stakeholders, the design community and this council later in the process.

Discussion

None.

Next steps

Hannah Cruz will provide council members with Oliver Kesting's contact information if they would like to participate in the New Buildings program workshops.

8. Residential Program Changes

Topic summary

Marshall Johnson provided Residential mid-year measure updates.

Discussion

Council members asked how the program is verifying the employment aspect of the new Savings Within Reach requirements. Staff said not all households impacted by COVID-19-related unemployment will qualify for state unemployment benefits. The requirements are structured so that a household that is eligible to receive unemployment assistance or help through community-based resources could qualify for the Savings Within Reach incentives.

Council members asked about pricing for the new window incentives, noting windows are an example of an upgrade that carries non-energy benefits like comfort and beauty (Warren Cook). Staff said the range is \$0 to \$26. Glass, films and frame are the efficiencies. Certain wood frames make it more difficult to reach a high efficiency range. Staff worked with the OPUC in setting these incentive amounts.

Next steps

None.

9. Final Updates

Hannah Cruz noted the City of Portland's Portland Clean Energy Fund's first request for proposals opens in August. Eligibility and requirements are currently out for public comment and available online. The city is accepting comments through June 26. Energy Trust staff has been thinking about how the organization can support PCEF and nonprofit grantees.

10. Public Comment

There were no public comments.

11. Adjourn

The meeting was adjourned at 4:20 p.m. The next Conservation Advisory Council meeting will be held virtually and is scheduled on July 29, 2020.



Residential Ductless Heat Pump Cost-effectiveness Exception Update

Conservation Advisory Council
July 29, 2020

Incentive Changes (*updates effective April 2; slide from February meeting*)

Residential Incentive	Previous Level	Updated Level (April 2, 2020)
Standard	\$800	\$500
Multifamily properties (2+ units)	\$800	\$800
Savings Within Reach / Single-family Rental	\$1,000	\$1,000
Single-family Rental Fixed Price Promotion (9-12K BTU)	\$1,750	\$1,750
Targeted Load Management (TLM)	\$1,800	\$1,800
Single-family Rental Fixed Price Promotion (15-18K BTU)	\$2,000	\$2,000
Community Partner	\$1,500	\$2,000
Single-family Fixed Price (only in Eastern Oregon)	\$2,000	\$2,000

Requirement Changes (*slide from February meeting*)

- Reinforce the incentive is based specifically on the savings from offsetting electric resistance heat in the primary area of the home through:
 - Update application form to better track installation location and presence of supplemental heat
 - Reinforce scenarios where incentive does not qualify
 - Update installation specifications manual
 - Increase rates of quality assurance
 - Provide customer education support



Additional Impacts – Supplemental Fuels (*slide from February meeting*)

- Launching new DHP measure to better quantify savings in homes with supplemental fuel (primarily wood)
- Enhanced incentive pathways face cost-effectiveness challenges with Utility Cost Test for a very small number of DHP applications
 - Estimated at 2% of all DHPs, ~10% of enhance incentive pathway



South Central Oregon Economic Development District (SCOEDD) Opportunity

- EPA funds:
 - 140 single-family homes (HVAC and weatherization)
 - Beginning October 2020
 - \$1.8 million over 5 years
- ~ 85% of participants expected to meet HUD low-income qualification
- Energy Trust assessing levels of support for gas furnaces, fireplaces and DHPs
- Issue:
 - DHP incentive for supplement fuels is \$500
 - Savings Within Reach incentive is \$1,000

Discussion Question

The OPUC exception for DHPs in homes with supplemental heat allows paying the Savings Within Reach incentive level of \$1,000 for homes with wood heat, but will lead to more homes using this measure than was envisioned when the Utility Cost Test cost-effectiveness exception was requested.

Using the excepted measure allows us to serve low-income households, and to improve the understanding of wood-heated homes reported through our program forms. These benefits come with a nominal risk to the program level cost effectiveness.

Do CAC members feel that the benefits warrant use of the UCT excepted measure of \$1,000 for income-qualified homes?



Thank You

Marshall Johnson

Sr. Program Manager, Residential

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Midyear Program Updates

Conservation Advisory Council

July 29, 2020

Agenda

- Existing Buildings New Measures
- Gas Furnace Bonus
- Insulation Bonus
- Direct Install Ceiling Insulation
- Targeted Load Management

Existing Buildings: New Measures

- Heat pumps in small/medium businesses
 - Ducted and ductless in spaces < 10,000 sq. ft.
- Commercial heat pump water heaters
 - Covers majority of the market but are classified as residential units by AHRI
- Pre-rinse spray valves
 - Small energy savings, but works for customer with electric or gas water heat
 - Targets foodservice – often found in smaller communities and diverse communities
- Advanced Rooftop Controls (ARC) retrofit
 - Retrofit application in addition to existing measure for new rooftop unit controls

Gas Furnace Bonus

Program	Current Incentive	Bonus Incentive	Total Incentive
Residential	\$550	\$450	\$1,000
Multifamily	\$300 + \$250	\$450	\$1,000

- Available September 1, 2020, through March 31, 2021
- Requirements: income-qualified customers through Savings Within Reach, single-family rental properties and certain multifamily residences—including duplex, triplex, fourplex or side-by-side properties (such as a townhouse or rowhome)
- Additionally, *Campaign Ally* solicitation to support fixed price promotions

Insulation Bonus—Multifamily and Residential

- Attic/ceiling insulation eligibility extended to include single-family homes, starting September 1, 2020, through March 31, 2021
 - Multifamily insulation bonuses also extended through March 31, 2021

Equipment	Property Types	Base Incentive	+ Bonus Incentive	Total Incentive
Attic/Ceiling Insulation	For single-family, side-by-side, duplex, triplex and fourplex properties only	\$0.25 per sq. ft.	\$1.00 per sq. ft.	\$1.25 per sq. ft.

Direct Install Ceiling Insulation

Existing Condition	Incentive
R-0 to R-11	up to \$2.40/sf
R-12 to R-19	up to \$1.65/sf

- Intended to support low/no-cost insulation for ceilings and/or attics to reduce space conditioning energy consumption
- Requirements: insulate from eligible existing condition to R-38
- Delivery: Community partners (community-based organizations, low-income agencies) and delivered promotions
- Programs: manufactured, single-family and certain multifamily residences—including duplex, triplex, fourplex or side-by-side properties (such as a townhouse or rowhome)

Targeted Load Management

Pacific Power – Targeted Load Management		
Energy upgrade	Increased incentive amount	Standard incentive amount
Ducted heat pump	\$1,800	\$700
Ductless heat pump	\$3,000	\$800
Attic insulation	\$1.75 per sq ft	\$0.30 per sq ft
Wall insulation	\$1.25 per sq ft	\$0.25 per sq ft
Floor insulation	\$1.00 per sq ft	\$0.30 per sq ft
Windows U-value 0.30 – 0.28*	\$4.00 per sq ft	\$1.75 per sq ft
Windows U-value 0.27 – 0.25*	\$8.00 per sq ft	\$4.00 per sq ft
Windows U-value 0.24 and below*	\$15.00 per sq ft	\$6.00 per sq ft

*Bolded measures launching August 1, 2020

Targeted Load Management

NW Natural – Targeted Load Management		
Energy upgrade	Increased incentive amount	Standard incentive amount
Gas furnace	\$1,000	N/A
Windows U-value 0.24 and below	\$8.00 per sq ft	\$6.00 per sq ft
Attic insulation	\$1.50 per sq ft	\$0.30 per sq ft
Wall insulation	\$1.25 per sq ft	\$0.25 per sq ft
Floor insulation	\$0.60 per sq ft	\$0.30 per sq ft

*All measures launching August 1, 2020



Thank You

Marshall Johnson,
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Kate Wellington
Program Manager - Commercial
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New Buildings Program Code Alignment Conservation Advisory Council

July 29, 2020

Recap

2019 updated code: ASHRAE 90.1
Appendix G

OPUC granted a two-year cost-effectiveness exception through 2021

Solutions workgroup established



Solutions Working Group Formed

Internal and external stakeholders

3 workshops held with common goal to agree on scope and approach

Explored a spectrum of changes and solutions



Next Steps

Generate models for buildings

Cost consulting

Validate cost effectiveness





Thank You

Jay Olson

Sr. Program Manager – New Buildings

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Photo: Mural in Newburg, OR

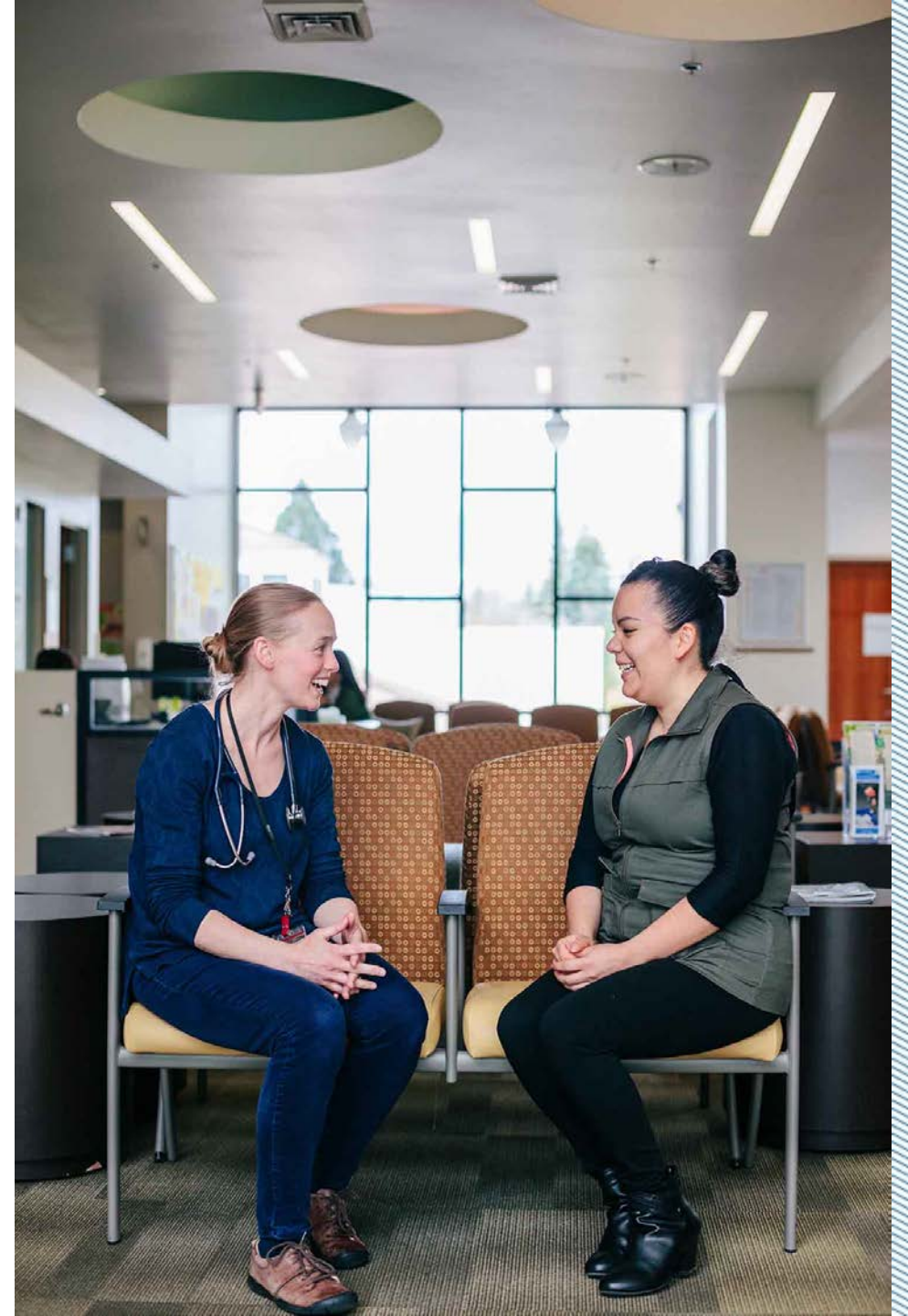
Community Engagement Guidelines

Advisory Council Discussion

July 29, 2020

Agenda

- Definitions
- Project
- Current examples
- Community input
- Council feedback





Project Definitions

Energy Trust programs are structured by customer type – this project helps us think about our work as it relates to communities

- **Community**

- **a group of people united by at least one but perhaps more than one common characteristic**, including geography, ethnicity, shared interests, values, experience or traditions.

- **Community Engagement**

- **the process of working collaboratively** with and through groups of people affiliated by geographic proximity, special interest, or similar situations to address issues **affecting the well-being of those people**

- **Community Engagement Guidelines**

- 2020 project at Energy Trust to learn how we can best support and build on existing tools and resources to engage community and community-based organizations in energy offers
 - Focus on geographic communities

Benefits of Community Engagement

Working directly with communities we achieve multiple benefits.

Community engagement:

- Expands participation
- Leverages other resources/funds
- Maximizes impact
- Addresses community needs
- Builds on community expertise and connections

Project Formation

Opportunity to reach customers through community-led energy efforts and through community-based organizations

- Not currently set up to respond effectively to all opportunities and be proactive

Identified in board and organization plans and documents:

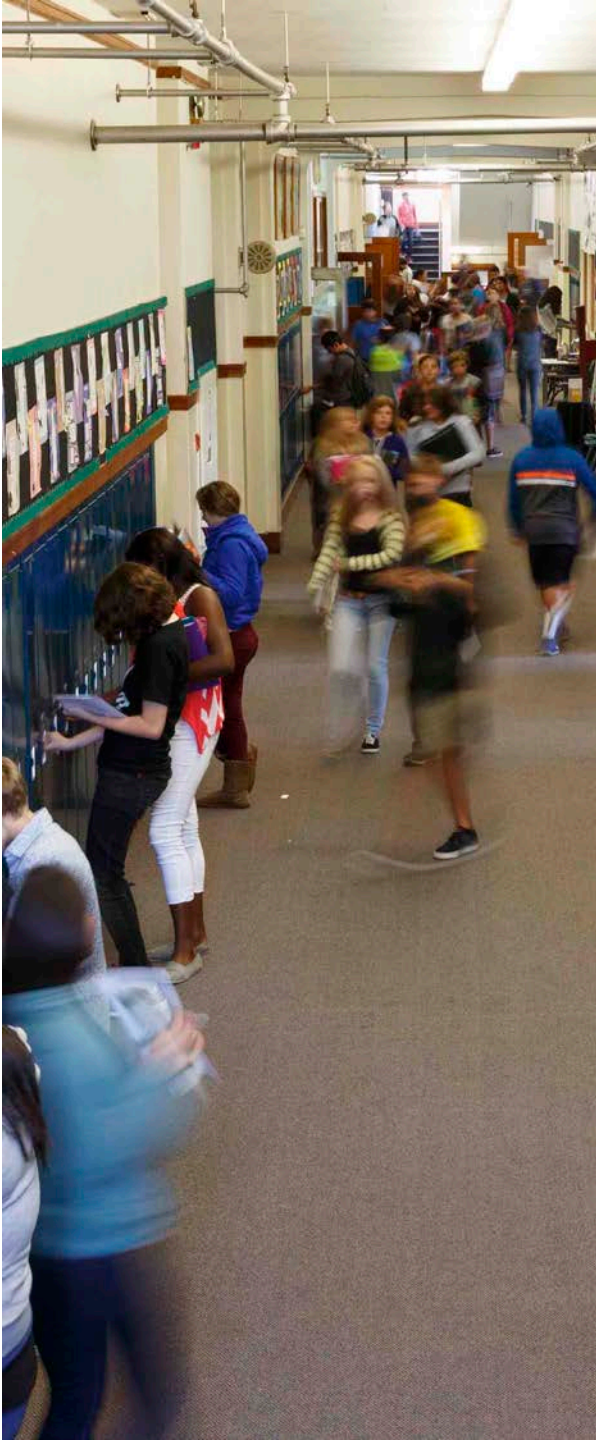
- Board Learning Topic - Community Engagement (2018)
- DEI Operations Plan (2019-2020)
- Strategic Plan (2020-2024)
- Annual Goal (2020)
 - *Develop guidelines for resource investments in community efforts, engaging stakeholders for input*



Learning from Current Efforts

Current community efforts shape how we expand and support future efforts

- City energy plans and data requests led to standard city and county reports
- Initial community-based collaborations paved way to more streamlined approaches
 - Verde, Community Energy Project contracts and agreements
 - Community action agencies
 - LMI solar working group
 - Community Partner Funding
 - Light bulb giveaways
- Potential requests from Portland Clean Energy Fund applicants supported by open house, data, access to staff

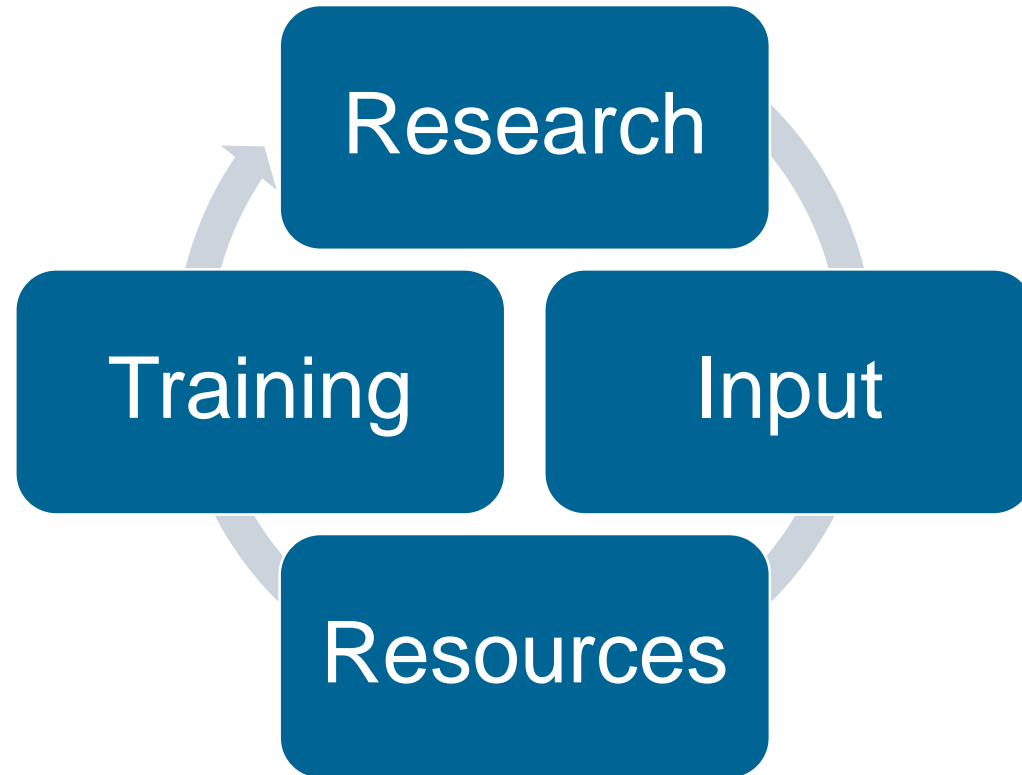


Energy Trust Resources for Communities

- **Information:** Data, information and connections
- **Program Incentives:** For efficiency and renewable generation
- **Customer Engagement:** Outreach support and materials
- **Other Support:**
 - **Staff time:** Expertise and guidance on energy-related projects and plans
 - **Funding:** Resources provided to community-based organizations or communities to accomplish energy objectives

Project Steps

Enhancing and expanding work with communities is not limited to this project or this year. Ongoing effort to support communities and staff seeking to engage.



Question

What we have been asking:

What are top priorities for your community?

For Council: What are you hearing about priorities for communities and do they relate to energy? (type your answers in the chat)

Community Feedback – Prioritization of Energy Issues

- Energy, energy efficiency and renewable energy may or may not be a top priority for a community
- Energy efficiency and renewable energy may be identified as a priority as it relates to other community interests
- Energy is important in my community for:
 - Ensuring access/affordability to energy and energy benefits, particularly those living in rural communities, with lower-incomes and Black, Indigenous and people of color
 - Economic development and opportunity
 - Community resilience
 - Creating energy plans; meeting climate change goals
 - Development of solar, community solar and other renewable resources
 - Ensuring individual and public safety
 - Improving health
 - Advancing affordable housing

Community Feedback – Successful Approaches

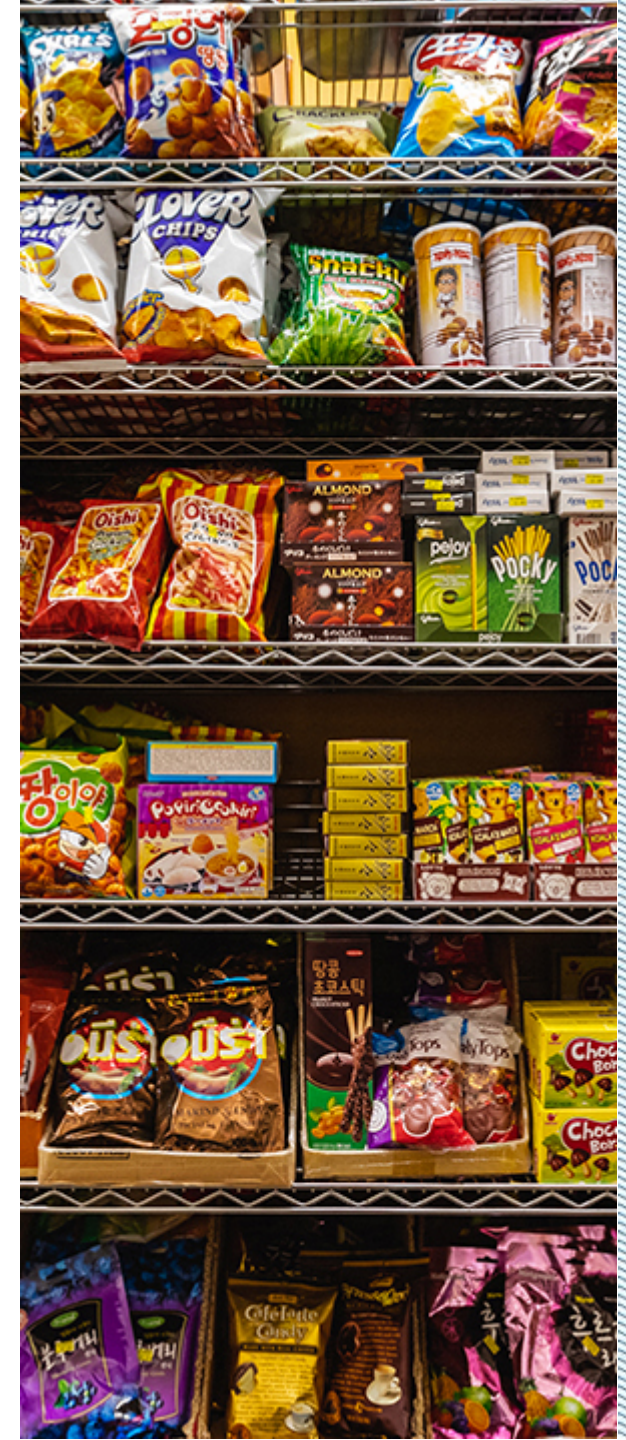
- Communities have limited time and seek partners ready to successfully engage
- Some elements of success:
 - Do your homework about the community and needs
 - Make connections, bring other organizations to the table
 - Translate your resources into direct benefits and solutions
 - Be honest and humble – use mind and heart to build relationships
 - Be flexible and adaptable; willing to take a backseat
 - Deliver on what is promised
 - Begin with small, visible projects and build from there
 - Allow time to develop and sustain relationships

Community Engagement Guidelines

- No one tool or tool set used by other organizations
- Various tools in practice, need adapting to fit specific needs
- Shouldn't be a barrier to prevent or limit engagement

For this project, team is assembling:

- Community engagement principles
- Tool to assess and compare opportunities
- Summary of Energy Trust resources for communities
- Templates from past and current community efforts
- Staff training



Engagement/Questions

- Do you have experience with tools to support community engagement efforts? Any you would recommend?
- How does your organization support its work with communities? Or if you are a community organization what you have seen be successful.
- How do you balance resources with needs?



Thank you

Sue Fletcher

Sr. Communications & Customer Service Manager

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Ryan Crews

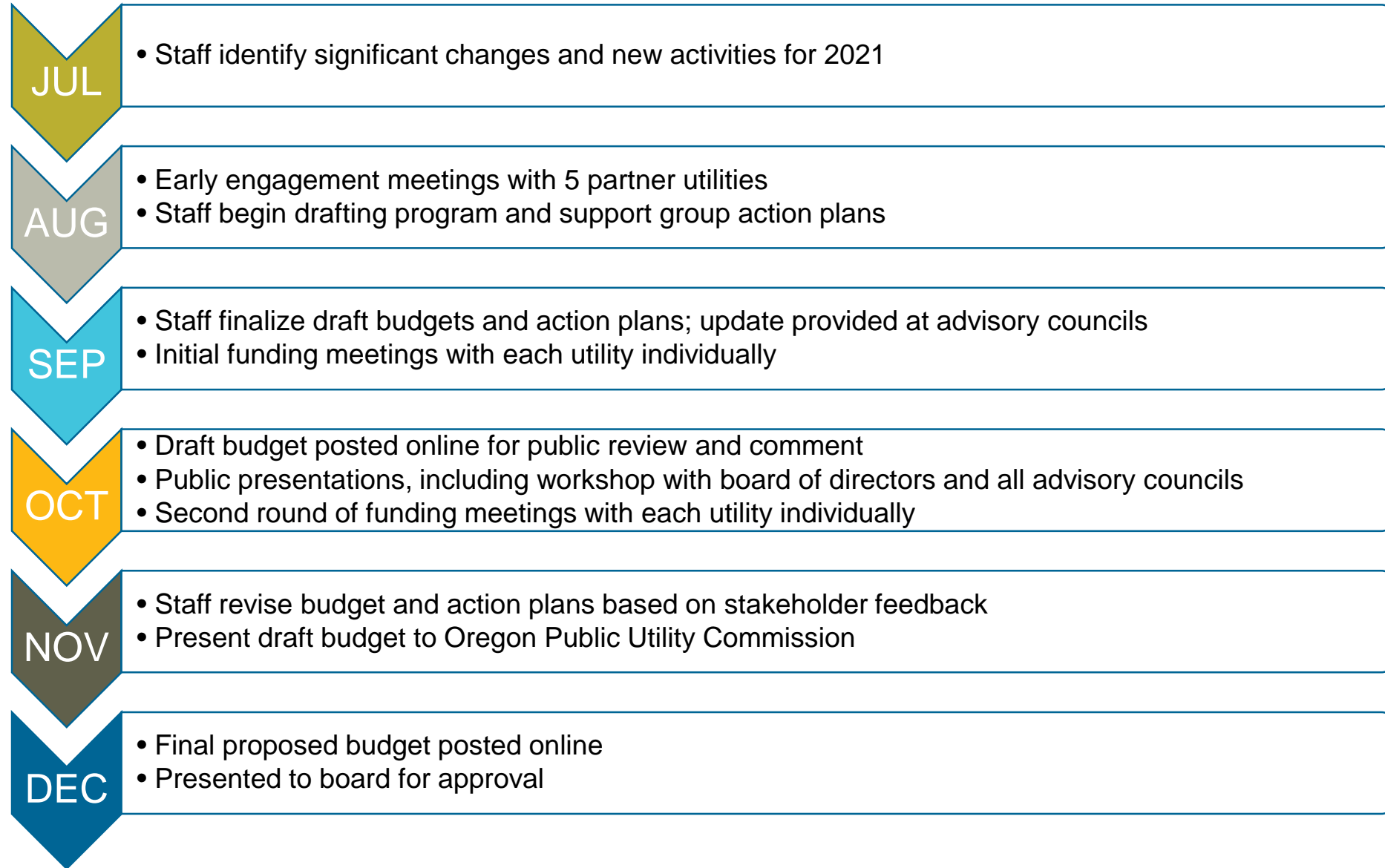
Program Manager – Residential Market Channels

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2021 Budget Engagement Conservation Advisory Council July 29, 2020

2021 Budget Schedule Overview



CAC Budget Engagement Opportunities

Discuss and weigh in on key activities in draft program action plans

September



Attend budget workshop to provide input on draft budget

October



Discuss major revisions to draft budget and hear public comment summary

November



Budget Schedule Key Dates

October & November

10/7: draft budget online

10/7: public comment opens

10/14: recorded presentation online

10/14: public budget workshop

10/28: public comments due

11/12: OPUC public meeting

December

12/4: final proposed budget online

12/11: board action on final proposed budget

www.energytrust.org/budget



Thank You

Melanie Bissonnette

Sr. Project Manager – Operations

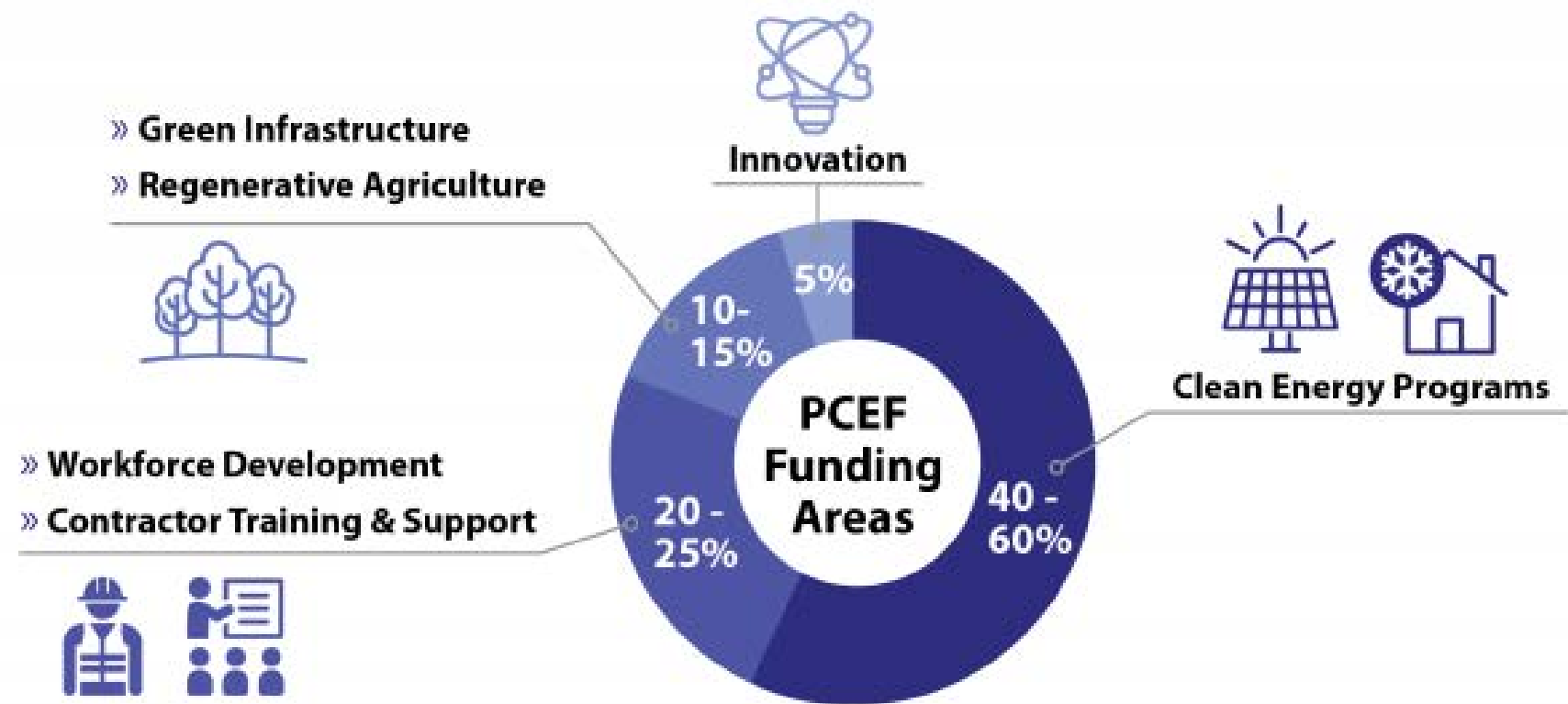
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Energy Trust Support for Portland Clean Energy Fund Applicants

July 29, 2020

Portland Clean Energy Community Benefits Fund: Investment in 4 Key Areas



PCEF Program

- Application support funds
 - Up to \$5,000 in funding to help small organizations build their capacity and to prepare to submit an application
 - Closes July 31
- Grant solicitation timeline
 - Grant solicitation release: mid to late August
 - Grant types: planning grants, small grants, large grants
 - Applications due date 60 days later
 - Grant awards announcement: December 2020 or early 2021
- All details, dates and updates on their website
www.portland.gov/bps/cleanenergy

Energy Trust Support Examples

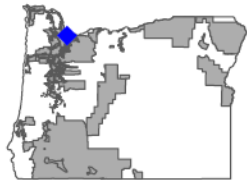
- Information on energy efficiency and solar technologies
- Data on past participation in our programs
- Information on our incentives for utility customers, including amounts and project requirements (possible helpful if referencing our incentives as part of your proposal funding approach)
- Budgeting and forecasting support for clean energy projects or delivery approaches
- Referrals to peer organizations or potential partners
- Letters of support
- Possibly co-market a funded project
- Review proposal designs, implementation approaches, evaluation frameworks

Energy Trust Energy and Demographics Reports



ENERGY TRUST OF OREGON CITY REPORT: PORTLAND

Created June 15, 2020



Energy Trust of Oregon is an independent nonprofit organization serving Oregon customers of Portland General Electric, Pacific Power, NW Natural, Cascade Natural Gas and Avista (the gray areas on the map above). Energy Trust is funded by and serves the customers of investor-owned utilities; we do not serve customers of consumer-owned utilities.

We provide information, financial incentives and connections to contractors to help people, businesses and communities save energy and generate renewable power.

In Portland, we serve the customers of Portland General Electric, Pacific Power and NW Natural. This report provides demographic, energy and Energy Trust participation data for this location. Unless otherwise noted, Energy Trust participation data are from 2002 through 2019. The end of this report provides more information about all data sources used.

Fuels and Utilities in Portland Served by Energy Trust

Note that if sites with a particular fuel type account for less than 5% of total sites, that fuel type is removed.



Electric Utilities:
PGE
Pacific Power



Gas Utilities:
NW Natural

Demographics

Variable	Portland	Portland Percent	Oregon	Oregon Percent
Population	719,814	100%	4,081,343	100%
White	558,487	77.6%	3,445,933	84.4%
Black/African American	39,091	5.4%	77,789	1.9%
American Indian or Alaska Native	5,319	0.7%	46,961	1.2%
Asian	57,525	8.0%	174,510	4.3%
Native Hawaiian or Pacific Islander	4,660	0.6%	16,005	0.4%
Other Race	15,887	2.2%	127,084	3.1%
Two or More Races	39,045	5.4%	193,690	4.7%
Hispanic	71,543	9.94%	523,956	12.8%
Households	295,347	100%	1,591,835	100%
Households Linguistically Isolated	11,459	3.88%	41,346	2.60%
Spanish	3,262	1.10%	22,310	1.40%
Other Indo-European	2,105	0.71%	5,072	0.32%
Asian and Pacific Island	4,975	1.68%	11,947	0.75%
Other	1,117	0.38%	2,017	0.13%
Households with Public Assistance	11,210	3.80%	59,351	3.73%
Median Household Income (\$)	73,265	100%	62,193	100%

Note: Hispanic is a separate category from race because it is considered an ethnicity in the Census. Respondents can identify both as any given race and as Hispanic.

Unit Occupancy

Variable	Portland	Oregon
Renter Occupied Units	45.5%	38.1%
Owner Occupied Units	54.5%	61.9%

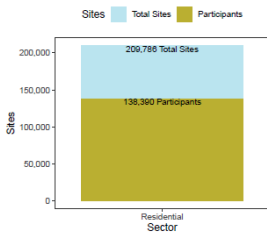
Heating Fuel Types

Variable	Portland	Oregon
Electric Heat	41.8%	50.7%
Natural Gas		
Wood		
Other		

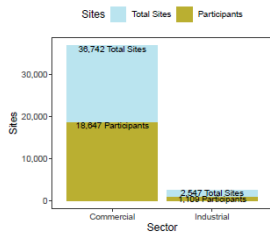
Median Home Value



Residential Participants



Commercial & Industrial Participants

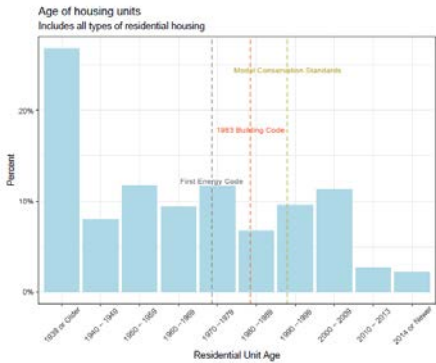


*Industrial sites and participants include agricultural sites and participants

Commercial Participants in Major Markets

Market	Participants	Percent
Multifamily	4,710	25%
Food Service	927	5%
Non-Residential	917	5%
Office	664	4%
Retail	558	3%
Other	10,871	58%

Census Tract Residential Buildings by Age and Median Value



Year Built	Count	Percent
1939 and Older	84,606	28.68%
1940 to 1949	25,080	7.98%
1950 to 1959	36,842	11.75%
1960 to 1969	20,550	6.4%
1970 to 1979	36,896	11.68%
1980 to 1989	21,004	6.71%
1990 to 1999	30,884	9.99%
2000 to 2009	35,411	11.25%
2010 to 2013	8,318	2.59%
2014 and Newer	8,824	2.71%

* Aggregated ACS Data for all tracts overlapping city

storage

Support Eligibility

- A nonprofit or an organization partnered with one
- Project or goal is to support communities of color and low-income Portlanders
- Considering applying for the PCEF “Clean Energy” or “Workforce Development” grant categories

Requesting Support

Support and Tools for Nonprofits Considering the Portland Clean Energy Community Benefits Fund

Is your organization considering applying for PCEF funding? Energy Trust is another resource for you.

About Energy Trust

We are an independent nonprofit that helps Portlanders and Oregonians save energy and generate renewable power. Our programs are for the utility customers of PGE, Pacific Power and NW Natural (Portland's electric and natural gas utilities), as well as Cascade Natural Gas and Avista.

Sign Up For Support

What customers receive:

- Information on why and how to save energy or go solar.
- Technical assistance on what efficient equipment or solar system to select for a home, apartment complex or building
- Cash (called incentives) and other financing options when certain equipment is installed or building construction practices are followed
- A network of contractors and installers they can turn to

It is our responsibility to ensure that all customers can directly benefit from these services, including communities of color and people with low and moderate incomes. We are committed to developing inclusive and diverse partnerships with nonprofits to better serve these communities.

How We Can Support Nonprofits Applying to PCEF

Energy Trust is not an official partner or contractor to the PCEF program. Because our work and mission to deliver clean energy benefits to Portlanders overlaps in ways with the PCEF program, our incentives for utility customers, information and support could be helpful to grant applicants.

If your nonprofit is considering applying for grants from PCEF to bring clean energy programs to communities of color and low-income Portlanders, or you want to know more about energy efficiency and renewable power, we're here to help.

We can provide:

- Information on energy efficiency and solar technologies, benefits and investments by Energy Trust to date
- Information on our incentive amounts and requirements (depending on the type of project, incentives are delivered to the resident or business customer or the installation contractor)
- Potential examples of similar projects, case studies or Energy Trust partnership agreements
- Referrals to peers or other organizations
- Other - let's talk

Contact Us to Get Started

To get started, tell us about your organization, what you want to do and what help you need.

Sign Up

Or call us at 1.888.777.0693.

PCEF

The Portland Clean Energy Community Benefits Fund (PCEF) was created by a ballot measure passed in 2016 by Portland voters to implement climate actions that center on equity and serve traditionally underrepresented populations.

The program launches this year, and grants will be awarded to eligible nonprofits to fund local clean energy projects, innovation and job creation. Visit the [PCEF website](#) for details on what nonprofits can apply for funding, and applications, scoring materials and deadlines.

trust/portland-clean-energy-fund-intake-form-pcef/

ENERGY TRUST HOME CONTACT US ABOUT

EnergyTrust of Oregon EXPLORE PUBLIC MEETINGS PLANS + REPORTS + FINANCIALS LEADERS

Contact Us

Sign Up Form For Nonprofits Applying to PCEF

Step 1 of 3

33%

Tell us about you

Name *

First Last

Organization *

How many people work at your organization?

What services does your organization provide?

Is your organization an Oregon nonprofit? *

☐ Yes

☐ No

Next [Save and Continue Later](#)



Thank You

Energy Trust sign up form for nonprofits:
www.energytrust.org/PCEFsupport

or Energy Trust email
PCEFsupport@energytrust.org

Hannah Cruz
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hannah.cruz@energytrust.org