

## Conservation Advisory Council Agenda

### Virtual meeting

Wednesday, February 17, 2021

1:30 p.m. – 4:00 p.m.

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To join the Zoom meeting, register at this link:

[https://zoom.us/meeting/register/tJ0oduurpzqpGdG\\_Ov1PCbKRpOLw53MAbTJ4](https://zoom.us/meeting/register/tJ0oduurpzqpGdG_Ov1PCbKRpOLw53MAbTJ4)

After registering, you will receive a confirmation email containing information about joining the meeting.

#### **1:30 Welcome and announcements**

- Introductions
- Approve November meeting notes [in packet]
- Production Efficiency Standard Track request for proposals timing change

#### **1:45 Report on findings from individual member outreach** *(inform with time for feedback)*

In January, CAC Facilitator Hannah Cruz met with CAC members for feedback on member satisfaction levels, and input on facilitation approaches and agenda content. Hannah will share out common areas of feedback and seek any remaining feedback or reflections.

Presenter: Hannah Cruz (15 min)

#### **2:00 Organizational update: preliminary 2020 results, 2021 goals** *(inform)*

Director of Programs Peter West will share preliminary annual results from 2020, including progress to achieving energy-saving goals. Hannah will provide a reminder on the 2021 Organizational Goals guiding program strategies and activities for this year. This information is considered relevant context for everyone as we start the year.

Presenters: Peter West and Hannah Cruz (20 min)

#### **2:20 Break (10 min)**

#### **2:30 Business lighting changes and incentive management** *(inform with time for input)*

High demand for business lighting incentives during Q4 2020 have impacted availability of incentives for 2021 and necessitated changes to the 2021 business lighting initiative budget. Staff managing this initiative will provide context that led to these changes and in-progress adjustments to manage the budget.

Presenter: Jessica Kramer (30 min)

#### **3:00 New Buildings cost-effectiveness workshops** *(inform with time for input)*

Workshops continued through 2020 to determine a pathway forward for the New Buildings program as the state moves to higher, whole building efficiency levels in the energy code. Staff briefed the council on these discussions in summer 2020 and at this meeting will provide an informational update on the latest actions taken, including conducting building proxy analyses.

Presenter: Jay Olson (20 min)

**3:20 2021 state legislative update** (*inform with time for input*)

Staff will provide information about energy-related bills that are being monitored during Oregon's 2021 state legislative session, including a bill modifying the public purpose charge ([HB 3141](#)). CAC members are invited to share information about any of their priorities for the session.

Presenter: Hannah Cruz (20 min)

**3:40 Member share-out and survey on meeting**

This is time for CAC members to share what their organizations are focused on this quarter or year, particularly actions to support customers during the COVID-19 pandemic. Staff is welcoming of any suggestions, too, on how our programs could be more effective during this time.

A short survey will be shared with CAC members to gauge interest levels on the topics discussed today.

**3:55 Public comment**

**4:00 Adjourn**

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

**Next meeting:** Our next meeting is April 14, 2021.

## Conservation Advisory Council Meeting Notes

November 18, 2020

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### Attending from the council:

Jeff Bissonnette, NW Energy Coalition  
Warren Cook, Oregon Department of Energy  
Kari Greer, Pacific Power  
Tim Hendricks, representing Building Owners and Managers Association  
Rick Hodges, NW Natural  
Tina Jayaweera, NW Power and Conversation Council  
Anna Kim, Oregon Public Utility Commission  
Jess Kincaid, Bonneville Power Administration (for Dave Moody)  
Jason Klotz, Portland General Electric  
Keith Kueny, Community Action Partnership of Oregon  
Lisa McGarity, Avista  
Mark Rehley, Northwest Energy Efficiency Alliance (for Julia Harper)

### Attending from Energy Trust:

Hannah Cruz	Amanda Sales
Peter West	Jay Ward
Marshall Johnson	Allison Burns
Jeni Hall	Tyrone Henry
Elizabeth Fox	Amanda Zuniga
Debbie Menashe	Quinn Cherf
Julianne Thacher	Scott Leonard
Mana Haeri	Sue Fletcher
Andy Griguhn	Spencer Moersfelder
Kate Wellington	Peter Schaffer
Ben Cartwright	Karen Chase
Alex Novie	Melanie Bissonnette
Thad Roth	Oliver Kesting
Amber Cole	Jay Olson
Amanda Davidowitz	Jackie Goss
Matt Getchell	Amanda Potter
Ryan Crews	Naomi Cole
Steve Lacey	Eric Van Orden
Derek Olson	Karen Chase
Shelly Carlton	Mark Wyman
Fred Gordon	Adam Bartini
Betsy Kauffman	

### Others attending:

Elee Jen, Energy Trust board	Ryan Bottesini
Alan Meyer, Energy Trust board	Don Jones, Pacific Power
Lindsey Hardy, Energy Trust board	Samuel Patrick, Citizens Utility Board
Silvia Tanner, Multnomah County Office of Sustainability	Charity Spires, Pacific Power
Heather Moline, NW Energy Coalition	Aaron Frechette, Cascade Energy
Jake Wise, PGE	Tamara Falls, PGE
Cristian Salgado, PGE	Joe Marcotte, TRC
	Misti Nelmes, CLEAResult

Dave Backen, Backen Consulting  
Whitney Miller, CLEAResult  
Jenny Sorich, CLEAResult  
Amy Burke, Bonneville Power  
Administration  
Patrick Murphy, CLEAResult  
Cindy Strecker, CLEAResult  
Tina Brooks, Pacific Power  
John Molnar, Roger Machinery Company

Dan Elliott, Oregon Housing and  
Community Services  
Adam Shick, CLEAResult  
Kate Hawley, TRC  
Carrie Ng, Small Business Utility Advocates  
Cathy Chappell, TRC  
Shelley Beaulieu, TRC  
Kirsten Svaren, TRC  
Scott Scheuneman, RHT Energy

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## 1. Welcome

Hannah Cruz, senior communications manager, convened the meeting at 1:31 p.m. over Zoom. The agenda, notes and presentation materials are available at [www.energytrust.org/about/public-meetings/conservation-advisory-council-meetings](http://www.energytrust.org/about/public-meetings/conservation-advisory-council-meetings).

Hannah Cruz announced Energy Trust's Peter West will retire in early 2021 and thanked him for his leadership and dedication. Peter West credited the cooperative work of many groups and stakeholders in Oregon for the progress made in energy efficiency. A national recruiting effort will start in a few weeks for a new director of energy programs. Council members will be sent a survey in the next few weeks and will be asked for input on the position description.

Hannah Cruz introduced Jeff Bissonnette from NW Energy Coalition as a new member of the council and announced Keith Kueny would be leaving the council after taking a job out of state.

## 2. Residential Incentives for Low-Income Utility Customers

### *Topic summary*

Marshall Johnson, program manager in the residential team, gave a presentation on how Energy Trust serves customers with low incomes and works with other groups that do so, including Oregon Housing and Community Services, community action agencies and programs funded by utility ratepayers.

Marshall Johnson gave brief descriptions of Energy Trust's initiatives to serve low- to moderate-income residential customers, which include low- and no-cost equipment offers; Savings Within Reach enhanced incentives and financing; single-family rental incentives; fixed price promotions; free manufactured home services; and a manufactured home replacement pilot. Energy Trust also co-funds projects with community organizations to reach customers with low incomes. Co-funding must align with Energy Trust's cost-effectiveness guidelines. An example of this is a pilot with the community action agency in Washington County to fund weatherization upgrades for low-income residents. This led to a new offer, Community Partner Funding, in which community-based organizations can access higher incentives to help their customers install energy-saving improvements.

### *Discussion*

Council members said they were happy to see co-funding efforts paying off (Keith Keuny) and congratulated Energy Trust for achieving this work within the framework for its programs (Warren Cook).

Heather Moline of NW Energy Coalition said it's important for Energy Trust to make this information easy to understand for groups outside the energy industry. Members asked how Energy Trust helps groups that aren't in the industry become more familiar with energy efficiency (Lisa McGarity). Marshall Johnson gave examples of how Energy Trust works with

African American Alliance For Homeownership to train and mentor a home auditor to work with its existing client base, and collaborates with Verde on marketing materials for a ductless heat pump offer in Northeast Portland.

Jake Wise from PGE asked for details on Community Partner Funding attribution. Marshall Johnson explained Energy Trust and Oregon Housing and Community Services coordinate to ensure savings are not double counted.

*Next steps*

None.

The council took a five-minute break.

### **3. 2021 Budget Update**

*Topic summary*

Peter West presented an update on Energy Trust's 2021 budget and action plan. The draft budget was presented to the council and the public at an October workshop. Among the feedback and written public comments received, there was support for thoughtful and proactive community engagement; outreach and inclusive co-creation; responding to the COVID-19 pandemic and wildfires in ways that support small businesses, help communities rebuild and leverage other funding; residential and renewable energy program action plans; coordination with utilities; diversity, equity and inclusion activities; and cost management and transparency. The OPUC also gave recommendations on the draft budget, including that Energy Trust focus on residential offers with peak impacts; develop peak modeling capability; include cost-effectiveness exception costs in future budgets; implement supplier diversity tracking; plan to align staffing with outreach goals; and keep administrative costs in 2022 below 8% of revenues.

Based on this information and other factors, Energy Trust made changes to its draft budget, including decreasing lighting incentives to manage demand driven by spring 2020 bonuses. The bonuses were part of Energy Trust's response to the COVID-19 pandemic. The bonuses have ended, and Energy Trust has paused accepting new applications for lighting incentives until mid-January. Peter West then presented cost and savings changes made to the draft budget.

*Discussion*

None.

*Next steps*

The final proposed budget will be posted online December 3 and the board will consider it for adoption December 11.

### **4. Organizational Response to Rebuilding Efforts Due to Labor Day Wildfires**

*Topic summary*

Sue Fletcher and Karen Chase from Energy Trust's outreach team gave an update on Energy Trust's response to wildfires in Oregon that started this summer. The fires and loss of homes and businesses were unimaginable; the displacement and loss are traumatizing and disproportionately affect vulnerable people. Customers, trade allies, community partners and even Energy Trust staff were directly affected. Household hazardous waste clean-up is largely done, but ash and debris clean-up could take up to 18 months. Most rebuilding will likely happen in 2022 and beyond.

While not an expert or leader on this issue, Energy Trust can be a technical and financial resource for each community rebuilding and retrofitting homes and businesses. So far, impacted communities are focused on emergency response and housing, but some have reached out to

Energy Trust, including about its manufactured home replacement pilot. Scott Leonard, who manages the residential new construction program, described Energy Trust's immediate actions, including addressing marketing and customer service issues and forming an internal project team. Energy Trust is participating in local and state forums, conducting outreach to impacted communities and is one of several organizations helping to fund a housing recovery specialist position at the Housing Authority of Jackson County.

Mark Wyman, who manages residential pilots and new products, described potential offers and approaches, including replacing manufactured homes under Energy Trust's current pilot; modifying program designs to accommodate more owners/buildings and more construction; aligning baselines with state code for new construction rebuilding; supporting resiliency measures like solar and energy storage; targeting incentives; and supporting community-wide planning efforts. These fires give rationale for Energy Trust to provide a custom approach to match the challenges people are facing and may again in the future.

#### *Discussion*

Carrie Ng of Small Business Utility Advocates asked about assistance programs for small businesses affected by the fires. Karen Chase said each community is approaching commercial sector support differently.

#### *Next steps*

None.

### **5. 2021 Industrial Sector Standard Track RFP and Technical Review RFQ**

#### *Topic summary*

Amanda Potter and Adam Bartini from the industrial sector previewed a request for proposals (RFP) for the standard track and request for qualifications (RFQ) for technical review that will be issued in 2021. They also gave background on how the Production Efficiency program is run, what of customers it serves and the incentive offers provided.

The standard track delivers electric and gas prescriptive and calculated energy efficiency projects. Goals for the RFP include achieving cost-effective energy savings targets; broadening the Trade Ally Network; equitably serving customers across Energy Trust territory; and developing new efficiency measures. Bidders should have experience in industrial energy efficiency, implementation, trade ally management and measure development. Scoring will prioritize pricing and energy savings, followed by diversity, equity and inclusion qualifications, implementation strategy and contracting plan. These are similar criteria to what was used to score this year's Existing Buildings and business lighting RFP.

For the technical review RFQ, Energy Trust seeks an energy-efficiency engineering contractor to perform technical reviews of studies, incentive offers and project verifications. Technical reviews ensure program requirements are met and verifies energy savings. Bidders should have experience in industrial energy efficiency, project management and with some systems or technologies used.

Draft plans were presented, and details could change.

#### *Discussion*

Jake Wise from PGE asked Energy Trust is doing to help support diverse firms. Amanda Potter said there will be new outreach efforts, including a webinar in January for potential bidders.

Members asked what lessons from the recent Existing Buildings and business lighting RFP are being applied here (Anna Kim). Amanda Potter noted several things: understanding the market

needs time to develop teams; requiring a Certification Office for Business Inclusion and Diversity (COBID) application instead of certification; having a member of the Diversity Advisory Council and Energy Trust's diversity, equity and inclusion lead serve on the scoring committee; and increasing the minimum DEI subcontracting percentage.

Hannah Cruz asked why bidders for the technical review RFQ requirement must have experience with some but not all systems or technologies. Adam Bartini said that's because Energy Trust deals with so many different systems. Members suggested requiring experience with certain systems (Lisa McGarity, Anna Kim). Staff will consider this suggestion.

*Next steps*

None.

## **6. Residential Non-energy Benefits Research**

*Topic summary*

Mark Wyman and Jeni Hall presented research on non-energy benefits of energy efficiency and renewable energy projects at residential sites, in an effort to understand other quantifiable benefits from distributed energy resource technologies for new homes beyond energy savings and generation. The research found non-energy benefits included better health and fewer missed days at work; it also showed benefits related to energy resilience and reduced energy burden.

*Discussion*

Don Jones at Pacific Power noted similar research happening in Washington, and that in the future, explicit annual reporting on non-energy benefits might be helpful. Energy Trust already tracks quantifiable non-energy benefits.

Members asked if the health benefits, which were reported for low-income utility customers, may translate to other types of customers and if electric vehicles come with timers for chargers (Lisa McGarity). The health benefits likely do apply to other customer groups but that existing research is limited. Electric vehicles can be programmed to start and stop charging at certain times.

*Next steps*

Energy Trust will coordinate with the OPUC on non-energy benefits and incorporate values into energy-efficiency measure approval documents as they come up for renewal.

## **7. Adjournment**

The meeting adjourned at 4:52 p.m. The next meeting will be in February 2021.





# CAC Member Feedback

Staff report back  
February 17, 2021



## Common areas of feedback

- Appreciate staff
- Want an opportunity for meaningful input
- Content suggestions
- Connection among CAC members
- Connection to DAC
- CAC's role vis-à-vis the board and staff
- Grab bag

**Do these areas of feedback resonate with you?**

**Additional input?**

**Areas of importance to you that I didn't cover?**



# Thank You

Hannah Cruz

Sr. Communications Manager

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# 2020 Preliminary Annual Results

Conservation Advisory Committee

February 17, 2021



## 2020 preliminary annual results

Saved 43.1 aMW—**95%** of electric savings goal

Saved 7.2 MMTh—**110%** of gas savings goal

Generated 4.17 aMW—**127%** of renewable goal

Met goals for Pacific Power, NW Natural and Avista, came close to goal for PGE





# Preliminary efficiency results by utility

	Savings	Goal	% Goal Achieved	IRP Target	% IRP Achieved
PGE	25.6 aMW	27.4 aMW	93%	30.5 aMW	84%
Pacific Power	17.5 aMW	18.0 aMW	97%	19.2 aMW	91%
NW Natural	6,357,068 therms	5,591,966 therms	114%	6,018,697 therms	106%
Cascade Natural Gas	426,714 therms	547,244 therms	78%	621,804 therms	69%
Avista	414,395 therms	387,588 therms	107%	313,420 therms	132%

*Figures include NEEA*

# Preliminary efficiency results by sector

	Electric Savings	% Achieved	Gas Savings	% Achieved
Commercial sector	17.7 aMW	88%	2,030,165 therms	81%
Industrial and agricultural sector	16.8 aMW	94%	2,422,467 therms	160%
Residential sector	8.6 aMW	116%	2,745,545 therms	110%
<b>Total</b>	<b>43.1 aMW</b>	<b>95%</b>	<b>7,198,178 therms</b>	<b>110%</b>

*Figures include NEEA*

# Preliminary generation results by utility

	Generation	Goal	% Achieved
PGE	2.55 aMW	2.25 aMW	114%
Pacific Power	1.61 aMW	1.02 aMW	158%
<b>Total</b>	<b>4.17 aMW</b>	<b>3.27aMW</b>	<b>127%</b>



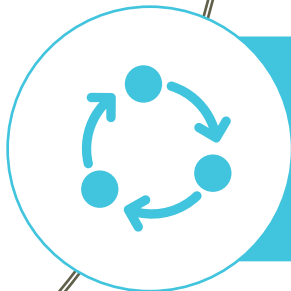
# 2021 Goals



Meet savings and generation targets with offers and services designed to support customers during the economic and social recovery related to the COVID-19 pandemic.



Invest in relationships and collaborations with other entities to meet common needs and future objectives.



Enhance operating processes and internal culture to efficiently respond to change.





# Thank You

Final OPUC Annual Report  
available **April 15, 2021**, at  
[www.energytrust.org/reports](http://www.energytrust.org/reports)

# Background

# 2021 Goals



## **Goal 1: Meet savings and generation targets with offers and services designed to support customers during the economic and social recovery related to the COVID-19 pandemic.**

We will meet 2021 targets of 45.0 aMW and 6.5 million therms of savings and 3.54 aMW of generation while creating opportunities for future savings and generation with a particular focus on:

- Continuing to adapt program design to respond to market changes resulting from the recovery related to the COVID-19 pandemic.
- Meeting the OPUC metrics for cost-effectiveness, diversity, customer service and innovation.
- Targeting savings and generation within specific communities when and where they have the greatest value to the utility grid.



# 2021 Goals



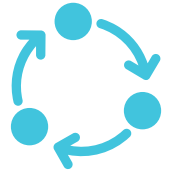
## **Goal 2: Invest in relationships and collaborations with other entities to meet common needs and future objectives.**

We will focus resources on working with utilities, agencies, communities, and business- and community-based organizations on joint initiatives that help each entity accomplish its purpose with a particular focus on:

- Collaborating with workforce organizations to enhance the diversity of our Trade Ally Network.
- Resolving funding uncertainties to enable continued delivery of clean energy programs and benefits and identifying other funding sources for complementary initiatives.
- Connecting our programs to community planning, housing affordability, economic recovery, resiliency and greenhouse gas reduction efforts.
- Collaborating with the Portland Clean Energy Fund and prospective grantees.
- Working with the OPUC and state agencies to support implementation of the state's energy- and climate-related policies.
- Working with mid-stream market actors to retain our ability to deliver affordable, clean energy at volume.



# 2021 Goals

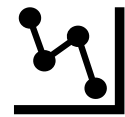


## **Goal 3: Enhance operating processes and internal culture to efficiently respond to change.**

We will enhance operating efficiency through process improvements and continued investment in innovation that results in a flexible workforce and work environment with a particular focus on:

- Enhancing employee development and growth with an emphasis on intercultural awareness and inclusion.
- Improving the efficiency of our budget process.
- Continuing policy development and technology adoption to support remote work arrangements and social distancing for staff.
- Learning from experience and adapting our organizational structure to support progress in the focus areas identified in the strategic plan.
- Furthering our efforts to foster and promote innovation.
- Accelerating our use of digital platforms and increased process automation to enhance our customer and contractor experience through increased efficiency.

# 2021 Assumptions



ECONOMIC CONDITIONS



MARKETS & CUSTOMERS



TECHNOLOGY



POLICY



PROGRAM CONSIDERATIONS





# Business Lighting Pipeline and Program Changes

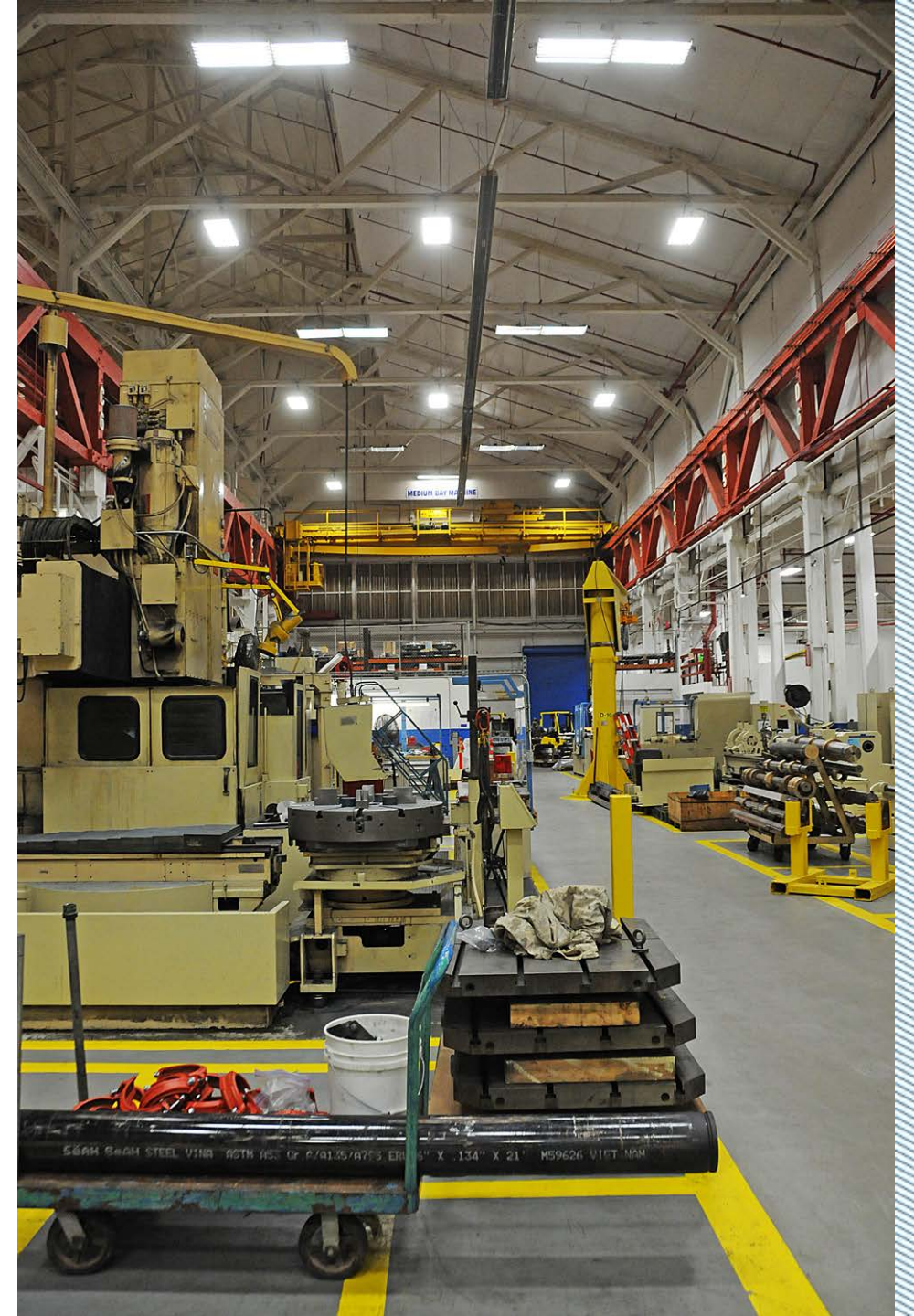
Conservation Advisory Council

February 17, 2021



# Agenda

- 2020 in review
- 2021 pipeline update
- Program changes
- Activity updates





A photograph of a restaurant interior. In the foreground, a menu board is visible with sections for 'PIZZA', 'PASTA', and 'ENTREES'. The ceiling features several recessed circular lights. The image is positioned on the left side of the slide.

# 2020 in Review: Business Lighting

- COVID-19 slowed Oregon business activity
  - And energy efficiency projects
- Bonuses launched in spring to support businesses
- Project activity increased quickly in fall
- Several steps taken to manage budget
  - Ended bonuses
  - Paused accepting applications for new projects

# Strong Business Lighting Pipeline for 2021

- Strong 2021 program pipelines due to 2020 bonus projects completing in 2021
- Less budget available for *new projects* in 2021

	2021 Incentive Budget	% Committed as of 2/21
PGE	\$12 million	55%
Pacific Power	\$9.6 million	77%
TOTAL	\$21.6 million	65%

# Completed Changes

- Closed Trade Ally Network (in-network)
- New custom and prescriptive incentives
- Program caps
  - Project and participant caps: \$6,000
  - Trade ally annual caps: PGE \$250,000; Pacific Power \$75,000
  - Active project caps: PGE 10; Pacific Power 5
- Application and completion timeline changes
  - Application signed within 30 days from 120L Participation Agreement date
  - Completion timeline within 120 days from 120L Participation Agreement date



# Activity Update

- December 2020 and January 2021
  - Trade ally communications
  - Program re-launch webinar
- February 2021
  - Trade ally sign up for closed network
  - Program launch (February 10)
  - Bonus projects due (February 28)







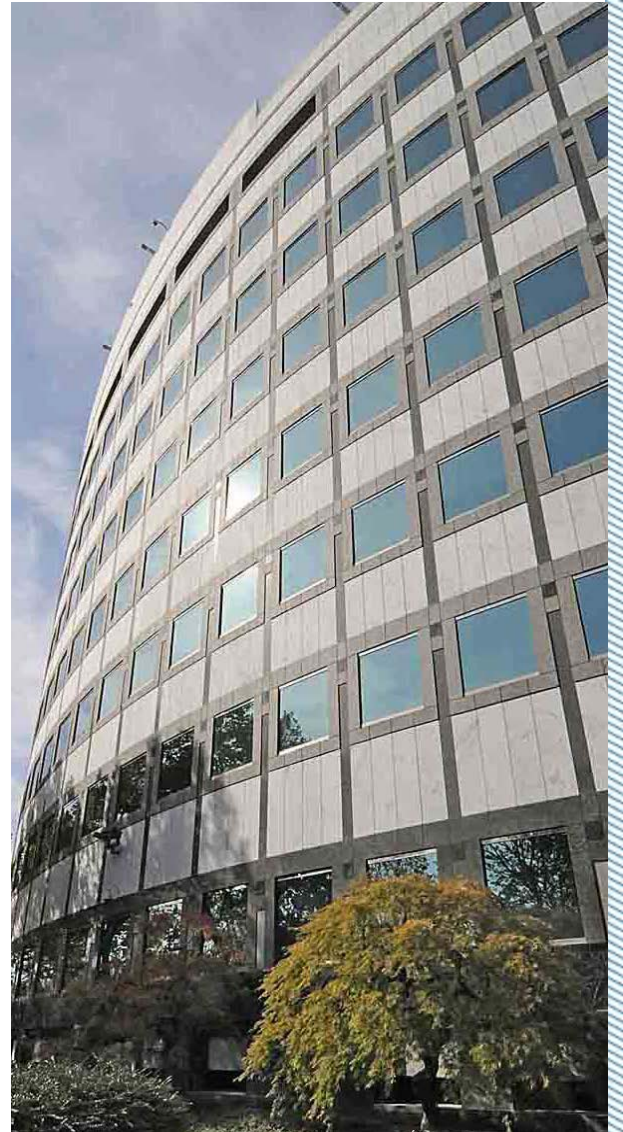
# Thank You

Jessica Kramer

Sr. Program Manager – Business  
Lighting

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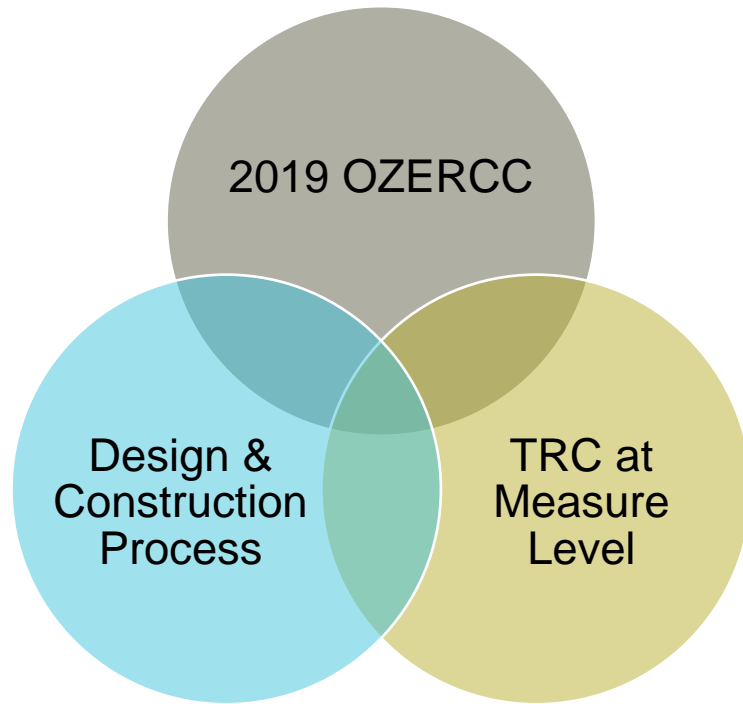




New Buildings Program and Code Alignment  
Conservation Advisory Council Meeting  
February 17, 2021

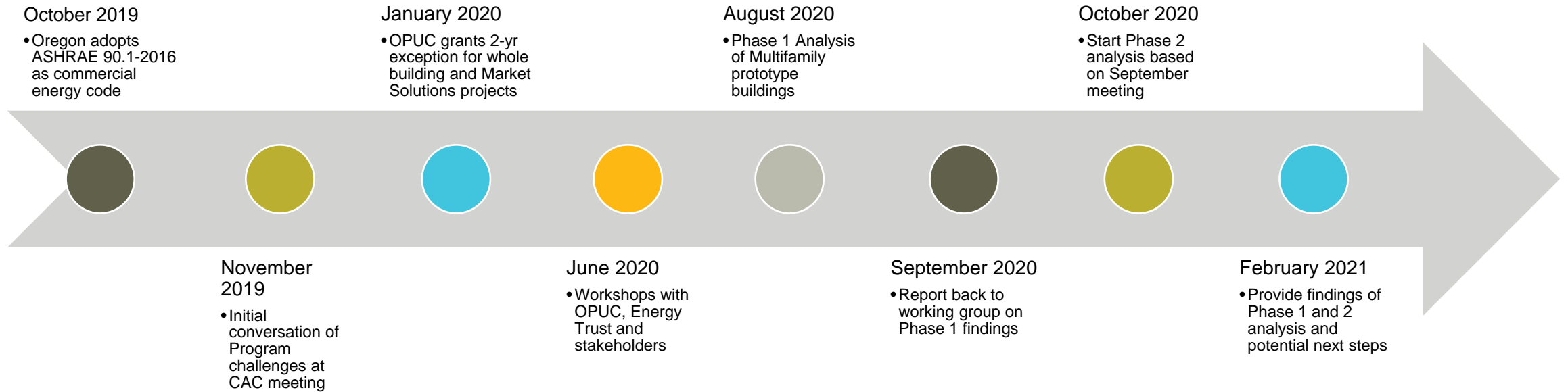


# Why are we here?



- Oregon moved to an ASHRAE-based code in 2019
  - New Buildings is a code-based program
  - New code requires offering updates + opportunity to improve program design
- New Buildings offerings support energy efficiency throughout the design and construction process
  - Competing priorities in the decision-making process
  - Timing of incentive reservation versus decision-making
- Projects must meet Total Resource Cost test at the measure level
  - Challenges of identifying measure level costs for new construction
  - Appendix G methodology does not provide simple pathway to measure level savings

# Timeline of Events





# OPUC Cost-Effectiveness Exception Granted January 2020



OPUC granted Energy Trust a two-year (2020 - 2021) exception to the Total Resource Cost test (TRC), and the requirement for measure level analysis for custom projects (including Whole Building and Market Solutions Offering)

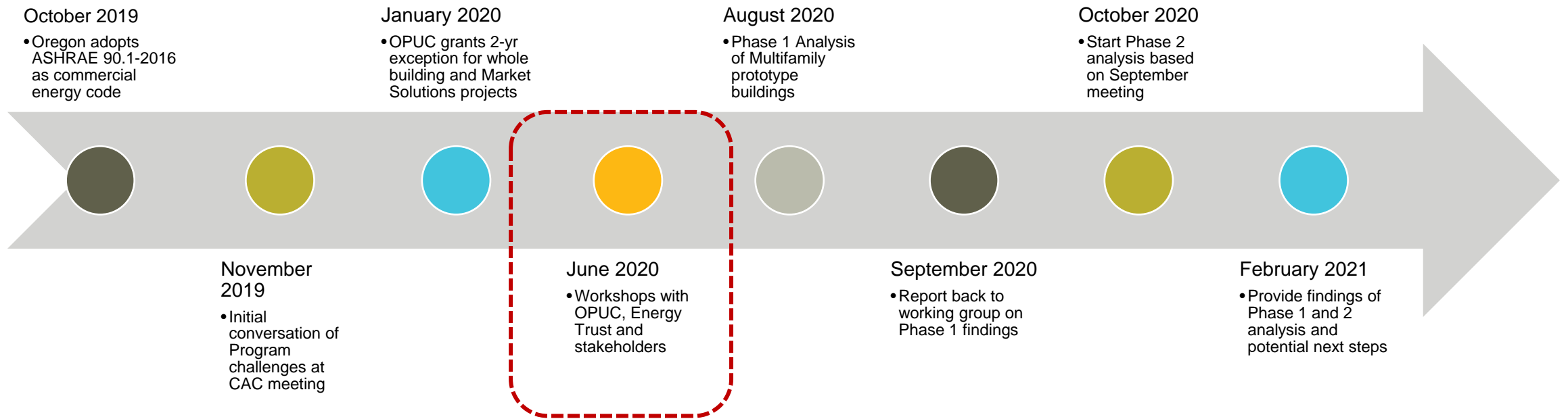


These projects comprise approximately half of program savings; prescriptive projects, the other half of program savings, are unaffected by the exception



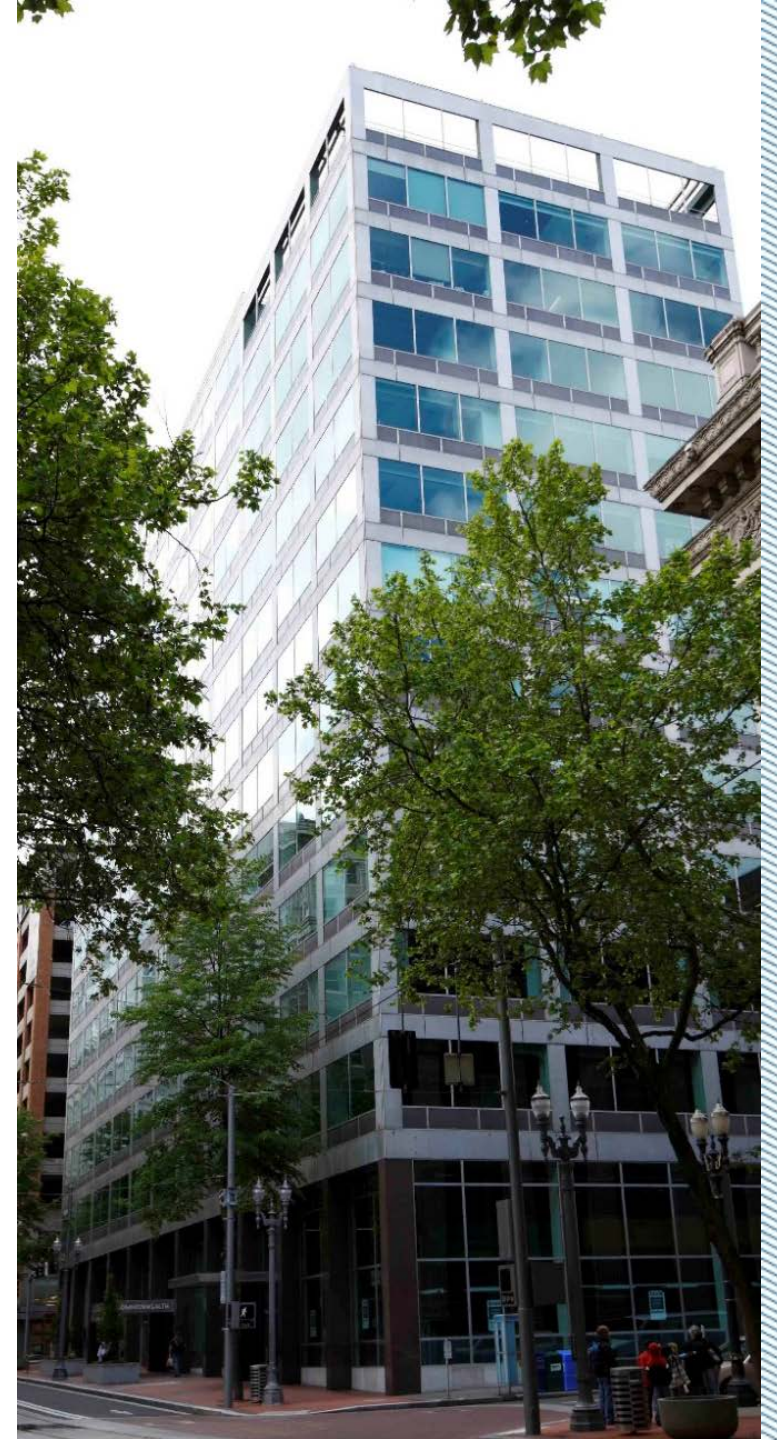
Energy Trust, with key partners, will determine whether there are “reasonable” strategies for the Program to meet current regulations or if a long-term change is necessary to keep the Program relevant to the market and in alignment with current code.

# Timeline of Events



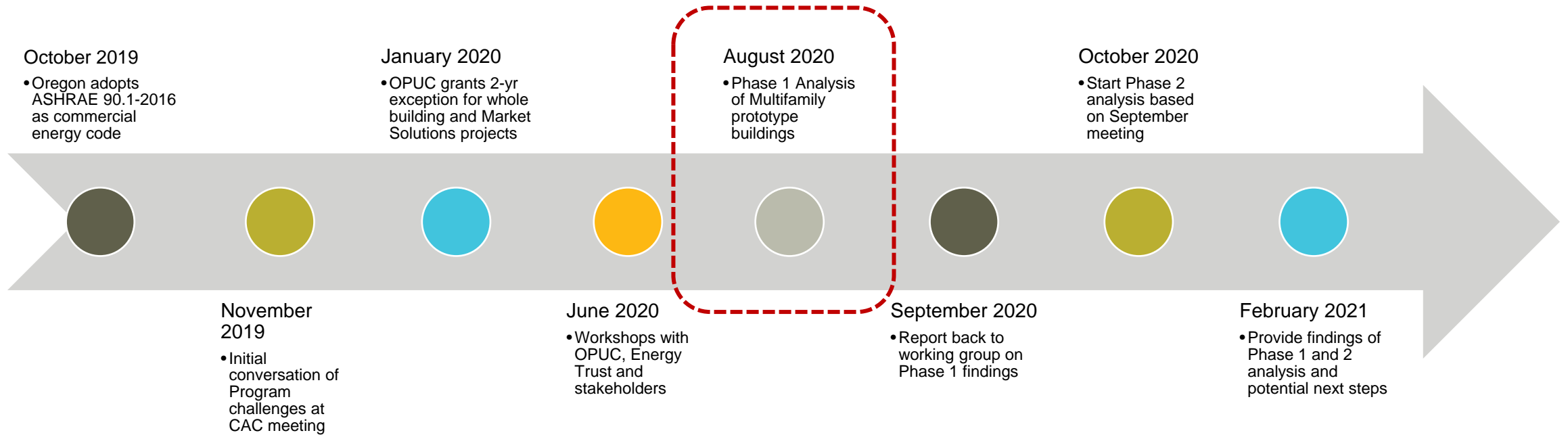
# Workshop Agreements

- We want to find a **reasonable way to meet current OPUC measure-level cost effectiveness regulations** (i.e. our conversation does not start with the assumption that regulations must change)
- If we can't find a reasonable approach, within current measure-level regulations, we will pursue a **solution that best meets code, market, savings and regulatory needs that ensure sound ratepayer investments**
- Any program revisions that respond to current code, should **create flexibility** that enables responsiveness to future code changes as well





# Timeline of Events

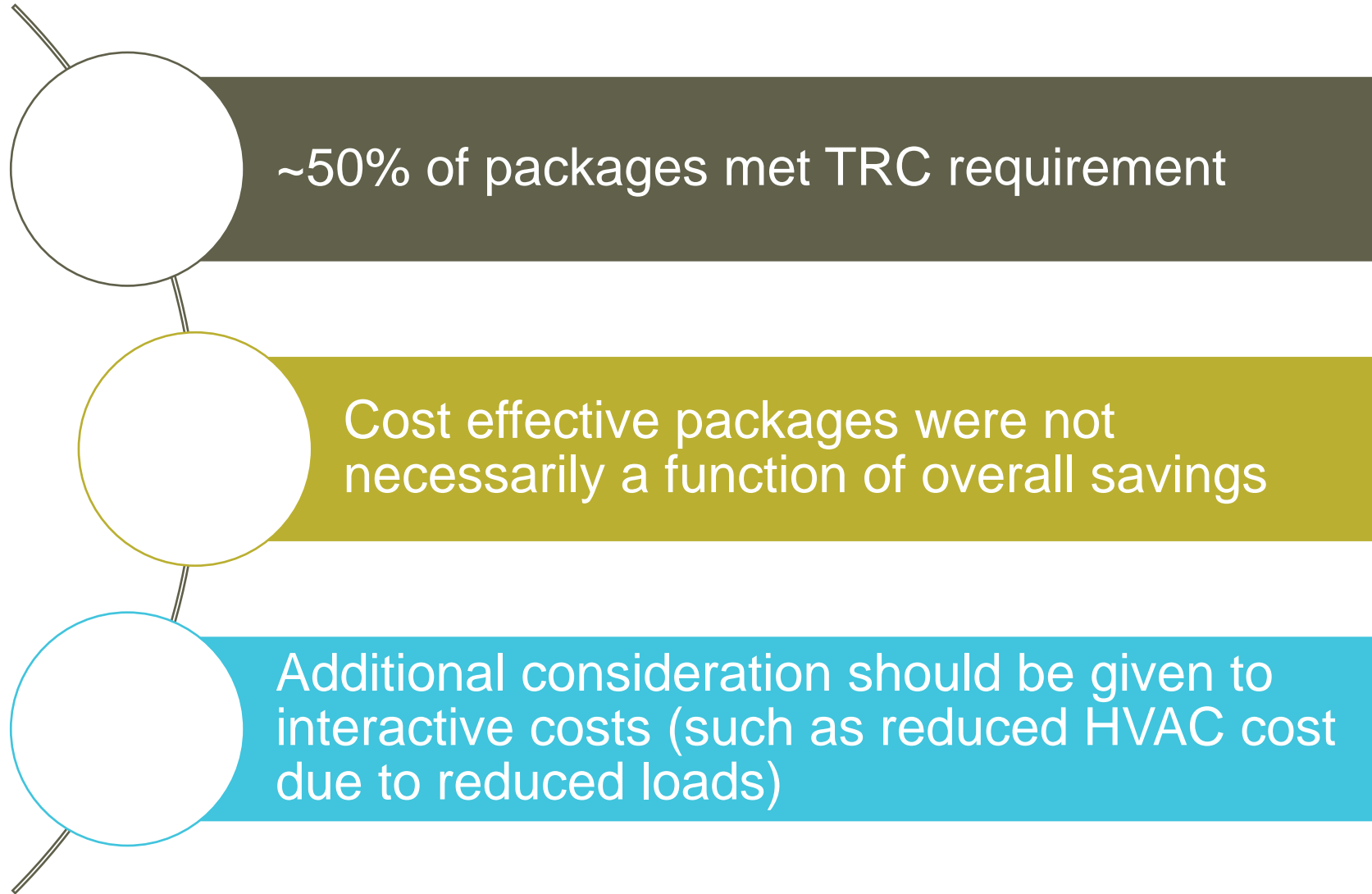


# The Proxy Approach - Details

Demonstrate cost effectiveness through total resource cost test (TRC) for various levels of above code performance at the building level:

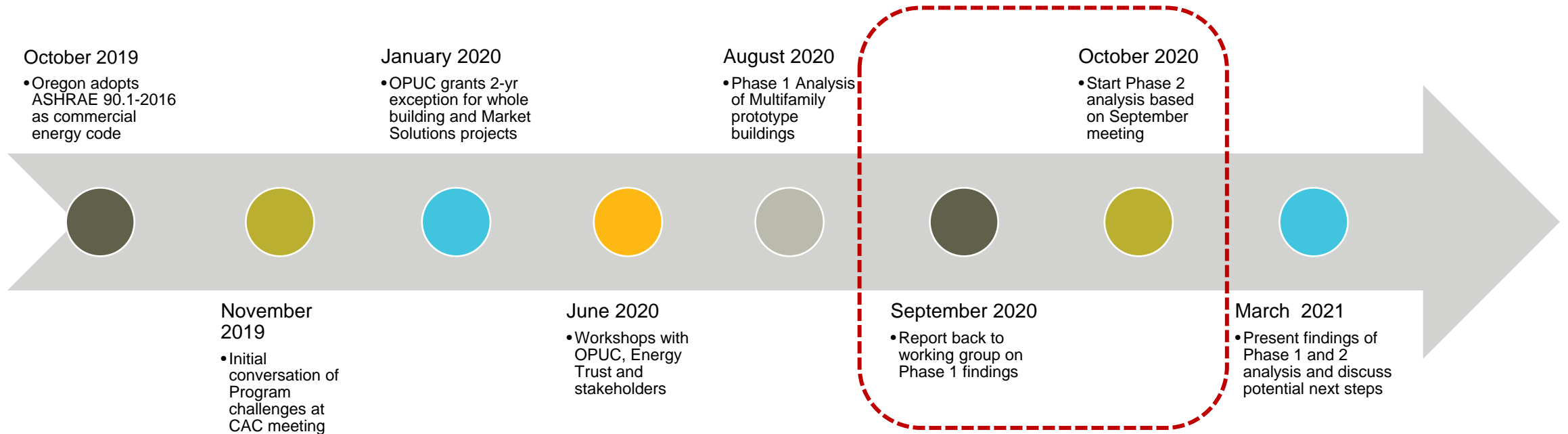
- Complete for multiple building types
- Base on U.S. Department of Energy prototype energy models
- Analyze a finite set of building characteristics
- Obtain incremental costs from third-party cost consultant
- Use Energy Trust cost-effectiveness calculator to determine TRC benefit/cost ratio

# Phase 1 – Proxy Approach: What We Learned

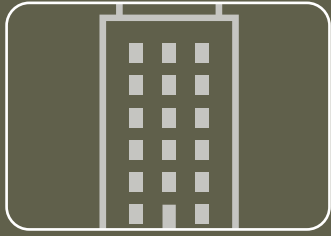




# Timeline of Events



# What's Different from Phase 1?



Additional building types: primary and secondary school, and small-, medium- and large-office



Account for interactive effects in both savings and costs



Develop packages with savings approaching levels required by Path to Net Zero

# Proxy Approach Objectives

- Is there a cost-effective performance threshold that is nearly the same across all building types?
- Do results apply to mixed use buildings and building types not analyzed?
- Should non-energy benefits or other reasons for installing above-code features be considered?



% savings beyond code

TRC  $\geq$  1

< 28%

< ?%

< ?%

TRC < 1

$\geq$  28%

$\geq$  ?%

$\geq$  ?%



# Why Office, MF and K-12?

- These sectors are a substantial representation of the custom project pipeline (Whole Building & Market Solutions)
- Anticipate results will identify trends that are applicable to other building types
- Custom projects comprise approximately half of program savings; prescriptive projects, the other half of program savings, are unaffected by the exception



## Phase 2 Progress

1. Update prototype models to allow running multiple packages against the 90.1 Appendix G modeling ruleset - **completed**
2. Develop matrix of building attributes to be included in costing exercise - **completed**
3. Complete energy modeling - **completed**
4. Utilize cost consultant to provide cost estimates of baseline building plus six different above code packages – **in progress**
5. Determine TRC for multiple packages across all five building types – **in progress**
6. Determine if proxy approach sufficiently demonstrates whole building cost effectiveness



# Thank You

Jay Olson  
Sr. Program Manager – New Buildings  
[jay.olson@energytrust.org](mailto:jay.olson@energytrust.org)

Cindy Strecker  
Senior Engineering Manager  
[cindy.strecker@clearresult.com](mailto:cindy.strecker@clearresult.com)



Background



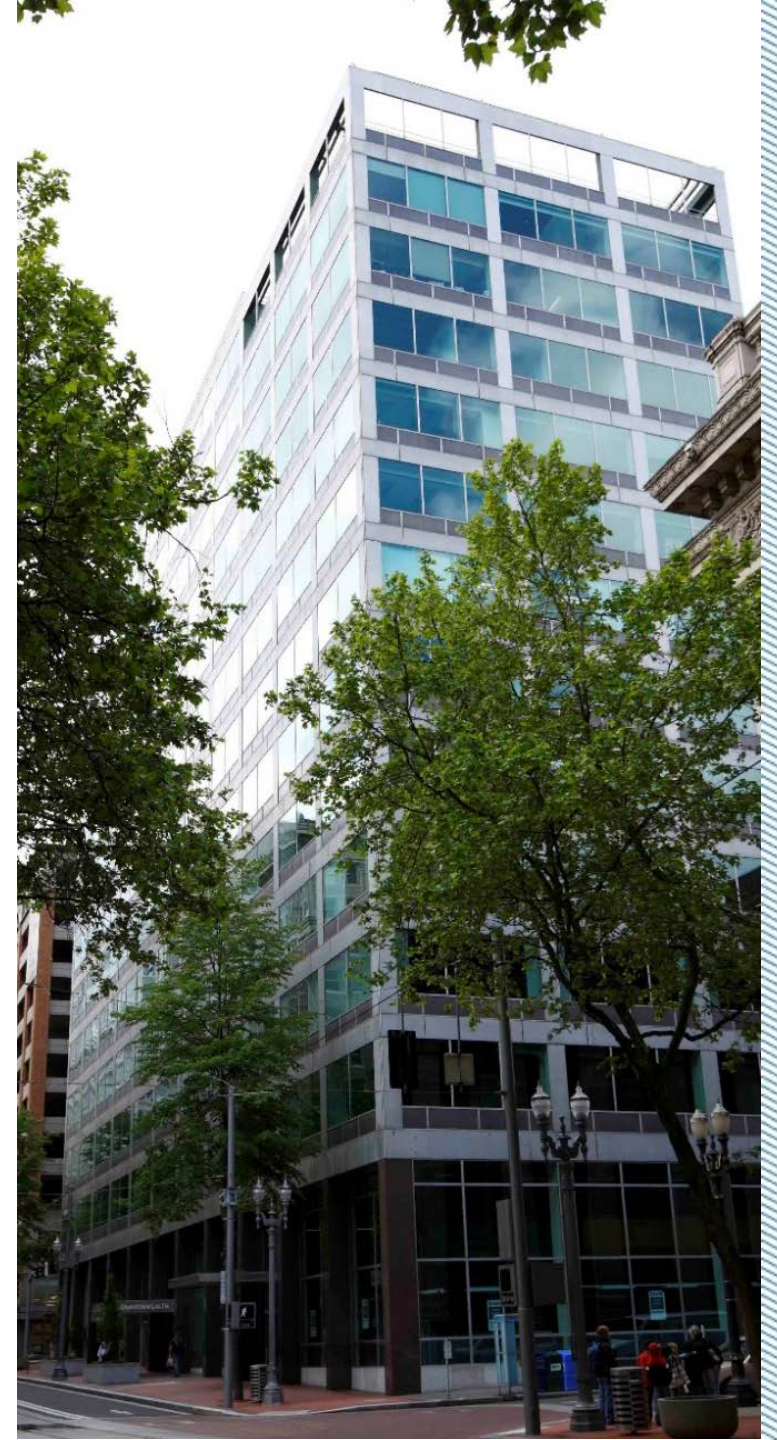
## Background and Challenge

- In 2019 the State made changes to the new commercial construction code
- It is not clear how to align the program with both the market and OPUC approaches to cost effectiveness and measure analysis
- In January 2020, the OPUC granted an exception to the total resource cost test and measure level analysis



# Why Are We Here?

- New Buildings is a code-based program
  - Savings calculated against a code baseline for regulated loads
- Oregon changed to an ASHRAE-based code in 2019
  - Requires program offering updates
  - Provides opportunity to improve program design
    1. Increase building performance across all project types and thus 'increase' program savings (after accounting for the reduction in savings due to code)
    2. Decrease overall program costs





# New Buildings Program Under the 2019 Oregon Zero Energy Ready Code (OZERC)

ASHRAE 90.1 – 2016  
Appendix G

- Stable baseline with Performance Cost Index that varies with each code version
- Appendix G modeling provides design teams with flexibility in reaching performance goals
- Could result in lower program costs as energy modeling costs decrease for design teams
- Does create a new challenge: how to show measure-level cost effectiveness

# Timeline of Work

Key Steps	2020												2021	
	JANUARY	FEBRUARY	MARCH	APRIL	MAY	JUNE	JULY	AUGUST	SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER	JANUARY	FEBRUARY
OPUC Exception (expires Dec 31, 2021)														
Program Launched Whole Building Offering														
Develop Code Alignment Stakeholder Working Group														
Workshop's 1-3 (6/1, 6/12, 6/26)														
Proxy Approach Analysis														
Develop & Launch Market Solutions Offering (MSO) for Multifamily														
OPUC/Working Group Progress Report														
Proxy+ Analysis														
Reconvene on findings of proxy approach														

# Phase 1 Work Plan “Proxy Approach”



# Phase 1 – Proxy Approach: What We've Learned

Can we reasonably meet regulations (TRC) in a way that also meets program and market needs?

- ~50% of packages meet TRC requirement
- Some savings may not be accounted for with prototype buildings but would also be difficult to cost
- Did not include an interactive cost analysis (i.e. reduced HVAC cost due to reduced loads)

What level of analysis is required to approximate a measure-level TRC with prototype buildings?

- What is an acceptable cost for completing the analysis?
- How often the costing exercise would need to be updated?
- Should more options be considered, both at the building attribute level and at the total building savings level?

# Phase 1 – Proxy Approach: Is it Good Enough?



What is an acceptable cost for ongoing updates?



How frequently do updates of costs and data need to occur?



How many building types are needed to prove at the Program level?



What is the appropriate level of precision at building and measure level? How many options should be considered?

# Phase 2 Work Plan

## “Proxy+”



## Anticipated Timeline

Key Steps	2020			2021											
	OCTOBER	NOVEMBER	DECEMBER	JANUARY	FEBRUARY	MARCH	APRIL	MAY	JUNE	JULY	AUGUST	SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER
Proxy+ Analysis															
Reconvene on findings of proxy approach															
Anticipated Code Change (ASHRAE 90.1-2019)															
Program design development															
Reconvene with OPUC/Working Group on final proposed solutions															
New measure development - Whole Building and MSO															
Marketing, Form, and workbook updates															
Roll out new offerings to market January 1, 2022															





# 2021 State Legislative Briefing

## Conservation Advisory Council

February 17, 2021





Session



Bills



Committees



More

2021 Regular Session

Session Details for Wednesday, February 10, 2021

Pick a new date



Senate Chamber not scheduled

House Chamber not scheduled

Meetings Today

Committee

Me

Senate Committee On Judiciary and Ballot Measure 110 Implementation

Re

House Committee On Judiciary House Subcommittee On Equitable Policing

Re

House Committee On Behavioral Health

Re

Joint Committee On Ways and Means Subcommittee On Natural Resources

Re

Joint Committee On Ways and Means Subcommittee On Transportation and Economic Development

Re

Joint Committee On Information Management and Technology

Re

House Committee On Early Childhood

Re

House Committee On Energy and Environment

Re

Joint Committee On Ways and Means Subcommittee On Education

Re

Joint Committee On Ways and Means Subcommittee On Public Safety

Re

Senate Committee On Health Care

Re

Senate Committee On Finance and Revenue

Re

Joint Committee On Ways and Means Subcommittee On General Government

Re

Senate Committee On Education

Re

House Committee On Judiciary House Subcommittee On Civil Law

Re

House Committee On Business and Labor

Re

Senate

Conduct

Education

Energy and Environment

Finance and Revenue

Health Care

Housing and Development

Human Services, Mental Health and Recovery

Judiciary and Ballot Measure 110 Implementation

Labor and Business

Natural Resources and Wildfire Recovery

Redistricting

Rules

Veterans and Emergency Preparedness

House

Agriculture and Natural Resources

Behavioral Health

Business and Labor

Conduct

Early Childhood

Economic Recovery and Prosperity

Education

Energy and Environment

General Government

Health Care



## Bills monitored by staff are related to

- Public purpose charge (Energy Trust core funding)
- Oregon Public Utility Commission powers and duties
- Energy efficiency, codes and standards
- Renewable energy, 100% clean energy
- Transportation electrification
- Wildfire recovery and preparation
- Environmental justice and energy equity

# House Bill 3141

Sponsored by COMMITTEE ON ENERGY AND ENVIRONMENT (at the request of Representative Pam Marsh)

## SUMMARY

The following summary is not prepared by the sponsors of the measure and is not a part of the body thereof subject to consideration by the Legislative Assembly. It is an editor's brief statement of the essential features of the measure **as introduced**.

Reduces public purpose charge for retail electricity consumers within service areas of electric companies and Oregon Community Power. Modifies allocation of funds collected through public purpose charges.

Requires recovery in rates by electric company of funds necessary to plan for and pursue all available energy efficiency resources that are cost effective, reliable and feasible. Allows for credit against amounts recovered in certain circumstances.

Modifies reporting requirements for nongovernmental entity that is paid certain funds as directed by commission.

Requires Public Utility Commission to establish and update metrics for assessing, addressing and creating accountability for environmental justice in expenditure and investment of funds collected for certain purposes and paid to nongovernmental entity. Requires reporting by nongovernmental entity on progress in achieving equity metrics.

Temporarily increases, by \$10 million annually, funds collected by electric companies for low-income electric bill payment and crisis assistance. Sunsets January 2, 2024.

Declares emergency, effective on passage.

## Bills of potential interest to CAC members

- Allowing the OPUC to set utility rates based on energy burden and other inequities (HB 2475, HB 2490 – *not identical*)
- Increasing intervenor funding access at the OPUC (HB 2475)
- Establishing a grant program to repair and rehabilitate homes (HB 2842, SB 276 – *not identical*)
- More efficient appliance standards for ~dozen appliances (HB 2062)
- Code amendment to allow cities and counties to adopt voluntary REACH code as minimum building code (HB 2398)
- Expands resources and capabilities of Environmental Justice Taskforce (SB 286)



## Discussion

### **Questions on the bills I presented on or bills within categories I didn't cover?**

- Public purpose charge (Energy Trust core funding)
- Oregon Public Utility Commission powers and duties
- Energy efficiency, codes and standards
- Renewable energy, 100% clean energy
- Transportation electrification
- Wildfire recovery and preparation
- Environmental justice and energy equity

### **Bills you would like to share information on or recommend staff monitor or learn more about?**



# Thank You

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