

## Conservation Advisory Council Meeting Notes

April 10, 2024

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### Attending from the council:

Laney Ralph, NW Natural  
Corinne Olson, AWEC  
Noemi Ortiz, Cascade Natural Gas  
Lisa McGarity, Avista  
Jonathon Belmont, Bonneville Power  
Administration  
Charity Fain, Community Energy Project  
Peter Kernan, Oregon Public Utility  
Commission

Andy Cameron, Oregon Department of  
Energy  
Becky Walker, Northwest Energy Efficiency  
Alliance  
Jake Wise, Portland General Electric  
Kari Greer, Pacific Power

### Attending from Energy Trust:

Hannah Cruz  
Alex Novie  
Tom Beverly  
Elaine Dado  
Janelle St. Pierre  
Elizabeth Fox  
Jeni Hall  
Cameron Starr  
Chris Lyons  
Debbie Menashe  
Abi Sloan  
Elaine Prause  
Kirstin Pinit  
Scott Leonard  
Maddie Norman  
Thad Roth  
Fred Gordon  
Cory Hertog  
Marshall Johnson  
Natalia Ojeda  
Themba Mutepfa

Jackie Goss  
Maddy Otto  
Spencer Moersfelder  
Oliver Kesting  
Julianne Thacher  
Amanda Thompson  
Michael Hoch  
Sue Fletcher  
Kathleen Belkhat  
Greg Stokes  
Amanda Zuniga  
Laura Schaefer  
Patrick Urain  
Amber Cole  
Andrew Shepard  
Willa Perlman  
Michael Colgrove  
Tiffany Hatteberg

### Others attending:

John Molnar, Rogers Machinery  
Candice Norton, Resource Innovations  
Jenny Sorich, CLEAResult  
Brooke Landon, CLEAResult

Kris Grube, City of Portland  
Zac Gomez, Resource Innovations  
Heath Heiberg, TRC Companies  
Henry Lorenzen, Energy Trust board

### 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 <https://www.energytrust.org/wp-content/uploads/2023/11/CAC-Packet-April-2024.pdf>

She then introduced Janelle St. Pierre, senior project manager for Energy Trust's communities and new initiatives sector, who will take over as council facilitator starting in June. Hannah also introduced new

council members: Corinne Olson, who takes over for Tyler Pepple representing Alliance of Western Energy Consumers, and Peter Kernan, who represents the Oregon Public Utility Commission.

Hannah Cruz noted an opportunity to give feedback and public comment on Energy Trust's 2023 Annual Report. The OPUC directed Energy Trust to gather feedback on what is include in the report, and staff will use any feedback as inputs into the 2024 report. More information is available at [www.energytrust.org/reports](http://www.energytrust.org/reports).

## **2. Revisions to Energy Trust's grant agreement**

### *Topic summary*

The OPUC is modernizing its grant agreement with Energy Trust, through which Energy Trust receives and is held accountable for investment of ratepayer funds in cost-effective energy efficiency, small-scale renewable energy and market transformation. The update will occur within OPUC docket UM 1158.

Debbie Menashe, Energy Trust general counsel, provided an overview of the OPUC schedule and process. Many things have changed since the grant agreement was enacted. Energy Trust has been working closely with OPUC staff on the public process of revising the grant agreement. The draft agreement will be open for public comment April 26 to May 10. Commissioners will review the updated document starting in July. Council members are invited to monitor the schedule and engage in the process.

The OPUC has already talked with several utilities and stakeholders and welcomes additional direct conversations. Peter Kernan will be the OPUC point of contact for input and discussions.

### *Discussion*

None.

### *Next steps*

Staff will share materials for public comment when posted by the OPUC later in April.

## **3. 2025-2030 Strategic Plan development**

### *Topic summary*

Greg Stokes, organizational development manager, provided an update on the Energy Trust board's recent 2025-2030 Strategic Plan development workshop and discussed next steps in the process. Council members who attended the workshop were encouraged to share their thoughts.

### *Discussion*

The council stated it was a great experience overall, with good prompts to get everyone thinking and expressed appreciation for the opportunity to contribute (Andy Cameron, Jake Wise and Lisa McGarity). It said the face-to-face conversations were very helpful due to the complexity and nature of issues being faced and it was clear that staff weren't just checking boxes in a process, but instead truly considered the feedback (Jake Wise). The council pointed out it was a great development opportunity for anyone who hasn't been involved in a planning activity of this sort (Lisa McGarity).

### *Next steps*

Updates will be brought to future council meetings. The next board engagement on the strategic plan is at the board's May 13-14 meeting.

## **4. Legislative update**

### *Topic summary*

Chris Lyons and Natalia Ojeda from Energy Trust's policy services team gave a summary of energy-related bills that passed in Oregon's 2024 legislative session:

- SB 1525, which revises some ODOE programs
- SB 1530, which funded existing programs, including Oregon Health Authority Healthy Homes program and ODOE Rental Home Heat Pump program
- SB 4015, which creates a siting pathway for standalone, large-scale battery storage systems
- HB 4080, which establishes a state policy on offshore wind
- SB 1581, which requires Portland General Electric and Pacific Power to report on any activities taken toward participation in a regional energy market

Housing was one of the top issues in the session. The housing package (SB 1537, SB 1530 and HB 4134) commits \$376 million to address homelessness and support housing development. Emerging themes for Oregon's 2025 legislative session include a state transportation package, renewable energy and transmission siting, and state greenhouse gas emissions targets.

The following relevant bills passed in Washington's 2024 legislative session:

- HB 1589, which allows the Washington Utilities and Transportation Commission to implement consolidated planning for "large combination utilities" (gas and electric), which applies only to Puget Sound Energy
- HB 1185, which restricts the sale of mercury-containing lights starting in January 2029
- SB 6058, which allows the Washington Department of Ecology to link the state's carbon market with California's and Quebec's market

#### *Discussion*

None.

#### *Next steps*

None.

## **5. Residential program delivery pilots**

### *Topic summary*

Scott Leonard, Residential program manager, provided an overview of how Energy Trust is progressing through active program delivery pilots, which are used to test new delivery strategies and models. (See [CAC agenda and presentations](#) for details.) Energy Trust has learned community-based organization (CBO) partners are a viable pathway to reach energy burdened customers. Cost is a key barrier and offers must be made at no cost to the customer. There is considerable demand. Complementary funding is on the horizon via Inflation Reduction Act programs, ODOE community heat pumps, Portland Clean Energy Community Benefits Fund (PCEF), Oregon Health Authority's Healthy Homes and potential outcomes from an OPUC process (docket UM 2211).

Staff is also looking at in-home energy services. Complementary funding will be needed to support it and expand into other areas. This delivery pilot will test whether infrastructure and capacity are available to offer in-home energy services to customers.

### *Discussion*

The council asked how complementary funding offsets costs, such as through incentives or removing other barriers (Jake Wise). Staff responded that complementary funding helps fund technologies that are not cost-effective and helps with critical home repairs that are barriers to energy efficiency. Other sources of funding can help cover those costs that Energy Trust can't.

The council asked if income eligibility criteria are the same as for Savings Within Reach and if Savings Within Reach will continue (Lisa McGarity). The requirements are 60% of state median income, and Savings Within Reach will continue. Staff noted there could be a space where in-home energy services come in. No-cost offers are limited to customers experiencing low income. There could be a future

where in-home services support moderate-income customers, and specific incomes need to be evaluated over the next few months.

The council asked if Energy Trust has any intention of looking at other potential issues that arise because of equipment installed in customer homes (Jon Belmont). Staff explained there are contractor, CBO and customer surveys to determine potential challenges the process may have.

The council pointed out many customers who are energy burdened will still keep their thermostats turned down after completing work and that it should be taken into account with evaluations. There may not be a huge reduction in energy use, and a normal, baseline house might need to be considered (Lisa McGarity).

The council noted the in-home energy services pilot very closely follows what Community Energy Project offers, including an identical name (Charity Fain).

*Next steps*

None.

## **6. Existing Buildings program updates**

*Topic summary*

Patrick Urain, senior Existing Buildings program manager, reviewed adjustments made to the small business offering to increase participation, including changes to the Trade Ally Network and application process.

*Discussion*

The council asked if Energy Trust is looking at other pathways for participation, like community-based organizations or customers who do their own journey (Lisa McGarity). Staff replied Energy Trust is looking at everything within the capacity of the contractor and Energy Trust to prioritize what can be tackled, adding that there is room for expansion, and it's up to the program to determine ways to find and engage customers.

*Next steps*

None.

## **7. Multifamily workshop expansion**

*Topic summary*

Kathleen Belkhat, commercial program manager, discussed plans to expand affordable multifamily strategic energy management (SEM) workshops. Energy Trust initially worked with Community Energy Project to deliver renter workshops, then rolled out an SEM offer for affordable multifamily. Energy Trust released requests for proposals and qualifications for curriculum and delivery in 2023 to expand education across the state. There is room for additional community-based organizations and small businesses around the state to facilitate these workshops.

*Discussion*

The council asked how Energy Trust envisions working with community action agencies and community-based organizations as this expands, adding these organizations offer the same type of education with the same qualifiers for participation (Lisa McGarity). Staff responded Energy Trust will work with them to deliver and more outreach will be necessary to ensure coordination.

The council noted Community Energy Project previously ran the same program statewide (Charity Fain).

The council noted community partners sometimes do outreach, workshops, education or installation with Energy Trust, and may even play multiple roles. With program delivery pilots, program management contractors are also involved. It would be helpful to understand the various pathways for participation. UM 2211 is an opportunity to take inventory of the dollars going especially to low-income customers and how they are delivered in partnership with state agencies (Jake Wise). Staff replied this will be brought forward to Energy Trust's leadership team, adding there was a questionnaire related to this topic with UM 2211.

*Next steps*

Staff will follow-up on the various approaches Energy Trust uses to serve customers with low incomes and discuss feedback that program approaches replicate Community Energy Project programs.

**8. Council member announcements**

Becky Walker, NW Energy Efficiency Alliance, announced that the [Residential Building Stock Assessment](#) was just released on April 8. NEEA will host a workshop for people to learn more about it.

**9. Public comment**

There was no public comment.

**10. Adjournment**

The meeting was adjourned at 3:30 p.m. The next meeting will be held June 5, 2024.