

Joint Advisory Council Meeting

October 12, 2023

Attending from the CAC:

Jeff Bissonnette, NW Energy Coalition
Kari Greer, Pacific Power
Lisa McGarity, Avista
Jake Wise, Portland General Electric
Laney Ralph, NW Natural
Kerry Meade, Northwest Energy Efficiency Council

Becky Walker, NEEA
Charity Fain, Community Energy Project
Corinne Olson, Alliance for Western Energy Consumers
Noemi Ortiz, Cascade Natural Gas

Attending from the RAC:

Ryan Harvey, Pacific Power
Angela Crowley-Koch, Oregon Solar + Storage Industries Association
Josh Peterson, Solar Monitoring Lab, University of Oregon
Brikky King, Fairway Mortgage

Amy Schlusser, Oregon Department of Energy
Jaimes Valdez, Portland Clean Energy Benefits Fund
Alan Beane, GeoGrade Contractors LLC
Joe Abraham, Oregon Public Utility Commission

Attending from the DAC:

Rhea Standing Rock, Sunlight Solar
Terrance Harris, Drexel University

Susan Badger-Jones
Indika Sugathadasa, PDX Hive

Attending from Energy Trust:

Alanna Hoyman-Browe
Elaine Dado
Elaine Prause
Michael Colgrove
Betsy Kauffman
Elizabeth Fox
Greg Stokes
Noemi Ortiz
Tracy Scott
Chris Dunning
Sloan Schang
Tom Beverly
Kirstin Pinit
Laura Schaefer
Janelle St. Pierre
Kirstin Sellers
Dave Moldal
Marshall Johnson
Cory Hertog
Melanie Bissonnette
Maddie Norman
Oliver Kesting
Scott Leonard
Themba Mutepfa
Mark Wyman

Kate Wellington
Adam Bartini
Ryan Crews
Megan Greenauer
Sue Fletcher
Ben Thompson
Kyle Petrocine
Lizzie Rubado
Scott Swearingen
Kathleen Belkhatat
Taylor Ford
Danielle Rhodes
Amanda Zuniga
Amanda Thompson
Dave McClelland
Cameron Starr
Helen Rabold
Ashley Bartels
Julianne Thacher
Amber Cole
Patrick Urain
Bayo Ware
Alex Novie
Lidia Garcia

Others attending

Jay Olson, Pacific Power
Jenny Sorich, CLEAResult
Peter Therkelsen, Energy Trust board
Brooke Landon, CLEAResult

Randy Hastings, DThree
Ed Barbian, CLEAResult
Alexia Kelly, High Tide Foundation

1. Welcome and Introductions

Alanna Hoyman-Browe convened the meeting at 1:20 pm by discussing community agreements and leading an icebreaker exercise.

2. Budget Discussion*Topic Overview*

Michael Colgrove presented the 2024 budget and organizational goals. Slides are included in the meeting packet and the full presentation is available in the meeting recording. The budget is posted online at www.energytrust.org/budget.

Alana Howe provided questions to give a framework for the budget discussion:

- Do these goals resonate with you?
- Do they seem appropriate given market dynamics?
- Is your input reflected in these?

Summary of Discussion

A council member shared their excitement for the trade ally development programs and asked which ones will also be available to solar contractors? (Angela Crowley-Koch). Staff responded that these will be available to efficiency and Solar trade allies. LatinoBuilt partnership could be extended to LatinoBuilt.

A council member asked if the new outreach staff are going to be located in their designated regions or in the Portland metro area (Josh Peterson). Staff responded that they will be based in the regions they serve for geographically-dedicated outreach roles.

Another council member shared their appreciation for the presentation and stated the goals as presented resonated. The member also stated the more people and partners they meet, the more optimistic they are for the future and noted there are so many things that are right on the money and in Energy Trust's wheelhouse.

Council members shared there is an opportunity for Energy Trust and community-based organizations (CBOs) to gather and determine how to administer all of the funding while it's available (Indika Sugathadasa). The next five years will be a huge opportunity and transformational change in decarbonization and energy. A lot of the real lifting will happen in 2025 and beyond. Workforce needs to be built now to be ready in 2025. There are resources in the Portland Metro area that will launch, but we can only serve Portland. There's a lot of need in other areas. Energy Trust and other state programs can build a web across the state to serve them. Training hubs will be very important and a lot will be learned along the way. They concluded with their strong support of the direction presented, and that it captures input given (Jaimes Valdez).

The council noted one thing often missing in workforce development is that it needs to go beyond contractors. CBO staff need to learn how to manage these programs, but that isn't

reflected in the workforce conversation. People need to understand the technology and language, but also understand the community. It takes a long time. Often people trained by organizations are then poached. The council member encouraged staff to think more broadly when it comes to workforce. There is a need to understand energy or they can't speak to the community about it. Also, when looking at capacity building, there has to be enough money to hire someone. If grants are small, it becomes extra work dumped on an existing staff member. Other CBOs often call upon organizations to share our expertise. There has to be peer mentorship funding as it is happening unfunded. There needs to be sharing of learnings in the trenches over many years (Charity Fain). Staff responded that the intent is to use the \$4 million in 2024 to help CBOs grow staff and their lines of business to help connect energy efficiency and renewables to the communities they serve. Staff are looking at CBOs in workforce development to build capacity.

Additionally, staff shared that there has been a lot of learning from the councils and others over the years. Staff have given this a lot of thought this year for the 2024 action plan and are thinking of a CBO network, somewhat like the Trade Ally Network. It will be a learning space and way to support growth for CBOs.

Staff stated that sometimes the organization does things right but doesn't realize it, and then moves on to other things. Staff asked the council what things the organization should do more of.

A council member shared that the Solar Working Group started years ago was transformational as it was a place to discuss and learn together. It was the right topic at the right time. The peer learning was great, and there was value in it (Charity Fain).

Another member explained that in the presentation for the board, this was around adding funding sources and how it becomes more difficult to manage. With the influx of funding for low-income customers and the amount of deferred maintenance, there becomes a sorting issue. There needs to be maintenance to move forward with energy upgrades. This needs to be considered (Lisa McGarity).

Conversation around the organizational goals showed overall support from the council. One member expressed that the goals are good goals and they support each other. The first goal of saving energy and reducing costs may be missing some of the growth and expansion piece. It's stated in the memos, but not so well in the first goal. For training contractors, it's difficult to set up advanced heat pump systems so they function well. There's a barrier for contractors to install them, so controls are one way of helping (Becky Walker). Another council member shared that one thing that could be enhanced in the goals is to call out how Energy Trust is doing with their DEI efforts. It could be added to point it out (Lisa McGarity). Other council members shared they feel these goals go deeper and broader than previous goals. The work with CBOs makes Energy Trust even more empowering. It serves more people outside the Portland area (Susan Badger-Jones).

Members shared their thoughts on the importance navigating someone through a project in a way that makes sense. The customer experience will be important for things like how they operate their homes, and how they live in their homes more efficiently with new equipment. A heat pump water heater has more settings than a conventional water heater, for example. They shared the experience of someone whose contractor had never installed a heat pump water heater. A person-centered approach will be important (Jaimes Valdez).

Staff shared additional context from the presentation to the board. Multiple agencies working together to coordinate their offers makes it much more difficult for the people working directly with customers. If each organization has incentives for heat pumps and someone needs an

electrical panel upgrade first, it becomes complicated when it comes to who handles what. Maybe there's a way that one organization pays the full incentive and obtains payment from other agencies. Flexibility in funding will vary between organizations and agencies.

Members discussed opportunities to bring together CBOs and mentioned that the Oregon Solar + Storage Conference in November and could be a good place to network and learn (Josh Peterson). Another member added that it hasn't happened yet and could be built in, but it may be a separate event. The conference is not just for installers, but also industry people (Angela Crowley-Koch).

CBOs also need to be properly staffed to best serve communities. A member shared it's a night and day difference to work with a CBO if their staff have an understanding of the industry (Indika Sugathadasa).

One member stated it would be helpful to have a very quick overview of what "other people's money" looks like, where the funding is coming from and branching out to. Oregon Department of Energy has this information (Kari Greer). Staff responded that the budget assumptions section of the budget memo provides a table summarizing that information.

Next Steps

Budget public comments are due by October 18. Advisory council comments will be incorporated or addressed also. The Oregon Public Utility Commission public meeting will be November 2. The final proposed budget will be posted on December 6. The Energy Trust board will decide on the final proposed version on December 15. If there are any changes, they will be shared with the advisory councils.

3. Public Comment

There was no additional public comment.

4. Adjournment

The meeting adjourned at 2:50 p.m.