

**Conservation Advisory Council Meeting Notes**  
June 29, 2022

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**Attending from the council:**

Jeff Bissonnette, NW Energy Coalition  
Jake Wise, Portland General Electric  
Kari Greer, Pacific Power  
Monica Cowlshaw, Cascade Natural Gas  
Roger Kainu, Oregon Department of Energy  
Lisa McGarity, Avista  
Tina Jayaweera, Northwest Power and  
Conservation Council

Anna Kim, Oregon Public Utility  
Commission  
Becky Walker, Northwest Energy Efficiency  
Alliance  
Laney Ralph, NW Natural  
Kerry Meade, NEEC  
Dave Murphy, BPA  
Brent Coleman, Davison VanCleve

**Attending from Energy Trust:**

Hannah Cruz  
Elizabeth Fox  
Elaine Dado  
Austin Zeng  
Alex Novie  
Steve Lacey  
Tom Beverly  
Fred Gordon  
Kate Wellington  
Tracy Scott  
Amanda Potter  
Adam Bartini  
Amber Cole  
Mark Wyman  
Michael Colgrove  
Emma Clark  
Spencer Moersfelder  
Greg Stokes  
Kirstin Pinit  
Alina Lambert

Scott Leonard  
Fabian Guerrero  
Marshall Johnson  
Melanie Bissonnette  
Thad Roth  
Amanda Thompson  
Wendy Gibson  
Cheryle Easton  
Karen Chase  
Sue Fletcher  
Caryn Appler  
Jackie Goss  
Jay Ward  
Ryan Crews  
Shelly Carlton  
Dave Moldal  
Oliver Kesting  
Huong Tran  
Paul Fredrickson  
Sletsy Dlamini

**Others attending:**

Cynthia Kinney, Cascade Energy  
Cheryl LaCombe, TRC  
Ciera Milkewicz, CLEARResult  
Shannon Todd, TRC  
Eric Wilson, Evergreen Consulting  
Henry Lorenzen, Energy Trust Board of Directors  
Brooke Landon, CLEARResult  
Guillermo Castillo, Small Business Utility Advocates  
Alder Miller, CLEARResult  
Brian Lynch, AESC

## **1. Welcome and announcements**

Hannah Cruz, senior stakeholder relations and policy manager, convened the meeting at 1:30 p.m. via 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 opened with a summary of the agenda and led a round of introductions. Hannah also discussed recruiting for additional Conservation Advisory Council members and asked current members to reach out to people they know who may be interested. Application closes on July 11.

## **2. Update on supporting wildfire recovery**

### *Topic summary*

Scott Leonard and Karen Chase discussed efforts around wildfire recovery. Scott recognized Program Management Contractor staff members Cheryl Lacombe, Kyle Kent, Angalee O'Connor who are working directly with customers and helping design the offers. Offers have been developed and launched.

The 2020 Labor Day fires were an unprecedented concurrence of conditions. More than 5,100 structures were affected, and more than 4,000 homes were destroyed. Incentives were based on outreach and community input.

The Building Codes Division (BCD) allowed rebuilding homes to older code, allowing more room for incentives for rebuilding. Incentives increase based on how far the home goes beyond code. This also created bonuses for wildfire resilience features.

Manufactured Home Replacement was moved from a pilot to a program. Some manufactured home parks are rebuilding while others are doing something different or are undecided. Production timelines, site availability and new community requirements pose barriers. One project has been completed, but 15 are in the pipeline and eight more are showing interest.

New Buildings provides more value by getting involved early in the process. Bonuses have been added for early design assistance and technical assistance. Coordination with other organizations is key. The Oregon Department of Energy is offering incentives which can be paired up with Energy Trust. BCD received grants to make homes more fire resilient and the funding can also be paired with Energy Trust incentives.

This is a small part of a solution to a big problem. Rebuilding and new offer development takes a long time. Approachable support and programs, Spanish materials and interpretation are needed. Energy efficiency and renewable energy are not always considered. Resilience is now part of the conversation. Survivors benefit from central points-of-contact and coordination.

### *Discussion*

Council members noted that communities have recognized that there are opportunities to build back better. Funding will only go so far if there are continued one-off events.

Council members asked if the ability to claim energy savings from previous code is in law, or if it is a one-off. Staff noted that it's in statute but is time-limited and calls out the specific disaster.

Council members asked if there are efforts at the state level to do a debrief and discuss lessons learned. Staff responded that there are some efforts to align building codes with wildfire prone areas. Efforts are in place to try to avoid putting barriers in front of people to rebuild, but to also recognize the risk areas.

The council discussed what the potential volumes of these kinds of events are and if there is any thinking around this for budgeting purposes. In addition, it discussed in situations with a high risk overlapping with Energy Trust areas if there is a reserve and a way to quickly trigger it.

Council members asked if staff have talked to California or other places that have faced similar challenges. Staff explained that in New Construction, Energy Trust worked with TRC, the firm that runs programs in California, and that has benefitted from their experience. Requests have been received from other organizations and the media. This is still new, so the more that can be shared, the better. The American Council for an Energy-Efficient Economy best practices might be helpful. There is a lot of exchange between organizations aimed at recovery, but an organized effort in the West Coast has not yet occurred.

#### *Next Steps*

Energy Trust will continue bringing updates annually. Once the two-year planned funding runs out, there may be some changes to offers.

### **3. Deep dive planning workshop**

#### *Topic Summary*

Deep Dive Workshop to help inform the 2023-2024 Budget and Action Plan. This was the second of three engagements with the Conservation Advisory Council planned as staff develop 2023-2024 energy efficiency services and incentives. The first engagement occurred in April where staff gathered the council's thoughts on market trends, customer needs and emerging opportunities in energy efficiency.

During this second session, council members explored three topics on ways to better reach and serve rural customers; ways to identify and serve the different types of small businesses; and thoughts on how staff should evaluate and prioritize the relative value of standardized market-wide offers versus enhanced offers focused on specific customer segments.

Council feedback was collected through small group breakout sessions. Overall themes included:

- How are rural customers defined?
  - Lack of access to a lot of things available in the cities. An hour outside of a major town will be a barrier to obtaining supplies and services (contractors)
  - Poverty levels
- Determine what organizations communicate with customers and connect with them
- Understand city management who know the community-based organizations, who to listen to and who may not be as helpful. Energy Trust should reach out to city managers
- Word of mouth is important in rural communities
- Low-cost and no-cost measures for helping engage customers
- Group customers by geography to better serve them. Broadly consider all the benefits
- Partnerships could help – examples include Office Depot accounts, banks and insurance companies
- Using community gathering places like stores, rec centers and restaurants to reach communities
- Small businesses may be more different from each other than similar
- Amount of staff time and resources to spend with Energy Trust
- Financing is challenging. Should consider lending opportunities
- Instant incentives for some equipment could reduce barriers

#### *Discussion*

Specific points captured on the online Mural board. Some feedback from the council:

- Seek to define "rural" more consistently

- Overlay customers with federal poverty data and what customers are getting assistance to understand where there are areas to target
- There is a need to understand the challenges rural customers face individually, like access, distance, remoteness and the lack of available contractors
- Partner with community-based organization who have gained the trust of communities and understand best communication modes to reach individuals
- Reach out to city managers, county managers, economic development agents
- Find energy champions that can speak on the benefits of energy efficiency
- Balancing standardized market-wide offers versus enhanced offers focused on specific customer segments
- Cost effectiveness is main priority, but staff need to also focus on equity
- More tools to balance cost effectiveness with other goals
- Thinking about other non-energy benefits or economic factors, like the value of getting a contractor into a rural area
- Standard cost offers are helpful for making things affordable
- Small businesses
  - What are their needs?
  - Small businesses tend to have fewer resources (staff, time, etc.)
  - Barriers for small businesses include inflation and supply chain disruptions. These are difficult for small businesses to overcome
  - Home-based businesses may need different messaging
  - How to reach them?
    - Outreach to vendors that would normally be used for improvements
    - Overcoming first cost barrier - maybe instant incentives for certain types of equipment
    - Payback period may be smaller, or turnover may negate the opportunity
    - Partner with utilities to promote available tools to help businesses manage energy use
    - Personalized outreach through Resource Assistance for Rural Environments Program members or community colleges
    - Increase language accessibility in forms/services
  - Suggestions on meaningful ways to categories to better serve
    - Look at energy usage patterns to identify energy intensive businesses
    - Look at number of employees, yearly revenue, ownership structure, possibly insurance type

#### *Next steps*

Energy Trust will prepare a written summary of the ideas gathered. There will be transparency across all advisory councils. Staff will work on budgets and action plans over the next two months and re-engage with advisory councils in September or October, possibly in a joint council meeting.

#### **4. Public comment**

There was no additional public comment.

#### **5. Adjournment**

The meeting adjourned at 4:30 p.m. Meeting materials are available [online](#). The next meeting will take place September 14. Staff are determining details, including whether it will be a joint meeting with other advisory councils.

## Appendix A: Deep Dive Workshop Summary

The following is a summary of the Conservation Advisory Council 'deep dive' planning session and discussion topics highly relevant to action planning for 2023-2024. Energy Trust staff are now reviewing the comments, perspectives and suggestions for consideration as action plans are developed.

### Topic #1 – Serving Rural Customers

#### ***How does Energy Trust find rural customers and effectively engage with them?***

- Need to define "rural". How does the community see themselves?
- Rural is defined differently in different situations - cohesive definition would be helpful
- Quantitative and qualitative measures to understand rural areas
- Overlay customers with federal poverty data, what customers are getting assistance, look at where there are areas to target
- Don't have to be directly embedded in the community but need to understand the challenges they face individually
  - Access, distance, remoteness
  - Availability of contractors in rural areas is a barrier
    - What are the steps and how to help get them resources?
- Partner with community-based organization who have trust in communities and understand best communication modes to reach individuals:
  - recruitment
  - facilitate
  - analyze and synthesize

#### ***What information, data or systems could be leveraged to learn more about rural customers?***

- The upcoming [Residential Building Stock Assessment](#) (RBSA) data will include urban/rural strata. Previous versions would need to approximate it issuing zip code and city.
- Different categories of ratepayers
- [American Community Survey](#) (ACS) data is helpful but doesn't explain how to communicate with people in small ways.
- Ranking counties on poverty level- added layers for urban, rural and frontier and conduct outreach

#### ***How can Energy Trust better engage with and integrate into rural communities, including rural municipalities, main street businesses and workers in the agricultural sector?***

- Customers are community-oriented in rural areas - word of mouth.
  - Word of mouth does a lot of good in rural communities
- Reach out to community-based organizations for suggestions on how to reach rural communities
- Reach out to city managers, county managers, economic development agents
- Find energy champions that can speak on the benefits of energy efficiency
- Meet people at food banks or grocery stores with free energy saver kits & discuss energy efficiency
- Meeting people at events or pop up at the grocery store, etc.
- Being in the community and taking the time to listen to the concerns
- Understanding of the varied service areas and resources available

***How should Energy Trust design and deliver programs, incentives and marketing strategies tailored to rural customers?***

- Low-cost/No-cost to engage customers
- Keep Energy Saver Kits available to aid accessibility
- Maintain measures accessible for residential customers
- Accessible programs for all types of utilities
- Preserve residential measures (kits, low-cost measures)
- Leverage other infrastructure already in place that Energy Trust could dovetail with
  - E.g., woodstove changeout

***Other insights***

- Klamath, Lake and Lane counties top of “low-income” list
- How can Energy Trust meet their need and if not, can they be referred?
- Isolation in larger communities creates the experience of being in a rural community

**Topic #2 – Balancing standard and enhanced offers**

***How does the Residential program evaluate and prioritize the relative value of standardized market-wide offers versus enhanced offers focused on specific customer segments?***

- Cost effectiveness is main priority
- Acknowledge cost effectiveness, but also focus on equity
- Whether or not savings goals are achieved at a cost-effective rate
- Identify areas that are hard to reach and share with Oregon Public Utility Commission
- Where is the market going to catch up eventually? Where are the areas that will not catch up to focus on?
- More tools to balance cost effectiveness with other goals
- Are there other non-energy benefits or economic factors that should be considered?
- Efforts should depend on how many people Energy Trust has been unable to reach
- Exclusivity and participation by trade allies should be considered
  - Are trade allies incentivized to promote standard vs. enhanced offers?
- Acknowledge if thinking differently about reach, may not always be cost effective
- Some situations where cost effectiveness can be reconsidered
- Leverage exceptions

***What is the right balance between standard approaches and enhanced offerings?***

- Balancing act between *acquiring savings* and *reaching customers* (as a framework)
- Balancing act to acquire savings and create access to all customers.
- Goal: spend enough money to create action.
- How is equity balanced? Can this be factored in with cost effectiveness goals?
- Much harder to achieve services to harder to reach customers without enhanced offers
- Standard cost offers are helpful for making things affordable

***What factors should be taken into consideration when assessing the relative value of standard and custom offerings?***

- Could a community benefit from having more advanced infrastructure installed?
- Consider non-energy benefits like value of getting a contractor into a rural area
  - Rural customers often pay more to get contractors

- Reduction on energy burden since there will be less bill discount needed if energy efficiency has been done
- Factors: Are you able to reach customer segments that you were previously unable to reach?
- How to define/measure 'hard to reach' customers?

#### **What would indicate we are out of balance?**

- If participation among contractor starts to decrease – that's a sign it's out of balance
- Complexity in offerings. Keep it simple.
- Contractors are part of the solution, balancing.

#### **Other insights?**

- Self-attestation on the rebate form
  - Do customers need to sign income attestation in areas known to have lower income?
- Consider paperwork barriers - removing them allows more customers to be served
- Availability of trained contractors is a hurdle - Sales Performance Incentive Funds (spiffs) and ways to engage contractors?
- Deploy resources from elsewhere. Cover travel costs or offer spiffs for covering rural areas.
- Training like the Home Depot does on how to install items
- Might be a program that is not cost effective because population targeted is hard to reach and accommodations are needing to be made
- If advanced metering is installed, there is faster response to outages and better data available
- How does building density impact microgrids for resiliency?

### Topic #3 – Serving Small Business Customers

#### **What do you think are the meaningful ways of categorizing small businesses for the purpose of offering relevant and accessible energy efficiency and renewable energy offerings?**

- [Energy usage] Focus on businesses that are energy intensive. Target those with high energy costs and help them reduce.
  - Opportunity to look at business types with usage patterns
- Need to understand differing definitions of small and medium businesses - based on number of employees, yearly revenue.
  - "Small commercial" has multiple meanings – it doesn't mean one specific thing
- "Small business" customers are a challenging group to reach as they may be more different than the same
- Power Council recommends building out an Energy Use Intensity database to help identify high users
- Size – number of employees, annual revenue
- Technology vs. ownership for segmenting businesses
  - Can they be categorized by technology (e.g. using refrigeration vs. not)?
- What's the ownership (person vs. corporation)?
- Most small businesses have insurance. The insurance type may help identify the businesses type.

- Banks catering to small businesses may help with identification.

***Where do small business customers needs most clearly converge and diverge, that program staff should consider when designing programs?***

- Different perspective: Who needs help and how can Energy Trust provide resources?
- Small businesses tend to have fewer resources (staff, time, etc.). How to reach them?
- Barriers for small businesses: Inflation, supply chain disruptions. Difficult for small businesses to overcome
- Different incentives for owners vs. tenants
- Outreach to vendors that they would normally use for improvements
- Are there constraints on availability of contractors to do the work?
- Overcoming first cost barrier - maybe instant incentives for certain types of equipment.
- Payback period may be smaller, or turnover may negate the opportunity

**How might Energy Trust develop offers to meet emerging customer needs?**

- Financing available to these customers? How to address cost barrier?
- Work with building owners with tenants to improve shell & HVAC
- Home based businesses - served through Residential - may need different messaging
- financing available to these customers? How to address cost barrier.
- Time and effort they can spend on forms is small

**How can Energy Trust help small business customers learn about and access these offerings?**

- Partner with utilities to promote available tools to help businesses manage energy use
- Personalized outreach through Resource Assistance for Rural Environments Program members or community colleges
- Additional outreach to customers for updated information re: financing preferences
- Increase language accessibility in forms/services
- Meet and share information with businesses owners.
  - E.g., accounts with banks, insurance, Home Depot, Office Depot, etc.
- Be aware, where are the community gathering points?
  - Local chains may be a good place to focus (Burgerville, Dutch Bros)
  - Work with whole business chains/franchises.
- What businesses mainly serve rural customers? (e.g., Wilco, Coastal, Ace Hardware)
  - Find out where the community centers are - Thriftway, restaurants, others
    - Thriftway in Forks, WA is a focal point/hub for the community (bulletin boards and engagement)
- Bring resources together - what resources do they need? Coaching on bookkeeping, marketing planning, etc. to help businesses grow