

# Conservation Advisory Council Agenda

## Virtual meeting

Wednesday, July 10, 2024

1:30 – 4:00 p.m.



Zoom meeting registration link:

<https://us06web.zoom.us/join/ztMkceGorj8qE9FIYhhuc1xNqPmE6p8pkEsW>

### 1:30 Welcome, Introductions and Community Agreements

#### 1:40 Director of Energy Programs Desk *(inform, feedback)*

Tracy Scott, director of energy programs, will provide a brief update on current program activities and announcements.

Presenter: Tracy Scott, Director of Energy Programs

#### 1:45 Residential and Small Multifamily Insulation Incentive Updates *(inform, feedback)*

Staff will provide an overview of incentives for residential single-family and small multifamily insulation projects and seek CAC feedback on proposed changes.

Presenter: Marshall Johnson, Residential Senior Program Manager

#### 2:15 Contractor Development Pathway Update *(inform)*

Staff will provide an update on efforts to develop Energy Trust's Trade Ally Network by providing additional support to contractors to develop their businesses with a focus on clean energy projects.

Presenter: Cameron Starr, Senior Customer Experience Operations Manager

### 2:40 Break

#### 2:45 Eastern Oregon Economic Summit *(inform)*

Staff will share background and key takeaways from the Eastern Oregon Economic Summit held in Hermiston, OR, on June 20-21.

Presenter: Caryn Appler, Eastern Oregon Senior Outreach Manager

#### 3:15 Landlord Provided Cooling Spaces and SB 1536 Updates *(inform)*

Energy Trust and Oregon Department of Energy (ODOE) staff will present an update on the Landlord Provided Cooling Spaces (LPCS) initiative that Energy Trust is implementing on behalf of the Oregon Department of Energy. ODOE staff will also share updates on implementation of other cooling-related programs authorized by the legislation.

Presenters: Kate Wellington, Senior Program Strategies Manager, and Andy Cameron, Energy Efficiency & Conservation Manager at Oregon Department of Energy

### 3:45 CAC Member Announcements

### 3:50 Public Comment

### 3:55 Adjourn

Meeting materials (agendas, presentations and notes) are available [online](#).

**Next CAC meeting** is Wednesday, September 11, 2024. A large portion of this meeting is dedicated to reviewing the Draft 2025-2030 Strategic Plan and gathering CAC feedback.

## Conservation Advisory Council Meeting Notes

June 5, 2024

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### Attending from the council:

Laney Ralph, NW Natural  
Corinne Olson, AWECC  
Noemi Ortiz, Cascade Natural Gas  
Lisa McGarity, Avista  
Jonathon Belmont, Bonneville Power  
Administration  
Charity Fain, Community Energy Project  
Andy Cameron, Oregon Department of  
Energy

Peter Christeleit (for Becky Walker),  
Northwest Energy Efficiency Alliance  
Jake Wise, Portland General Electric  
Kari Greer, Pacific Power  
Kerry Meade, Building Potential (formerly  
NEEC)

### Attending from Energy Trust:

Hannah Cruz  
Alex Novie  
Tom Beverly  
Elizabeth Fox  
Scott Leonard  
Alicia Moore  
Sarah Castor  
Danielle Rhodes  
Melanie Bissonnette  
Laura Schaefer  
Maddie Norman  
Debbie Menashe  
Natalia Ojeda  
Willa Perlman  
Kearstin Estrada  
Adam Shick  
Cameron Starr  
Kirstin Pinit  
Jackie Goss  
Greg Stokes  
Elaine Prause  
Isaiah Kamrar  
Spencer Moersfelder

Andi Nix  
Michael Hoch  
Marshall Johnson  
Kate Wellington  
Maddy Otto  
Thad Roth  
Ryan Crews  
Abi Sloan  
Kenji Spielman  
Julianne Thacher  
Sue Fletcher  
Emily Findley  
Dan Rubado  
Shelly Carlton  
Leila Shokat  
Lidia Garcia  
Akanksha Rawal

### Others attending:

Henry Lorenzen, Energy Trust board  
Brooke Landon, CLEAResult  
Dave Beaulieu, TRC  
Steph Berkland, TRC  
Candice Norton, Resource Innovations

Don MacOdrum, TRC  
Kheoshi Owens, Empress Rules  
Jeff Cropp, TRC

### 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-June-2024.pdf>. Hannah reminded the group that she is gradually stepping away from the CAC facilitation role. Alex Novie, Communities and New Initiatives Sector Lead,

introduced himself as co-facilitator for the June meeting. Hannah also introduced Alicia Moore, diversity, equity and inclusion (DEI) director for Energy Trust.

Hannah noted an opportunity to give feedback and public comment on Energy Trust's 2023 Annual Report. The OPUC has directed Energy Trust to gather feedback on what's included in the report, along with what additions may be helpful. 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).

Hannah also reminded CAC members of the community agreements and reiterated the importance of standing by the agreements as a framework for respectful interaction.

## **2. CAC engagement and recruiting**

### *Topic summary*

Hannah Cruz introduced Kheoshi Owens, CEO of Empress Rules Equity Consulting, and discussed the important role Kheoshi played in bringing the community agreements forward, as well as the recommendations she provided to improve diverse and inclusive membership and participation in the CAC meetings.

Empress Rules Equity Consulting works with organizations to improve inclusivity, with the goal of attempting to end dehumanization of people. Kheoshi wants to encourage welcoming environments for everyone and has worked with Energy Trust in this role since 2018. Kheoshi mentioned the inspiration her daughter provides, and her desire to make the world a better place for her daughter's generation.

The Conservation Advisory Council (CAC) and Renewable Energy Advisory Council (RAC) advise Energy Trust's board and staff on strategic matters and achieving organizational goals. The current charter, membership, recruitment and retention processes, along with meeting management techniques, present barriers to having conversations in the organizational focus areas of DEI. Advisory councils with diverse perspectives and views improve their ability to advise staff and the board in DEI areas.

Staff have worked internally, and with Kheoshi Owens, to look at recruitment and feedback practices to create inclusive spaces for all members. The recommendations report summarizes the work of CAC/RAC facilitators and presents takeaways for the board and executive team to consider.

See the [June 5 meeting packet](#) for the presentation and more details.

### *Discussion*

Kheoshi Owens pointed out that Energy Trust has made a great start and stated how pleased she is that this work is still moving forward.

Kheoshi discussed the importance of humanity training (equity training), stating that if we don't know the historical components of how we arrived at today's inequities we will continue them. CAC and staff also discussed misogynoir, a form of misogyny that keeps Black women at a lower status than men. 'Noir' adds a specific harm against black women. Lack of awareness and power dynamics both play into perpetuating it. Infrastructure needs to be rebuilt to be welcoming to women, people of color and everyone. Tools are also needed to take responsibility and hold each other accountable for actions. They don't have to be punitive – but instead can be restorative. We can't act like it's okay to speak or act in a racist way just because it has always been that way. (Kheoshi Owens)

CAC members also discussed how good it is to see the work of the foundational Diversity Advisory Council (DAC) being implemented on other councils and across the organization. It helps ensure that people who are most impacted by climate change are being better served. (Charity Fain and Alicia

Moore) CAC members also appreciated the comprehensive DEI efforts and requests for resources to carry them through. Without resources they tend to be minimized or ignored. (Peter Christeleit)

#### *Next steps*

Staff will continue the discussion internally, and bring additional updates to CAC as they are available.

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

#### *Topic summary*

Greg Stokes, organizational development manager, provided an update on plan development. The board is close to finishing the remaining strategic plan components. A draft will be published by mid-August and open for comment through about mid-September.

The [CAC meeting packet](#) includes the presentation with details about progress and upcoming steps. The vision, purpose and unique role of value statements are unlikely to change by the time the draft is released. Other main elements of the strategic plan (ie. Focus Areas, Outcomes and Goals) are still under discussion.

#### *Discussion*

CAC members stated that the conversations were well orchestrated and expressed appreciation for the diversity of thought included in developing the statements. (Jake Wise)

#### *Next steps*

CAC will be re-engaged in more detail during the CAC meeting on September 11. By this time the draft 2025-2030 strategic plan will be published and open for public comment. Materials will be sent in advance.

### **4. UM 1158: Revision of Grant Agreement**

#### *Topic summary*

Debbie Menashe, general counsel, provided an update on the process to update Energy Trust's grant agreement. The agreement is being updated to reflect changes in statute based on HB 3141 (2021) and bring it up to date. The agreement hasn't been updated since 2005. UM 1158 is the published docket number at the OPUC. The recommendation from OPUC staff will go to the commissioners at their July 9 meeting.

The OPUC received seven public comments by the May 30 deadline. There was a range of suggestions, including both high level and detailed references to adding equity objectives into the body of the agreement, along with accountability for meeting the objectives. There were also comments on termination provisions. The agreement has an initial date of 2030 with automatic renewals up to 2035. There were comments about making these more specific. The sunset date that was lifted by HB 3141 may be reflected in the updated agreement. OPUC staff are reviewing comments, then will engage with us on possible responses. Alicia Moore, Energy Trust DEI director, will join the discussion due to the equity recommendations.

Documents are available on the OPUC website.

#### *Discussion*

CAC asked how equity measures changing over time will be addressed in the updated grant agreement. (Lisa McGarity) Staff responded that the draft agreement has equity objectives that are different from Energy Trust's annual performance measures to the OPUC. The objectives are at a slightly higher level and have very specific measurable outcomes Energy Trust would be compared against. (Debbie Menashe)

#### *Next steps*

No additional steps were discussed.

## 5. Multiyear planning update

### *Topic summary*

Melanie Bissonnette gave an update on multiyear planning efforts, explaining that Energy Trust hasn't planned on a multiyear time horizon in the past, so we have been looking ways to set longer-term savings targets and documenting new processes to develop a multiyear plan. As part of the Multiyear Plan Process Design project, Energy Trust focused on developing process and plan management documents, outlining information and data needs, and creating a stakeholder engagement plan.

Multiyear planning work will pause in June and begin again in January 2025. Energy Trust's Multiyear Plan will include five-year business, human resource, and financial plans as well as a supplemental funding strategy. Advisory council members will be engaged at three primary points in the process: a January kickoff with timelines and a review of focus areas and outcomes, workshops in March or April, and review of a draft plan in July, which will also kickoff the public comment period. The full board, the board finance and audit committee, OPUC, utilities and other industry and environmental justice stakeholders will be included in the workshops.

The current process is an annual budget with a second-year forecast. All other plans are made based on that timeline. It runs every year from spring to fall with many stops at advisory councils and for public comment. Planning on an annual basis is becoming more challenging and staff are not focused or thinking long term to meet the many statewide goals, including the decarbonization goals in HB 2021 (2021). This is a new skill for Energy Trust to learn. It will shift how we engage CAC and stakeholders. There will be one more big engagement and input push with CAC and stakeholders in 2025, then the planning workload will drop off to some extent.

Staff will think about how often advisory councils get updates on progress. It's an open question, but it will be different in plan management years vs. plan development. Staff expressed a need and appreciation for utility and OPUC input as Energy Trust makes the shift to multiyear planning. (Alex Novie)

### *Discussion*

None.

### *Next steps*

No additional steps were discussed.

## 6. New Homes Impact Evaluation Next Steps

### *Topic summary*

Scott Leonard and Dan Rubado provided a recap of the evaluation recommendations, background and direction Energy Trust will go, based on the recommendations. Scott thanked Apex Analytics, who conducted the evaluation, along with Dan Rubado and TRC, the program management contractor.

Scott explained that EPS New Construction uses code as a baseline, and works with builders to go beyond code. Incentives are based on how far homes go beyond energy code. The current estimation is that the average EPS home is designed to be over 20% more efficient than a typical newly built home. Homes must be at least 10% better than code to receive Energy Trust incentives.

Energy Trust evaluates programs regularly to compare estimated and actual energy savings, called an impact evaluation. The 2022 evaluation showed that EPS homes used more energy than estimated. They still saved energy over code homes, but not by as much as expected. Energy use of homes not participating in the program was variable, which made it difficult to do comparisons of participating

homes to non-participating homes. Energy models may have miscalculated, data input errors could have contributed and reference homes that were minimally compliant may also have contributed. There may have been impact on non-program homes, as builders indicated that they follow many of the same practices on participating and non-participating homes.

Multiple recommendations are proposed to improve savings of participating homes. They are summarized in the [presentation](#). The next steps include finalizing code reference homes, finalizing the 2012 – 2019 impact evaluation response, modeling above-code home scenarios, collecting installed costs for above-code measures, and determining 2025 program incentives, along with finalizing the measure approval document.

#### *Discussion*

CAC asked what kind of monitoring will be done to prevent this from continuing for another two or three years, adding that a quicker turnaround is needed in deciding on continuing the program vs. another overhaul. (Lisa McGarity). CAC also asked if Energy Trust anticipates lowering minimal participation from 10% to 5% better than code. (Jonathon Belmont). Staff responded that Energy Trust will have quicker turnaround on billing analysis in 2024 and 2025, once there are homes completed under the new code. This will help track how they perform under the new changes. There will also be more frequent analysis. (Dan Rubado) Staff also added that more time will be needed to monitor and do the analysis and explained that the bar for entry may be a little lower than previously. (Scott Leonard)

#### *Next steps*

This information will be presented to the board on June 13, then to home verifiers. We will return to CAC as additional details are developed.

#### **7. Council member announcements**

There were no announcements.

#### **8. Public comment**

There was no public comment.

#### **9. Adjournment**

The meeting was adjourned at 3:45 p.m. The next meeting will be held July 10, 2024.





# Conservation Advisory Council's Community Agreements



# Why We Use Community Agreements

- At Energy Trust, we are improving how we listen to, serve and provide incentives and benefits to customers we have not centered in the past, including
  - People who identify as Black, Indigenous and People of Color
  - People with low and moderate incomes
  - People living and working in rural areas
- We will be adding more customer and community perspectives to CAC that can elevate the experiences of these customers. With more cross-cultural differences, there is more room for miscommunication, disagreement and even harm



# Purpose

- Community agreements
  - Are created collectively
  - Describe how members of a group will act, behave and work together
  - Are an accountability framework to support members, especially groups with diverse and varying perspectives, lived experiences and professional backgrounds
  - **At their core – *they set the tone for the experience of being on the CAC, including communicating and participating in meetings***
  - **They are also a tool for the facilitator and members to use to address misunderstandings and harm when it occurs**

# Our 2023 Community Agreements

## We will

- Stay engaged
- Share the stage / step up, step back
- Listen to each other to learn and understand
- Assume best intent and attend to impact
- Address actions that marginalize or harm another person or group of people

# These Community Agreements Will Help Us in Forming A Council Where There Is

- ❑ Trust

- ❑ Healthy conflict

- ❑ Respect for a variety of experiences and backgrounds

- ❑ Engagement

- ❑ Support for one another

- ❑ Participation, in different ways, inside/outside meeting

## We Will:

- Use the community agreements in each CAC gathering
- Hold each other accountable when the agreements are not followed
- Revisit the community agreements annually or more often/as needed





# 2024-2025 Residential Insulation Incentive Changes

July 10, 2024

# Agenda

- Background on insulation offers
- Current insulation measure offers
- Proposed changes to insulation offers
- Discussion

# Background on Residential Insulation Offers

**2007 – 2013:** High investments in whole-home approach

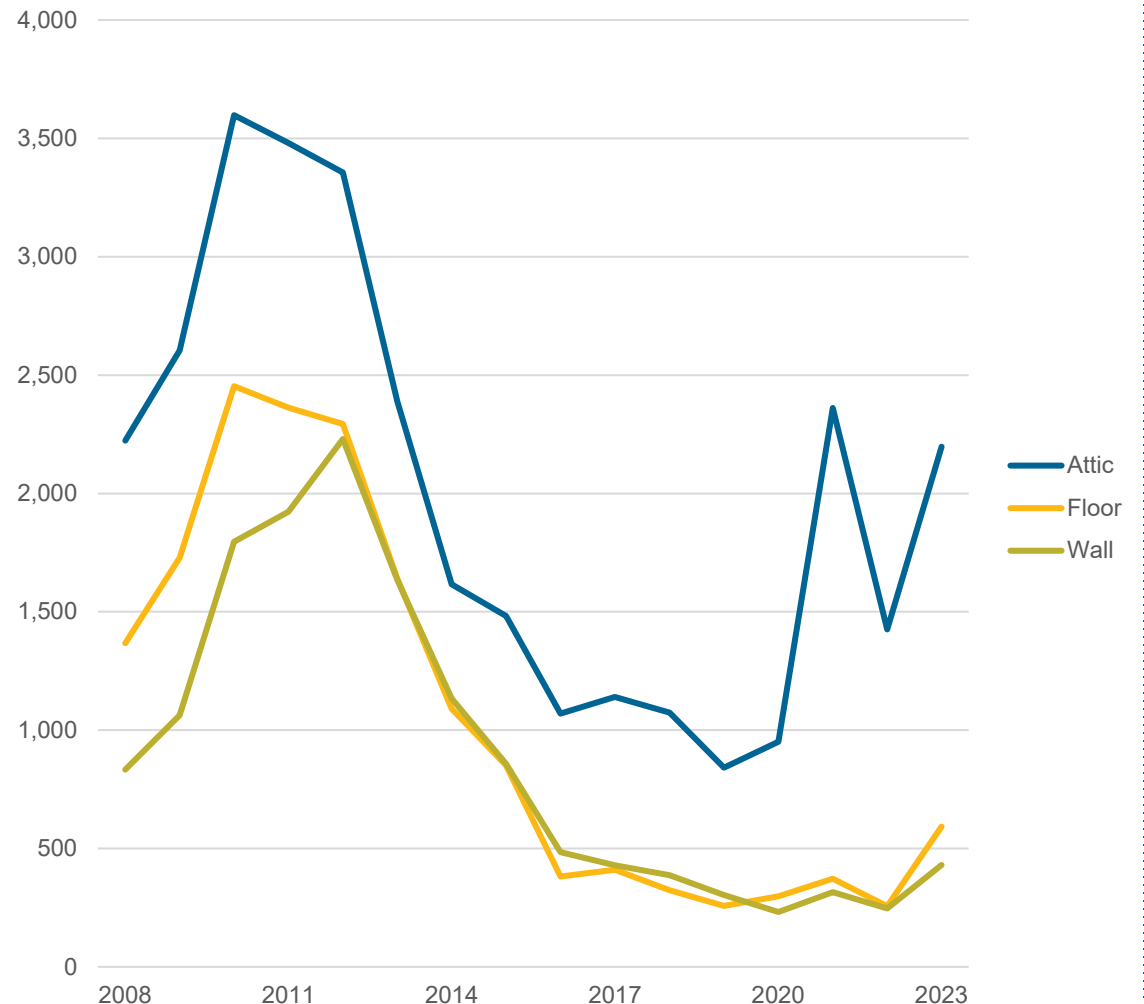
**2014:** New insulation incentive cap introduced due to decline in natural gas avoided costs, leading to decrease in whole-home improvements

**2020:** Bonus to attic insulation caused a spike in activity

**2022:** Order 22-482 published, including:

- TRC exception for select insulation measures for 5 years
- UCT exception up to 0.8 for 5 years for income-qualified & energy burdened households
- Recommendation for Energy Trust staff to work with CAC to adjust or develop new offers with UCT exceptions

Historical Residential Insulation Project Volume







## Goals of proposed incentive increases

- Increase gas & electric savings while maintaining parity in the incentive levels across fuel type
- Increase support of priority customers, as emphasized in the revised insulation measure analysis and UCT exception
- Encourage increased adoption of wall & floor insulation alongside attic insulation for improved whole-home efficiency
- Increase trade ally engagement, especially in SWR and single-family rental offers



# Current Residential Insulation Offers

Incentives are offered at three levels:

- Standard
- Savings Within Reach (SWR), Rentals
- Community Partner Funding

- Standard, SWR, and Rental incentives are delivered by Trade Allies.
- CPF Incentives are delivered by CBOs

	Standard Incentive	SWR & Rental Incentive	Community Partner Funding Incentive
Attic	\$1.25	\$1.50	Up to \$3.00
Wall	\$0.50	\$0.75	Up to \$2.20
Floor	\$0.50	\$0.75	Up to \$3.65

**Low project volume and low coverage of project cost for some insulation types creates an opportunity to increase project volume & insulation savings** through increased incentives, as well as increase support of priority customers:

	Total 2024 Projects (Forecasted)	Average Project Cost (Standard)	Average Incentive Coverage of Project Cost (Standard)	Average Project Cost (SWR, Rentals)	Average Incentive Coverage of Project Cost (SWR, Rentals)
Attic	3,020	\$3,100	51%	\$2,300	75%
Wall	560	\$3,400	12%	\$2,100	25%
Floor	990	\$3,300	18%	\$3,200	28%

# Proposed Incentive Changes

**Proposed increases** for standard incentives:

	Current Standard Incentive	Current Coverage of Project Cost	Proposed Standard Incentive	Coverage of Project Cost with Proposed Incentive
Attic	\$1.25	51%	\$1.25	51%
Wall	\$0.50	12%	<b>\$1.50</b>	<b>36%</b>
Floor	\$0.50	18%	<b>\$0.75</b>	<b>27%</b>

**Proposed increases** for priority customers:

	Current SWR & Rental Incentive	Current Coverage of Project Cost	Proposed SWR & Rental Incentive	Coverage of Project Cost with Proposed Incentives
Attic	\$1.50	75%	\$1.50	75%
Wall	\$0.75	25%	<b>\$2.25</b>	<b>77%</b>
Floor	\$0.75	28%	<b>\$1.00 (\$1.25 MH)</b>	<b>39%</b>

# Impacts of Proposed Incentives

## Savings

- ~130,000 kWh, ~20,000 therms projected savings from all proposed increases through 2025

## Projects

- Forecasting 400-600 additional projects in 2025

## Budget

- Limited portfolio budget impact on 2024 spending
- Increases are not projected to cause the incentive budget to exceed the 5% of program incentives as a condition of the cost-effectiveness exception

## Timeline

- Increases could be implemented at the beginning of the heating season (fall 2024)
- Plan to reevaluate incentive levels at the end of 2025 to assess interaction with IRA funding

## Discussion Questions for CAC

Do you support these incentive increases?

We would like your input around how we might:

- Increase support of priority customers benefitting from insulation improvements?
- Encourage increased adoption of wall & floor insulation alongside attic insulation for improved whole-home efficiency?
- Increase trade ally engagement, especially in SWR and offers benefiting renters?





# Thank you

Marshall Johnson

[Marshall.johnson@energytrust.org](mailto:Marshall.johnson@energytrust.org)



# Contractor Development Pathway Update

## Conservation Advisory Council

7/10/2024



# The CDP Team



Savannah Lee  
(she/her)



Heath Heiberg  
(he/him)



Jaime Alcala  
(he/him)



**ELEVATE**  
Equity through climate action



Juan Pablo Torres-Meza  
(he/him)



**ELEVATE**  
Equity through climate action



Melissa Robson  
(she/her)



**ELEVATE**  
Equity through climate action

## CDP Vision and Mission

*We **envision** a future where all Oregonians have equitable access within their communities to thriving contractor businesses that provide energy efficiency and renewable energy.*

*Our **mission** is to support sustainable business growth in the energy efficiency industry and increase access to Energy Trust programs for Black, Indigenous, Latino/a/e, People of Color, and women business owners, and business owners in rural areas, who have been overlooked historically by Energy Trust.*



# CDP: How does the pathway work?



Submit an application

Cohort of 10-15 contractors

Feb-March



Create an action plan customized for your business

April-May



Attend training workshops and individual business development services

April-October



Be matched with a mentor and attend recurring mentorship meetings

June-November



Receive Trade Ally support for energy efficiency projects

Ongoing

# What are the benefits to participants?



## **Increase Knowledge**

Attend training workshops to expand your knowledge of the energy efficiency industry, utility programs, and more.



## **Peer Mentorship**

Partner with experienced professionals to grow your business with energy efficiency.



## **Network of Support**

Grow your network while completing your action plan alongside cohort colleagues and community partners.



## **Business Development Services**

Receive individual business services to grow your business sustainably.

# What does a participant learn?



## Group Workshop Topics

- Utility programs
- Energy efficiency economy
- Completing Energy Trust projects
- Bidding and estimating



## Business Development Services

- Financial consulting
- Marketing
- Business planning
- COBID certification



## Peer Mentorship

- Networking
- Knowledge share
- Industry best practices
- Business development



## Library of Resources

- Trade-specific content
- Workshop presentations
- Mentorship content
- Additional small business resources

# About Peer Mentorship

## Key Objectives

- Strengthen trade ally support for minority and women-owned contractors
- Foster trade ally connections
- Support knowledge transfer of business and industry insights
- Provide mentees with the tools and understanding they need to grow and develop their businesses.

## Why Mentorship?

- Shortens learning curve
- Develops a professional network
- Helps mentee reach high level of preparedness

**“70% of mentored small businesses survive 5+ years, doubling the rate of unmentored ones.”**

# Matching

Skillset Compatibility



Mentee Preferences



Personality Compatibility



Demographic Variables; DEI Responses



# Mentoring Session Topics

## Estimating and Bidding

- Strategies and Best Practices
- Helpful Resources
- Cost Estimation and Bidding Strategy Worksheets

## Long-Term Planning and Forecasting

- Determine current and future goals
- Business growth and management basics
- Long Term Planning Worksheet

## Marketing and Branding

- Identifying your brand
- Marketing plan
- Marketing Plan and Brand Development worksheets

## Attracting and Hiring Talent

- Identify hiring needs
- Define essential skillsets required for your business
- When to Hire worksheet

## SWOT Analysis

- Identify where your business stands
- Assess opportunities of success and improvement
- Create an Action Plan

## Networking: Making Connections

- Best practices and successful networking tips
- Trade Organization associations and benefits
- Networking Goals worksheet

# Business Development Fund

**Provides reimbursement for eligible items to support your business.**

- Annual maximum: \$4,000
- Minimum reimbursement: \$75
- Reimbursements processed within 60 business days



Visit the [Insider](#) to learn more and connect with your Trade Ally Coordinator to apply for Business Development Funds.



Marketing



Technology



Tools



Business Support



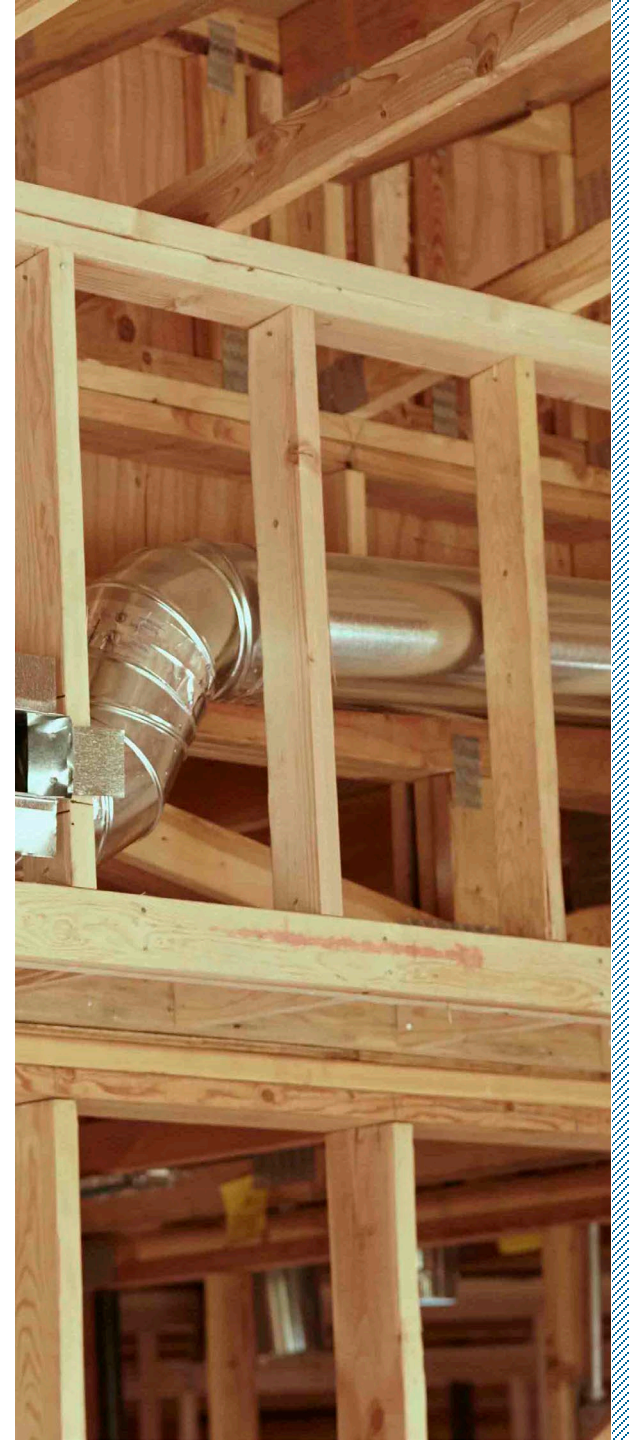
And More!

# Small Business Trade Ally Resource Network



# What's next?

- Present through 2024
  - Existing Buildings is launching our third cohort
  - 16 applicants – the largest we have ever had
  - Developing workforce development strategy to support worker pipelines
  - Residential developing CDP program to expand our offerings
- 2025
  - Launch a unified residential and commercial CDP cohort
  - Add additional offers to our Small Business Trade Ally Resource Network







Thank you

Any questions?

Cameron Starr, Sr. Customer Experience Operations  
Manager

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# 2024 Eastern Oregon Economic Summit

## CAC background and recap

July 10

# Agenda

- Background on Eastern Oregon Women's Coalition
- Purpose of Economic Summit
- Energy Trust involvement
- 2024 agenda and attendance
- Key takeaways





## Eastern Oregon Women's Coalition Background

- Founded by small group of women in Eastern Oregon to host decision makers and facilitate dialog
- Trips began with one-on-one hosting and education opportunities
- Evolved into 501(c)(3)
- Host of two events:
  - Eastern Oregon Economic Summit
  - Governor's Luncheon



## Purpose of annual summit

- 2 day event
- Tours and presentation
- Evolve state-wide understanding of challenges and opportunities in rural Oregon
- Explore areas of public and private partnership
- Network and connections for local leadership and community based organizations



# Energy Trust involvement

- Board membership
- Annual meeting planning
- Highlighting energy related topics and work that impact economic development
- Regional and state-wide resource connections





## 2024 Agenda and attendance

- Theme: Exploring Eastern Oregon's Opportunities in Energy and the Environment
- Industry Tour Highlights
  - Manufacturing
  - Agri-producers
  - Affordable housing
  - Workforce
  - Large scale hydropower
  - Cogen
  - Utility-scale wind + solar + battery



# 2024 Key topics and takeaways

- Partners addressing residential energy burden
- Innovative technologies to support sustainable & resilient food systems
- Transportation, electrification and climate resilient infrastructure
- Climate change and water systems
- Renewable energy and economic diversification
- Integration of traditional and indigenous knowledge with climate smart technology
- Sustainable tourism and recreation



## 2024 Key topics and takeaways

- Innovation in EE and RE is happening to help industry and ag manage costs
- Water management critical to Tribal interest in natural resources management and infrastructure related to economic development
- Funding is available but human capacity is limited to apply for, manage and deploy resources





## 2024 Key topics and takeaways

- Partnerships and fund stacking is key to closing financial gaps
- Concern around electrification and impact on transportation costs
- Approaches must be tailored
- CTE and higher ed plays role in green workforce development







# Thank you

Caryn Appler

Sr Outreach Manager – Eastern Oregon

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# Landlord Provided Cooling Space: Program Update

Conservation Advisory Council – July 10, 2024



# Agenda

- Background
- Program Overview
- Timeline + milestones
- 2-Year Highlights
- Lessons Learned
- Continuous improvements
- Additional changes
- Next steps



# Recap: SB 1536 Overview

## Community Cooling Spaces

- Grant via Oregon Department of Energy to **Energy Trust**
- \$2 million
- Support landlords in creating/operating cooling spaces for tenants

## Air Conditioner and Air Filter Deployment Program

- Administered by Oregon Health Authority
- \$5 million – likely will only be spent on air conditioners.
- Grants to eligible entities to distribute air conditioners and air filters to people eligible for medical assistance

## Heat Pump Deployment Program

- Administered by Oregon Department of Energy
- \$10 million; \$5.54 million max until 7/2023
- Grants to eligible entities to purchase/install heat pumps and related upgrades, prioritized for electric resistance or bulk fuel customers

## Residential Heat Pump Program

- Administered by Oregon Department of Energy
- \$15 million; \$6.56 million max until 7/2023
- Grants to enable heat pump installs prioritized for LMI residential MF

## Cooling Programs Awareness

- OHCS web information on cooling and related programs

## Emergency Shelters

- Administered by Department of Human Services
- \$2 million
- Grants to certain entities to establish emergency spaces for clean air, warming or cooling



# Landlord Provided Cooling Spaces Overview

## Community Cooling Spaces

- Accommodate 5 or more residents
- Maintain temperature of 80 degrees or cooler
- Operate and available to residents during extreme heat events

## What We Offer

- Technical support
- Incentives for equipment + installation
- Options for plug-in and hard-wired solutions
- Offer available state-wide (not limited to IOU territory)

## Eligible Customers

- All landlords who wish to create one or more community cooling spaces at or near their premises in Oregon
- Includes multifamily properties and manufactured home parks

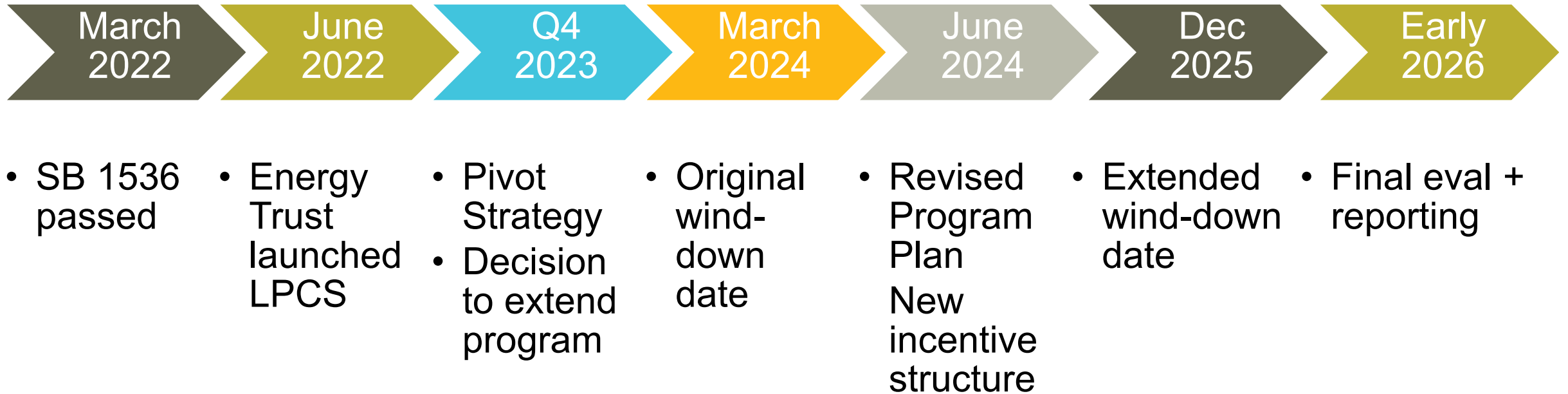
## Eligible Sites

- Multifamily rental properties or manufactured home parks with a common area that can accommodate the creation of an on-site community cooling space
- Pathway available for landlords to use off-site spaces

Priority to creating cooling spaces that serve environmental justice communities



# Timeline + Milestones



## 2-Year Highlights

### Projects Completed

- Year 1: 9
- Year 2: 31
- Total: 40

### Environmental Justice Communities

- Low-income: 35
- Senior: 14
- BIPOC: 10
- Disability: 10
- Rural: 7
- Coastal: 3

### Housing Types

- Affordable: 31
- Non-profit: 26
- Manufactured home park: 6
- Senior: 5
- Agriculture: 2

# Lessons learned

## Cost

- Tiered incentive structure: most customers who did not qualify for 100% reimbursement opted not to participate
- Up-front costs challenging, even if incentive would reimburse full cost

## Program complexity

- Qualifying for higher tier incentives could be challenging
- Larger sites: technical review
- Unique customer and site characteristics encountered

## Marketing and outreach

- Need for additional marketing tactics and budget than initially planned
- Need targeted outreach approaches to find customers + sites that fit program

## Technical requirements

- Prescribed oversizing of equipment for extreme heat events led to confusion and challenges
- Need customized solutions to optimize for year-round + extreme heat

## Spaces

- Often no spaces on-site; limited interest in off-site pathway
- Very few spaces can meet temperature needs through portable equipment alone

# Continuous improvements

## Enhanced marketing tactics

- Employed range of marketing tactics to significantly increase activity; revised website content

## Targeted outreach support

- Field staff experience & layered in data analytics over time

## Combined equipment solution

- Created option to combine hard-wired and plug-in solutions to support year-round optimized systems + supplemental cooling during extreme heat events

## Option to assign payment to Trade Ally

- Provided Trade Allies ability to offer instant discount to customers & receive incentive directly

## Streamlined exceptions

- Developed streamlined process for unique customer circumstances and site characteristics



# Further refinements

- **Effective June 1: Removing the tiered incentive structure**
  - Shifting to single incentive tier that covers up to full cost for all customers
  - Maintain focus on priority populations through targeted marketing and outreach
    - Original goal: 50% projects serving priority populations
    - To-date: 85% of projects have served priority populations
- Additional dedicated budget for enhanced marketing tactics
- Additional flexibility in equipment sizing and solutions.







# Thank you

**Kate Wellington, Sr. Program Strategies Manager**

Communities & New Initiatives

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**Themba Mutepfa, Program Manager**

Landlord Provided Cooling Spaces Initiative

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**SB 1536 Highlights:  
Cooling needs study,  
Healthy Homes, Heat  
pump reporting**

# Cooling Needs Study – Select Highlights



A DIVISION OF

**Parametrix**





## Assessed cooling needs in:

- Publicly supported multifamily housing
- Manufactured dwelling parks
- Recreational vehicles (RVs) being used as housing
- Agricultural workforce & farmworker housing

## Study Approach

Identify and consolidate all existing data and technical information.

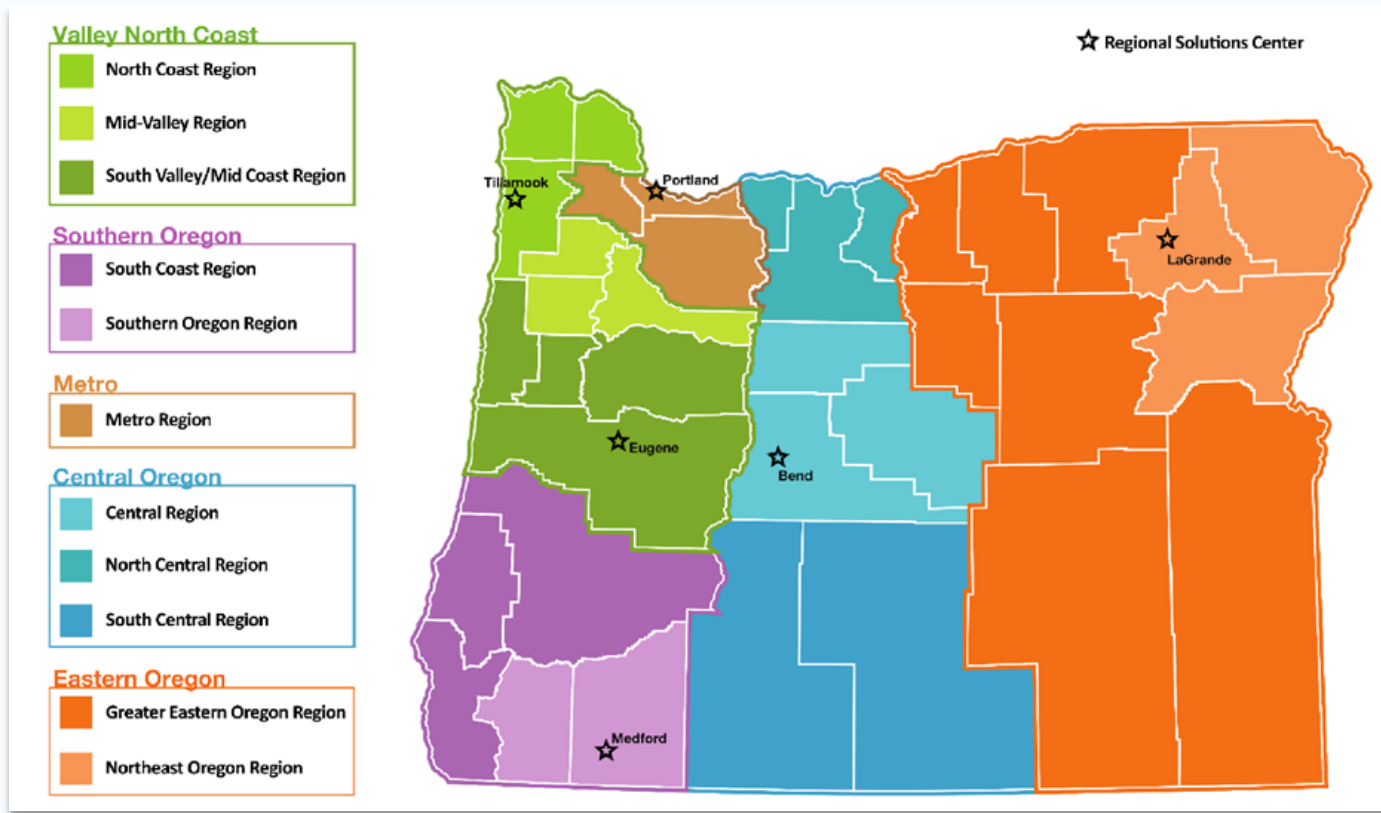
Conduct outreach to collect on-the-ground data from heat vulnerable populations in partnership with a network of Community-Based Organizations.

Compile results into final report and Heat Vulnerability Index online GIS tool.

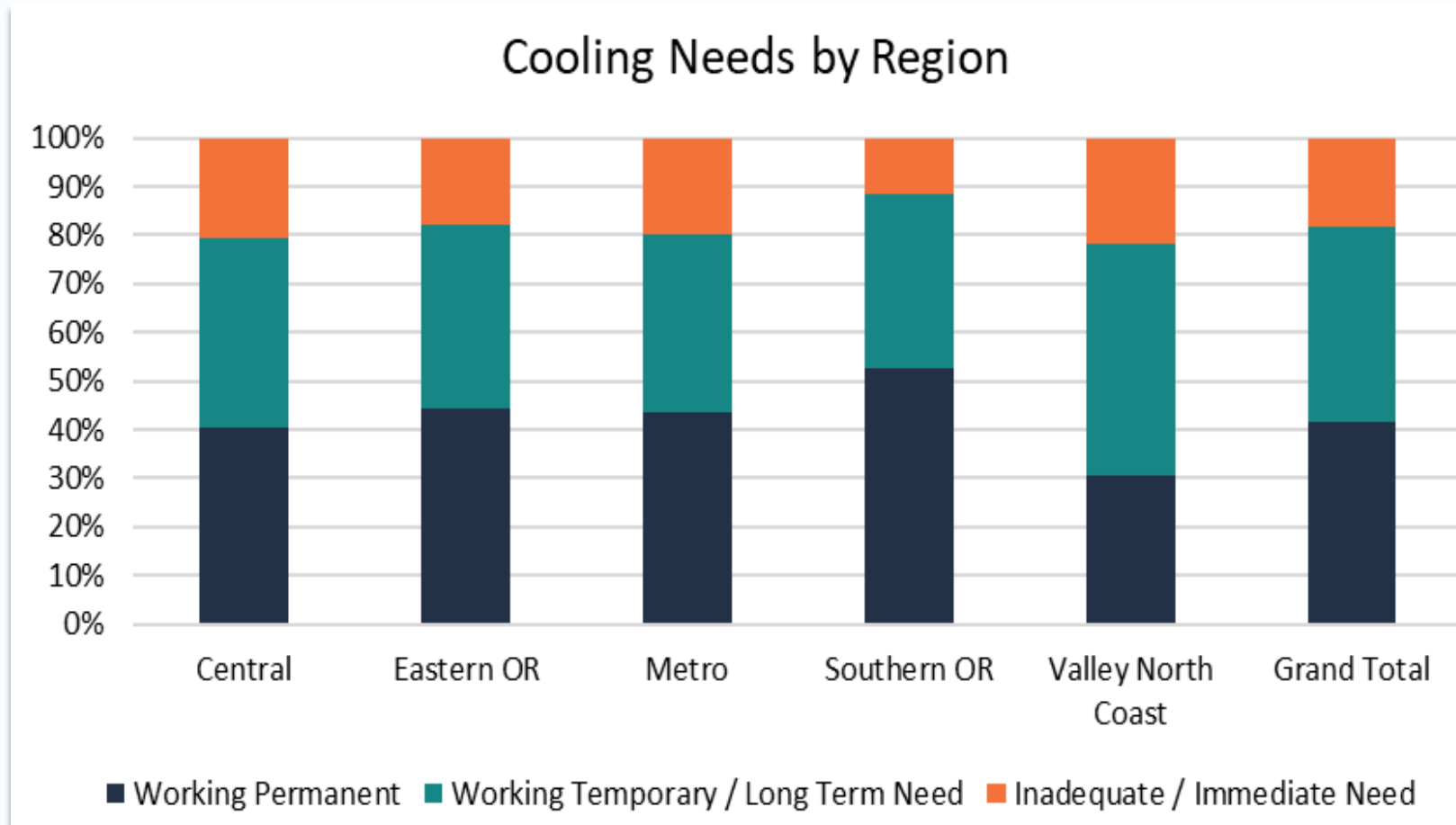


# Study findings – Regional needs

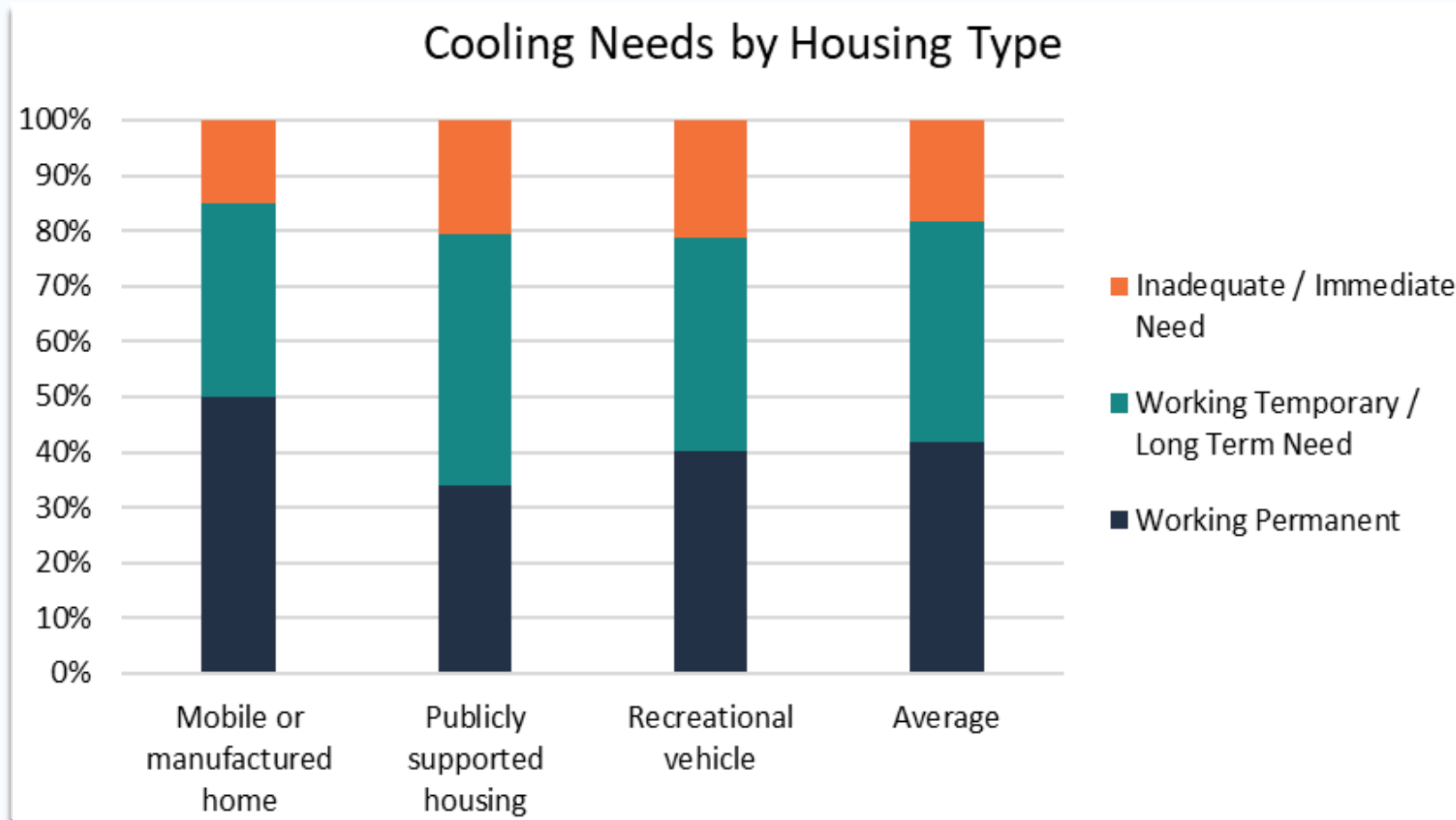
58% of survey respondents need permanent cooling. The total cost for installing the preferred cooling equipment across all housing types is estimated to be \$582,100,000 – \$1,046,200,000.



## Study findings – Regional needs



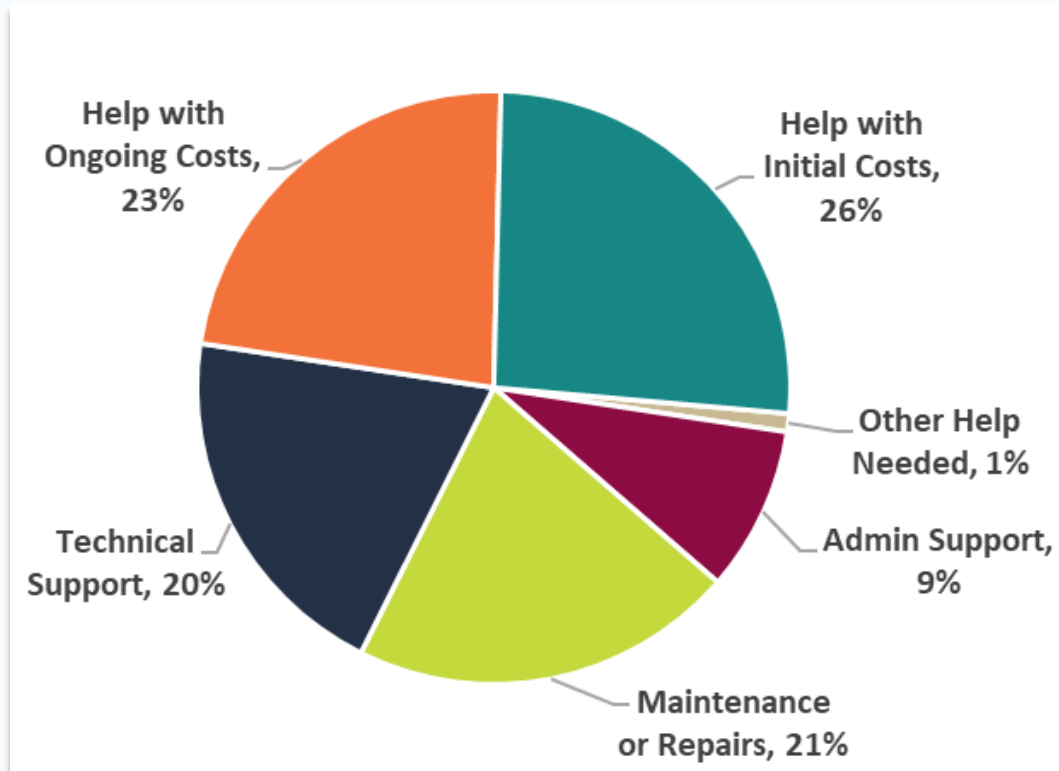
## Study findings – By housing type



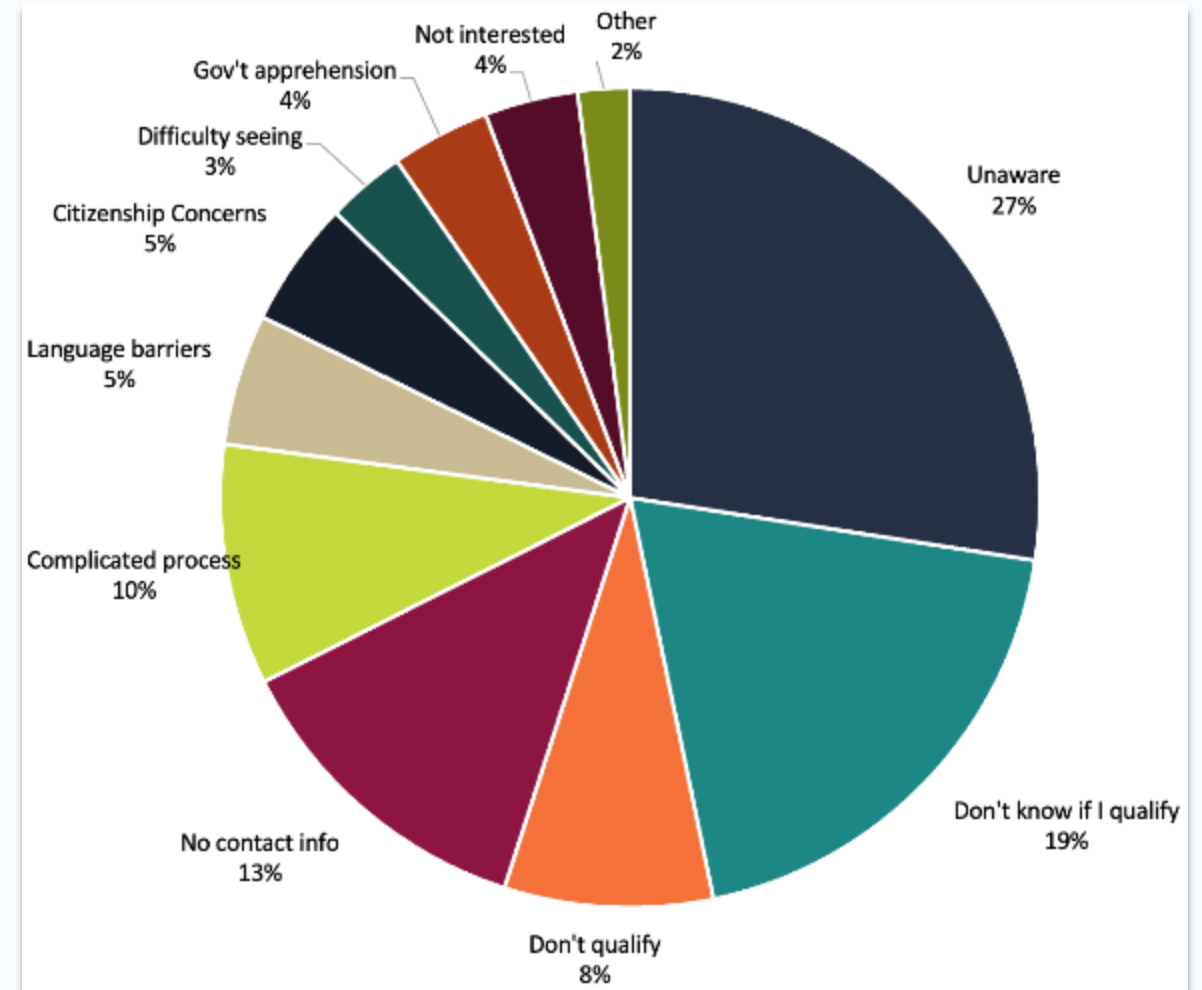


# Study findings – Social barriers

Types of support needed to upgrade cooling



Reasons for not using assistance programs



# **Healthy Homes Grant Program (OHA)– Program Highlights**

# HHGP Background

*HHGP provides “grants to **eligible entities** that provide financial assistance to persons in **low-income households** to **repair and rehabilitate** their residences and to landlords to repair and rehabilitate dwelling units inhabited by low-income households.”*

*- (Oregon [HB 2842](#), 2021; additions made with [SB 1536](#), 2022)*



# HHGP Eligible Entities

- Local governments
- Local housing authorities
- Nonprofit organizations
- Federally recognized Indian tribes in Oregon
- Indian health centers
- Coordinated Care Organizations
- Community Action Agencies
- Manufactured dwelling park nonprofit cooperatives
- Electric (company) utilities
- Natural gas utilities

# HHGP Eligible Actions

- Maximize **energy efficiency** of residences
- Extend the **usable life** of residences
- Improve the **health and safety** of the occupants of residences including radon abatement, lead abatement, mold and mildew abatement, safety improvements, etc.

# HHGP Round 1 Funding – Request for Grant Applications

- **OHA currently finalizing awards.**
- OHA-HHGP planning to fund approximately 30 awards ranging between \$25,000-\$750,000.
  - Large and Medium tracks
- Awards are for a 3-year period.
- A \$3 million Tribal Set Aside for the 9 Federally Recognized Tribes in Oregon is currently being negotiated.
- Applications currently being reviewed.
- Successful awardees will be posted on [HHGP website](#) after grant agreements negotiated.

## Heat Pump Reporting – Progress Highlights

*The goal of the heat pump report is to capture the biggest slice of available heat pump data. It will aim to accomplish this by identifying the largest stakeholders in heat pump technology installations and incorporating their data, and experience.*



ODOE directed to track and report on state heat pump goals.  
ODOE is early in the process, but key programmatic aspects are below:

- 58 data sources...and counting!
- Unknown industry buy-in/opinion
- What are long-term costs of maintenance/repair?
- Collection methodology: direct, survey, webform, ???
- Possible skills gap; studies show correlation of EE and install skill. HP efforts closely tied with workforce-focused staff.

Questions? Comments?

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