

## Conservation Advisory Council Meeting Notes

April 19, 2023

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### Attending from the council:

Andy Cameron, Oregon Department of Energy  
Lisa McGarity, Avista  
Charity Fain, Community Energy Project  
Noemi Ortiz, Cascade Natural Gas  
Laney Ralph, NW Natural  
Jake Wise, Portland General Electric

Becky Walker, NEEA  
Kerry Meade, NEEC  
Kari Greer, Pacific Power  
Tina Jayaweera, NWPCC  
Jeff Bissonnette, NWECC  
Anna Kim, Oregon Public Utility Commission

### Attending from Energy Trust:

Hannah Cruz  
Elizabeth Fox  
Elaine Dado  
Tom Beverly  
Jay Ward  
Themba Mutepfa  
Greg Stokes  
Steve Lacey  
Andy Nix  
Amanda Thompson  
Tara Crookshank  
Alanna Hoyman-Browe  
Alex Novie  
Cheryle Easton  
Sloan Schang  
Cameron Starr  
Shelly Carlton

Sue Fletcher  
Mark Wyman  
Thad Roth  
Cody Kleinsmith  
Michael Colgrove  
Danielle Rhodes  
Melanie Bissonnette  
Julianne Thacher  
Amanda Potter  
Adam Bartini  
Jackie Goss  
Amanda Zuniga  
Kathleen Belkhat  
Taylor Ford  
Wendy Gibson  
Jeni Hall  
Mia Deonate

### Others attending:

Candice Norton, Resource Innovations  
John Molnar, Rogers Machinery  
Benedikt Springer, CAPO  
Ross Ferguson, ICF  
Melanie Stutler, Taper Solutions  
Chris Smith, Energy 350  
Henry Lorenzen, Energy Trust board  
Louis Bartlett, ICF

Brooke Landon, CLEARResult  
Jenny Sorich, CLEARResult  
Kheoshi Owens, Empress Rules  
Peter Therkelsen, Energy Trust board and CAC liaison

## 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/wp-content/uploads/2023/01/CAC-Packet-April-2023.pdf](http://www.energytrust.org/wp-content/uploads/2023/01/CAC-Packet-April-2023.pdf).

## 2. Council Membership Changes

### *Topic summary*

Hannah Cruz discussed recent member changes and thanked council member Tim Hendricks, who is retiring and stepping down from the council after volunteering since 2017. Tim has been

a lead facility manager, including for Unico Properties, and at many downtown buildings over the years. He represented Building Owners and Managers Association on the council. Tim championed commercial Strategic Energy Management and many other energy efficiency efforts in buildings of all sizes and age, including work on the historic Montgomery Park.

#### *Discussion*

The council thanked Tim for his time and service.

#### *Next Steps*

None

### **3. How We'll Work Together** *(continued from February)*

#### *Topic Summary*

Hannah Cruz continued the discussion on developing community agreements—agreed upon ways in which council members will behave and hold each other accountable while working together. Council members were placed into breakout rooms to develop community agreements and share back with the group. Discussion questions are included in the [Conservation Advisory Council meeting packet](#).

#### *Discussion*

Council members see community agreements as vitally important to respectful discourse and participating in a safe space (Jake Wise).

Members from breakout group one highlighted the importance of trust, which came from meetings and small groups that went well. There is a need to build a trusting framework and good facilitation. This means investing upfront in small groups and meetings to get to know each other, which pays off in the end, especially when healthy conflict is needed or there is contentious subject matter. Members added that the council has a wide variety of experience and backgrounds, so it's helpful to have summaries, pros/cons, background information and relevance for the various groups and represented entities. Anything to help the wide variety of members engage is helpful.

Council members from breakout group two highlighted a need to support moderators as they work to uphold agreements and remember that members are working together. If one person dominates a discussion, others need to speak up and inject their ideas. They mentioned a need for clear goals and expectations, along with clarity about what needs to happen next. The group also highlighted the importance of reading materials in advance, at least at a high level.

Breakout group three pointed out the importance of strong facilitation. Meetings that have gone well have been characterized by good participation from everyone, due to good facilitators. Meetings are less interesting when they focus on listening to only one or two speakers. Strong facilitation helps encourage participation.

Members stated that virtual tools, like pulse polls, are helpful in virtual meetings. Body language is important, and it may be helpful to hold at least some meetings in-person. It's also important to respect everyone's time by meeting for only as long as needed. Effective time management is important. Members also mentioned that trust-building is important, but some people may be less comfortable with sharing personal information. Ice-breaker questions may contribute to discomfort and should be considered carefully.

Staff added that having the group itself commit to being a community and helping facilitators is important.

#### *Next steps*

Hannah Cruz invited additional feedback. Notes from the discussion will be sent out to council members as an email or shared at a future meeting.

#### **4. Strategic considerations and market insights**

##### *Topic Summary*

Council members were asked to share insights about what they see in the market that Energy Trust should consider when planning for the coming year and beyond. This was the first of two sessions focused on strategic considerations. The session was facilitated by Alanna Hoyman-Browe, who is working with Energy Trust on the budget and planning process, with a specific focus on stakeholder engagement. Members were asked to comment on industry trends, customer needs and emerging opportunities from their perspectives.

##### *Discussion*

###### Industry Trends:

Members stated that one of the biggest issues is with respect to labor. Oregon employment department 2030 projections show a 20% or greater increase in need for electricians and plumbers (Jake Wise). Members also mentioned big picture changes and energy affordability issues for customers persist even with new low-income bill discounts. In reality, rates will continue going up. Even with unprecedented investment in energy efficiency it's unclear how low-income households will access programs and services. Community Energy Project is assisting with households that have been left behind in multiple energy transitions over the years. A staggering number of homes aren't ready for investments because of deferred maintenance. These include roofs needing repairs, unsafe or old electrical conditions and other things Energy Trust doesn't fund. There is also a trend toward greater public interest. People want to know more, not just about their own homes, but also about broader transitions at utilities. They want to know how peak load management impacts them personally and for resiliency. They want to be engaged more (Charity Fain).

Council members added that on the policy side, there is unprecedented need to work together to ensure collaboration and avoid overlapping efforts. There is a workforce development need, in addition to heating, ventilation and air conditioning systems (HVAC), which is dire in rural areas. Qualified energy auditors are needed, especially in rural areas. Oregon Department of Energy (ODOE) is attempting to make an impact in that area. The pending Senate Bill 870 alone could change staffing and logistical needs for ODOE (Andy Cameron). Members also mentioned that a lot is happening with the climate, such as erratic weather patterns and substantially lower levels of water in the hydro system in the Seattle area. Power companies there may need to purchase more power, which will impact customers downstream. More people and organizations are entering the market and showing interest, which creates more murkiness and uncertainty (Kerry Meade). Council members also said they would like to work with Energy Trust and ODOE on rural HVAC and other contractor development. There is high interest in getting services to far rural/frontier communities (Kari Greer).

###### Customer Needs:

Some council members pointed out that they help clients navigate through available resources, but there is still a current and projected need for navigation services, with so many opportunities – both now and in the future. People are having trouble figuring out who to speak with. Agencies also need help identifying the right resources (Andy Cameron, Charity Fain). Regulated multifamily is one thing, but other rental buildings need to be upgraded and no one knows quite how to solve the problem (Charity Fain). About 50% of Pacific Power territory is in rental units, which are denser in some places than others. A serious look is needed for ways to support renters, along with coordination of funds as federal funds get allocated. Smaller cities

and tribes may get these funds but not have the bandwidth or expertise to use them. It will be important to support them (Kari Greer).

Council members also stated that there is a lot of money floating around and discussion of putting heat pumps into people's homes. There is a substantial need for contractor training to ensure quality installation. The market may not be developed enough for the money coming in (Kerry Meade). Capacity issues often come up. There are a lot of resources to push out into the community, but many agencies are at capacity. They may not be able to distribute funds to individuals. Cascade Natural Gas is creating a consumer advisory group. Thinking is needed around how to alleviate capacity issues (Noemi Ortiz). It's important to consider how to effectively distribute these dollars. A better understanding of program eligibility requirements is needed, which aren't consistent between state and federal programs. Additionally, deferred maintenance requirements need to be understood. Over 1/3 of Portland General Electric customers have electric resistance heating. Of those, 80% are renters and 70% of them are in condos or apartments. Best use of funding needs to be understood well ahead of 2024 (Jake Wise).

#### Opportunities:

Council members see an opportunity in looking at commercial buildings more holistically when combined with vacancy rates due to the pandemic and trends in commercial real estate. Legislation may help to make this a big opportunity. HVAC upgrades are a big focus area for funding. Envelope improvements may become a good opportunity to help resize HVAC systems (Becky Walker). The Portland Clean Energy Community Benefits Fund (PCEF) is huge in the Portland area, and how Energy Trust thinks about it is important. PCEF wants to do 300 low-income households per year with a \$45,000 investment per household. There are major opportunities for how to use resources creatively. If Portland has that kind of investment, how can other parts of the state do similarly (Charity Fain and Jake Wise)? It's important to support the nonprofits going after PCEF dollars with technical assistance, grants and programs. Affordable multifamily is fast-tracked within PCEF's investment plan. There is a big opportunity for deployment of high-efficiency water heating, heat pumps and solar (Jake Wise).

#### Strategic Priorities:

Council members recommended that strategic priorities should include making services accessible, reducing jargon, reducing unnecessary requirements and ensuring that more customers get access (Lisa McGarity). Affordability should also be a priority. Portland General Electric's income-qualified program can be spread by increasing participation in energy-efficiency measures among customers (Jake Wise). The council added that Energy Trust has a good role to play in convening many of the active groups that focus on education. The Low-Income Solar Working Group is an example of Energy Trust playing that role. There is a big learning curve in the energy sector, and Energy Trust could play a much bigger role in educating. Energy Trust can help develop community-based organizations to roll programs out – not just focus on workforce development. Communities can't be left behind (Charity Fain). The council also mentioned that a lot has been going on with Washington new construction code, making it important to watch as it will diffuse into Oregon (Becky Walker). Staff summarized by saying that a lot is happening in late 2023 and 2024, leading to both excitement and trepidation. Not leaving people behind in the influx of funding is a tall order. Navigating and being Energy Trust's own support mechanism will be important (Hannah Cruz).

#### *Next Steps*

Alanna will return in July for deep-dive sessions where council members' expertise will be important. There will be a joint council meeting in October, to report on what was learned.

## **5. 2023 State Legislative Update**

### *Topic Summary*

Jay Ward provided an update on energy-related bills being monitored during Oregon's 2023 state legislative session, including a compact fluorescent/linear fluorescent bill (House Bill 2531) and the Resilient, Efficient Buildings bill package (Senate Bill 868, Senate Bill 869, Senate Bill 870 and Senate Bill 871).

Over 2,000 bills were introduced in January. Energy Trust began tracking 200 of them, but the number has fallen to about 80. The presentation [slides](#) include details on 12 important bills and a reminder that Energy Trust does not lobby or advocate in these or any settings.

### *Discussion*

Council members would like to see an analysis of the lighting savings impacts from House Bill 2531 if it passes (Tina Jayaweera).

### *Next Steps*

If the bill regarding lighting passes, Energy Trust will need to determine steps for the Business Lighting program and update the council.

## **6. Workforce development strategy, definitions and goals**

### *Topic Summary*

Kathleen Belkhat, commercial program manager, and Cameron Starr, senior customer service strategy manager, provided an update on Energy Trust's workforce development working group. In 2022, Energy Trust formed a workforce development workgroup to share ideas and come up with a shared definition and vision for Energy Trust's role in workforce development. Nine months in, staff have developed a foundation and are formalizing goals. Staff are eager to receive input from stakeholders as existing work moves ahead and new strategies are developed.

See [presentation slides](#) for full details.

### *Discussion*

Energy Trust works with Blueprint Foundation in a small capacity. The organization works with Black youth in the Portland area that primarily focus on residential construction. As part of high schoolers internships, Energy Trust is facilitating treasure hunts.

Some content from Bonneville Environmental Foundation is being used in the 3<sup>rd</sup>-5<sup>th</sup> grade after school energy class.

Council members pointed out that Community Energy Project is a licensed contractor and could use staff development in energy audits, HVAC sizing and technical skills. Community-based organization staff are sometimes left out of these kinds of programs (Charity Fain). Attendees pointed out that Black women were included in the presentation and expressed appreciation (Kheoshi Owens). Members asked what kind of support contractors are receiving for people of color (Lisa McGarity). Staff responded that Energy Trust is planning to launch diversity, equity and inclusion training this year, and serving low-income customers is the current priority (Cameron Starr).

Attendees stated that the approach is very intentional, and that Energy Trust has come a long way since 2018. It's important to prevent harm, questioning how mentors are being prepared to work with mentees and how cross-cultural conflict will be handled, including a mediator on staff to help navigate (Kheoshi Owens). Staff agreed that Energy Trust has grown, and staff appreciate the acknowledgement and collaboration. Staff added that directions for feedback are provided, and feedback can be emailed to the workforce development team or sent to

Lighthouse Services, as a third party. Lighthouse feedback and concerns are sent to a select group on Energy Trust's executive team. Energy Trust will consider a mediator for cultural conflicts as recommended by the council (Kheoshi Owens, Cameron Starr).

*Next Steps*

Staff will continue with its work and update the council at a later meeting as more progress is made.

**7. Public comment**

There was no additional public comment.

**8. Adjournment**

The meeting adjourned at 3:58 p.m. Meeting materials are available [online](#). The next meeting of the council will be Wednesday, May 17, 2023.