

## 2023 Budget Goals and Advisory Council Networking Meeting Agenda

### Hybrid format

Friday, October 21, 2022

10 a.m. – 1 p.m.

This is the third and final step in a series of advisory council working sessions held to help Energy Trust of Oregon staff draft the 2023 Budget and 2023-2024 Action Plan. This meeting is a combined meeting of the Conservation Advisory Council, Diversity Advisory Council and Renewable Energy Advisory Council, and will be a hybrid meeting.

**Note: The first hour of the meeting is open to the public. In-person attendance is available for council members and board liaisons only.**

### Attendance Options

For attendees attending the meeting virtually, register at:

<https://us06web.zoom.us/meeting/register/tZwoc-isri8sHNCLfOJaIHb7yR0R5i998cpU>. After registering, you will receive a confirmation email with information about joining the meeting.

For council members or board liaisons attending the meeting in-person, the meeting is held at the Energy Trust office at 421 SW Oak St. Suite 300 in downtown Portland. The building is near MAX stations, bus stops and has street parking or parking lots nearby. **Visitors to our office need to be fully vaccinated with a booster** and we will need to verify vaccination status. Please email a picture of your vaccination documentation to [alina.lambert@energytrust.org](mailto:alina.lambert@energytrust.org).

### Agenda

<i>The meeting starts at 10 a.m. and is open to the public</i>	
10 – 10:15	<b>Welcome and Introductions</b> (Facilitator Angie Thomson) <ul style="list-style-type: none"> <li>Facilitator will review the meeting objectives and rules of engagement</li> </ul>
10:15 – 11	<b>Draft Organization Goals Presentation and Discussion</b> (Executive Director Michael Colgrove) <ul style="list-style-type: none"> <li>Presenter will present the draft 2023 Organizational Goals and where earlier council feedback is incorporated in the draft 2023 Budget and 2023-2024 Action Plan.</li> <li>Council feedback and discussion will follow</li> </ul>
<i>Meeting closes to the public at 11 a.m.</i>	
11 – 11:15	<b>Break</b>
11:15 – 12	<b>Council Networking and Relationship Building</b> (Facilitator Angie Thomson, Council Members and Board Liaisons) <ul style="list-style-type: none"> <li>Small group breakout sessions for in-person and virtual attendees</li> </ul>
12 – 12:10	<b>Wrap Up and Assessment Survey</b> (Facilitator Angie Thomson and Council Members)
<i>Hybrid portion of the meeting closes</i>	
12 – 1	<b>Lunch</b> <ul style="list-style-type: none"> <li>In-person attendees are invited to stay for lunch, which will be provided by Energy Trust.</li> </ul>

Meeting materials (agenda and reference materials) are available [online](#).

**Next meetings:** The next meetings are scheduled for the Diversity Advisory Council (Nov. 15), Renewable Energy Advisory Council (Nov. 16) and Conservation Advisory Council (Nov. 16).

# 2023 Draft Organizational Goals

# Draft 2023 Organizational Goals



Customers will save and generate energy and reduce costs in 2023 and beyond as a result of Energy Trust's investments in their clean energy projects and upgrades.



Utility partners, communities and policy implementers will achieve their objectives by leveraging Energy Trust's clean energy solutions that reduce greenhouse gas emissions, support grid management and deliver additional societal benefits.



Customers and stakeholders will gain future benefits from Energy Trust's investments in preparing for a more dynamic and complex energy industry.

# 2023 Goals



## **Goal 1: Customers will save and generate energy and reduce costs in 2023 and beyond as a result of Energy Trust's investments in their clean energy projects and upgrades.**

Energy Trust will help customers save 48.4 aMW of electricity and 6.9 million therms of natural gas and generate 5.9 aMW of renewable energy. Electric savings include demand reduction of 65.2 MW during periods of summer peak and 77.6 MW during periods of winter peak. Energy Trust will accomplish this goal through the activities in our budget and action plan, including:

- Providing homeowners, business owners, renters, industrial customers, communities, municipalities, farmers and ranchers with incentives and other financial support, technical assistance, access to a qualified Trade Ally Network, education and information.
- Growing and diversifying our Trade Ally Network, with a focus on contractors of color and those in rural areas, so customers have a greater selection of contractors that understand their needs and lived experiences.
- Serving customers with high energy burdens and those experiencing low incomes with customized offers, including offers informed by community engagement activities.
- Providing customers with broader information on energy-efficient equipment options regardless of their chosen fuel source.

# 2023 Goals

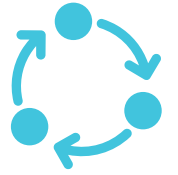


## **Goal 2: Utility partners, communities and policy implementers will achieve their objectives by leveraging Energy Trust's clean energy solutions that reduce greenhouse gas emissions, support grid management and deliver additional societal benefits.**

Energy Trust will accomplish this goal through the activities in our budget and action plan, including:

- Supporting gas utility decarbonization efforts by helping transport customers of Cascade Natural Gas and Avista save natural gas.
- Building trust among communities that we have historically underserved by increasing our cultural sensitivity, expanding awareness of past and ongoing harm, and engaging to understand current perspectives through increased outreach and community presence.
- Enhancing the tools and strategies available to help utilities to manage their systems by supporting targeted load management, system demand management projects and distribution system-connected technologies.
- Providing community-based organizations opportunities to learn from one another by creating a network or cohort of organizations active in clean energy and offering additional resources to further mutual objectives.
- Providing the OPUC, legislature, and federal, state and local governments with the information they are seeking related to energy efficiency, renewable energy, delivery approaches, community engagement and other related energy policy issues.





## **Goal 3: Customers and stakeholders will gain future benefits from Energy Trust's investments in preparing for a more dynamic and complex energy industry.**

Energy Trust will accomplish this goal through the activities in our budget and action plan, including:

- Investing in program structures, systems and approaches that better serve holistic and integrated needs for energy efficiency, renewable energy, resiliency, storage and grid-connected technologies.
- Providing communities and municipalities easier and more efficient access to comprehensive cross-program offers by adapting organizational structures, such as launching a new Communities and New Initiatives sector.
- Supporting OPUC and utility objectives for affordable, reliable energy systems by building out data systems and our ability to analyze the demand and capacity value of energy efficiency to ensure we can reduce time of use, peak and carbon impacts.
- Meeting evolving customer needs by hiring, onboarding, and retaining staff to ensure we have the resources needed to plan, analyze, deliver, track and report results on expanding and increasingly complex programs and offers.

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## Input On Customer and Community Specific Topics

### Effective community engagement

- Strong support for doing more community engagement in 2023-2024
- Conduct marketing and outreach in culturally relevant ways
- Be considerate and mindful of the impact of the language we use when interacting with different customers and communities
- When community needs are identified, be action oriented
  - o Less planning & reporting, more doing the work
  - o Less bureaucratic/programmatic, more innovative/non-linear
  - o Start small. Experiment. Iterate. Build trust and momentum with community partners incrementally over the long term.
- Compensate community partners; hire from within the community
- Visit schools – highlight the clean energy industry as a viable career path

### Serving rural customers

- Allocate significantly more resources to rural
  - o Low-cost/No-cost offers to engage customers
- Improve access to contractors
- Increase in-person presence in rural communities
- Partner with CBO's and individual “pillars” in rural communities
  - o View as relational not transactional
  - o Compensate community members for extra time
  - o Hire people from rural communities

## Input on Sector Specific Topics

### Residential Sector: Balancing standard and enhanced offers

- Cost effectiveness and equity are both important
  - o Continue both standard and enhanced offers
- Implement enhanced offers in a targeted way
  - o Focus on customer segments we know we have not historically reached
    - I.e. Rural, BIPOC, counties with low average incomes
- Leverage the exception process
- Reduce barriers
  - o Eliminate self-attestation requirement on rebate forms
  - o Reduce paperwork burden for customers
- Raise incentives for trade allies to promote enhanced offers
  - o E.g. Sales incentives (SPIFF's)

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### Commercial Sector: Tailoring offers for small business customers

- Look at usage patterns - target small businesses with high energy usage
- Conduct outreach & partner with vendors they would normally use for improvements
- Reduce forms/paperwork – the time they can spend on forms is minimal
- Partner with utilities to promote offerings
- Conduct direct outreach (door-to-door)
- Overcome language barriers for non-English speaking business owners
- Ways to develop offers
  - o Different incentives for owners vs. tenants
  - o Financing to address cost barriers

### Renewable Energy Sector: Meeting both HB 3141 25% spending requirement and equity goals

- Be targeted with resources and strategic in achieving goals; customize program design for specific locations to achieve targeted goals
- Focus on customers with low incomes to achieve goals
  - o Solar is best option for bringing RE benefits to customers with low incomes but look beyond rooftop solar (eg. cooperative ownership models, virtual net metering, Solar+Storage clusters, etc.)
  - o Establish long term relationships with CBO's to advance this work
  - o More low-cost and no-cost offers by layering incentives
  - o Higher incentives
- Workforce development
  - o Continue to diversify and expand the contractor network
- Increase and improve outreach efforts
- Target rental properties and work with housing providers/landlords
- Explore innovative program and funding ideas, including:
  - o Cooperative ownership models
  - o Community resilience hubs
  - o Dedicated micro-grids for specific communities

### Renewable Energy Sector: Helping customers understand and access the full value of renewable energy

#### **Recognizing the full value of Renewables (in addition to generation):**

- Resilience (during outages with battery storage systems)
- Energy independence (for individual customers and communities)



## Summary of Advisory Council (CAC-RAC-DAC) input on “deep-dive” topics relevant to action planning for 2023-2024.

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- Emergency preparedness; critical public safety services
- Climate change; reducing greenhouse gas emissions
- Grid flexibility; grid resilience; distributed generation

### Measuring the full value of Renewables:

- Measure real world outcomes (ie. impact, not just project completion)
- Quantify resilience - create “**resilience metrics**” and measure benefits on a spectrum with real outcomes.

### Unique role of value (what should we be doing that we are not):

- Explore these opportunity areas for innovative program development:
  - o Funding
  - o Cooling
  - o Resilience
  - o Co-ownership and community partnership
  - o Better serving renters
  - o One-stop concierge service
  - o Building upgrades
  - o Community Energy Planning
  - o Micro-grids
  - o Education
  - o Support grid flexibility/grid management