



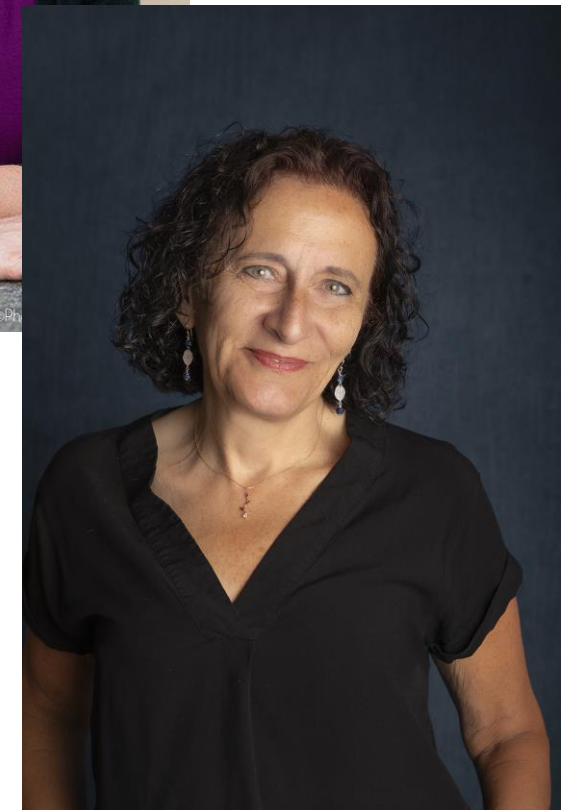
Industry and Agriculture Stakeholder Workshop: Input on 2026-2030 Program Activities

February 27, 2025

Language interpretation: Spanish

Good morning! Please choose a language by clicking on the globe icon that says "Interpretation" on the bottom of the screen or in the "More" menu (could appear as three little dots). It is important that **EVERYONE** choose a language so that all may hear and participate. Thank you!

¡Buenos días! Por favor, elija un idioma para la presentación haciendo clic en el ícono del mundo que dice «Interpretation/Interpretación», o en el menú de «More/Más» (puede aparecer como tres puntitos) para aparatos móviles. Es importante que **TODOS** seleccionen un idioma para que todos puedan escuchar y participar. ¡Gracias!



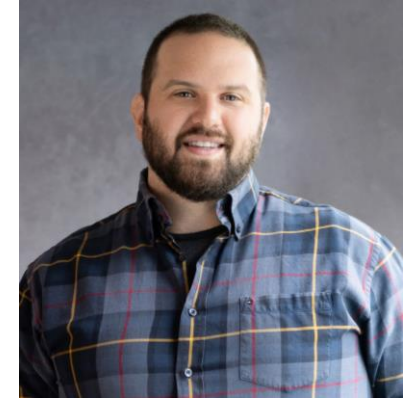
About our facilitator: Catalysis LLC

- Our role is to serve as holders of the space, allowing folks to contribute as best as you are able
- We ask for your permission to pause a comment or discussion to allow for the full group experience
- Energy Trust staff is here to listen and respond as needed to questions
- We will be taking notes and monitoring the chat to make sure all the input is gathered
- Direct message Niko in the chat if you need any technical support

Today's facilitators



Chris Wallace Caldwell



Adam Segal

Today's notetakers



Kyle Yoshioka



Niko Swanson-Brownell

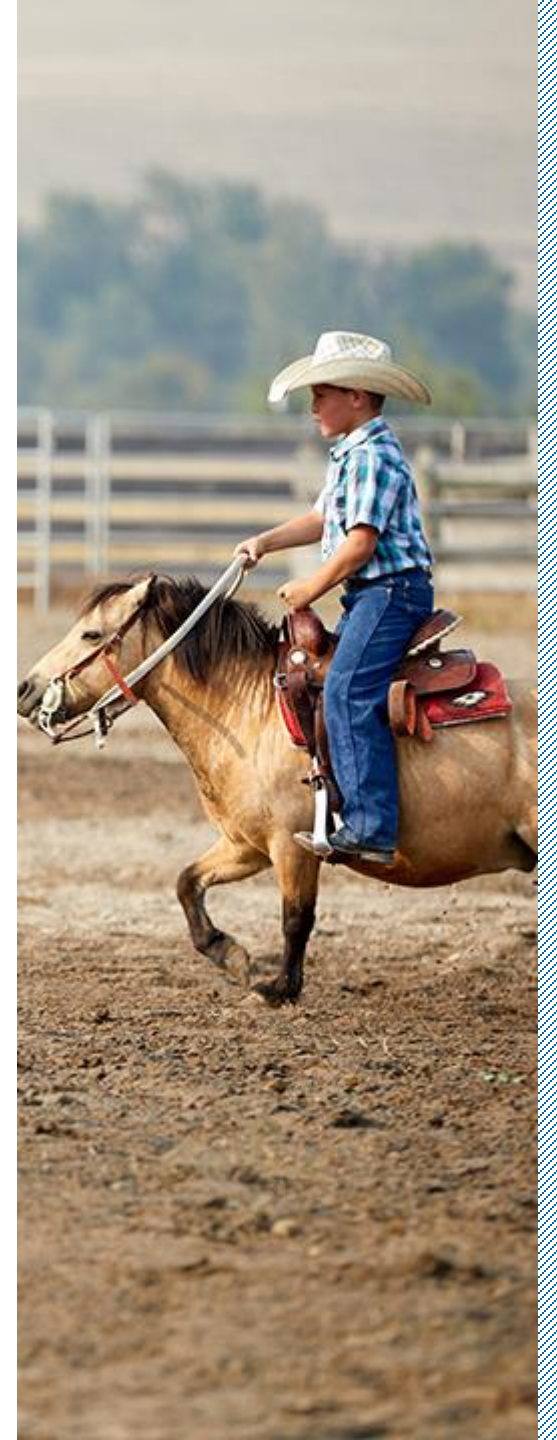
Hearing from you

- We want to provide many opportunities for input
 - Questions for clarity throughout presentation in chat
 - Full group Q&A and opportunity for reflection
 - Poll to gather written input
 - Small group discussions to allow deeper conversation
 - Follow-up survey for additional reflections
- We will avoid jargon as best we can, please ask if we don't!
- Definitions available at energytrust.org/multiyearplan
- We will ask for your feedback on how we did today and how we can continue to share our work throughout 2025



Agenda

- Opening (15 mins)
- Energy Trust vision and customer benefits (5 mins)
- Planning for 2026-2030 (10 mins)
- Questions and clarifications (15 minutes)
- Industry and agriculture sector background (15 mins)
- Break and poll (15 mins)
- Sector activities and equity approaches (35 mins)
- Break (10 mins)
- Small group discussions (45 mins)
- Next steps and future engagements (20 mins)





Other opportunities

- Introductory information will be repeated at multiple workshops
 - Residential: Feb. 20, 9 am-12 pm
 - Industrial and agriculture: Feb. 27, 1-4 pm
 - Renewable energy: March 6, 1-4 pm
 - Commercial (includes multifamily): March 13, 1-4 pm
 - Rural customer services: March 17, 9 am-12 pm
- Workshops will be recorded and posted at energytrust.org/multiyearplan

Questions to keep in mind

- Which market factors do you think are most important to pay attention to?
- What are the biggest opportunities to accelerate savings over the next five years?
- Will the activities we present address customer needs?
- What equity outcomes are most important?
- What have we missed?



About Energy Trust

Delivering customer benefits



Independent nonprofit



Serving 2.4 million customers of Pacific Power, Portland General Electric, NW Natural, Cascade Natural Gas and Avista



Funding agreement with Oregon Public Utility Commission for delivery of regulated utility programs



Delivering cash incentives, resources for energy efficiency, small scale renewable energy and battery storage



Utility bill savings for customers and avoided costs for utilities that keep rates as low as possible for everyone

Energy Trust programs and services



Residential efficiency



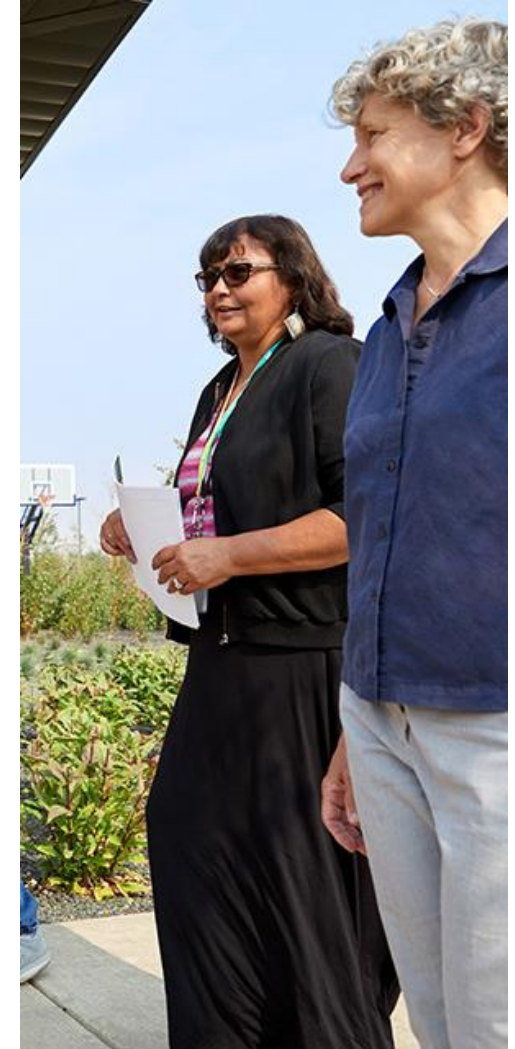
Commercial efficiency



Industrial and agricultural efficiency



Renewable energy



Activities that serve all customers

Planning for 2026-2030

Energy Trust Role

MAXIMIZING CLEAN, AFFORDABLE ENERGY ACQUISITION

Supporting customers and communities to reduce energy costs and realize additional benefits

2025-2030 Areas of Focus

Reducing the
cost of
decarbonization

Creating greater
impact for priority
customers

Motivating the next
level of customer
participation

Supporting
community
resilience

Empowering
customers to navigate
more choices

The future we are planning for

- Extreme weather events due to climate change will occur with increasing frequency
- Decarbonization will remain a state priority
- Energy affordability will remain a pressing concern
- Potential for funding and opportunities for customers and community organizations, driving need for education, training and workforce development
 - We're monitoring federal policy and have ways of adjusting the strategic plan if significant changes occur
 - State funding is stable





Energy Trust's role in 2025-2030

- Continue to offer broad portfolio of services for all customer groups to benefit from clean energy
- Help state and utilities achieve clean energy goals
- Accelerate investments to reduce customers' costs, remove barriers and help them realize other benefits
- Mitigate future rate increases and make decarbonization more affordable
- Deepen relationships and form new ones with communities, local and Tribal governments to help them accomplish objectives that relate to our purpose
- Support workforce development and trades

2026-2030 planning approach



Provides a roadmap to enacting our 2025-2030 Strategic Plan



Engages utilities and stakeholders more on program implementation and helps to realize internal efficiencies



Enables new, longer-term program approaches that reach customers we have not served



Provides an opportunity to redesign revenue mechanisms in a way that is more transparent and better supports affordability



Includes a regular forecasting approach that increases visibility into program effectiveness and progress towards the multiyear plan targets

What will be in the 2026-2030 Multiyear Plan



Business needs: What program strategies and activities will we employ?



Human resource needs: What staff and skills will we need?



Financial needs: What resources will we need and where will we invest? *Includes energy targets*



Complementary funding strategy: How will we use non-ratepayer funds such as grants and contracts?

Setting energy targets

- Represent the maximum achievable, cost-effective energy efficiency in the next five years
- Includes electric and natural gas savings
- Also includes electric generation and battery storage targets
- In development with utility partners with Oregon Public Utility Commission through spring 2025

Draft 2026-2030 savings and generation targets

Targets represent the maximum achievable, cost-effective efficiency, electric generation and battery storage targets

	DRAFT 5-year Savings or Generation Targets	% of 5-year Current Planning Approach*
Electric savings	243.3 aMW	114%
Gas savings	41.3 MMth	117%
Renewable generation	45 aMW	167%

aMW is average megawatt of electricity, MMth is million therms of natural gas

**Current planning approach is annual budget and planning process over previous five years*

Draft 2026-2030 savings and generation targets

Targets represent the maximum achievable, cost-effective efficiency, electric generation and battery storage targets

Sector	Electric Savings Target (aMW)	Percent of Savings Target	Gas Savings Target (MMth)	Percent of Savings Target
Total	243.3	100%	41.3	100%
Residential	35.0	14%	12.8	31%
Commercial	115.1	47%	19.1	46%
Industry and agriculture	93.2	38%	9.4	23%

*aMW is average megawatt of electricity, MMth is million therms of natural gas
Columns may not total due to rounding*

Questions and Clarifications

Industry and Agriculture Summary and Outlook



Who we serve

- Industrial and manufacturing facilities
- Agriculture, nurseries, dairies and irrigators
- Water and wastewater treatment facilities

Sector overview

Industry and Agriculture Sector

Custom

Standard

Lighting

Future

Capital
Upgrades
+
Operations
and
Maintenance

Strategic
Energy
Management
(SEM)

Incentives for
Common
Equipment
Upgrades

Incentives
Delivered by
Contractors; in
Retailers;
Small
Business Offer

Midstream
Lighting +
Non-lighting
Offers

Custom

Brentwood Corporation

Installed an on-demand dust collection system and variable speed drives, isolation gates and master controller

Cash Incentive: \$257,600

Savings:

- 1,300,000 kWh/year
- \$86,000 in estimated annual energy cost



“This is one of the most compelling capital projects we have ever completed because it offers real dollar savings in electricity and is not dependent on changing market or business demands...”

Dan Wagner, plant engineering and maintenance manager, Brentwood Corporation

Strategic Energy Management

Smith Frozen Foods

Made low- and no-cost improvements that save energy like optimizing refrigeration and heating settings; doing compressor maintenance; and adjusting the production schedule

Savings:

- 1,100,000 annual kWh
- \$59,000 in estimated annual energy cost



“It’s amazing how much you save when you get all employees involved in questioning how you operate equipment or whether it needs to be on at a particular time.”

Vernon Hawks, Plant Manager, Smith Frozen Foods

Standard

Criss Farms

Installed smaller, energy-efficient pump and new irrigation system that saves energy, reduces water use and reduces labor needed to irrigate alfalfa and grain fields

Cash Incentives: \$21,000

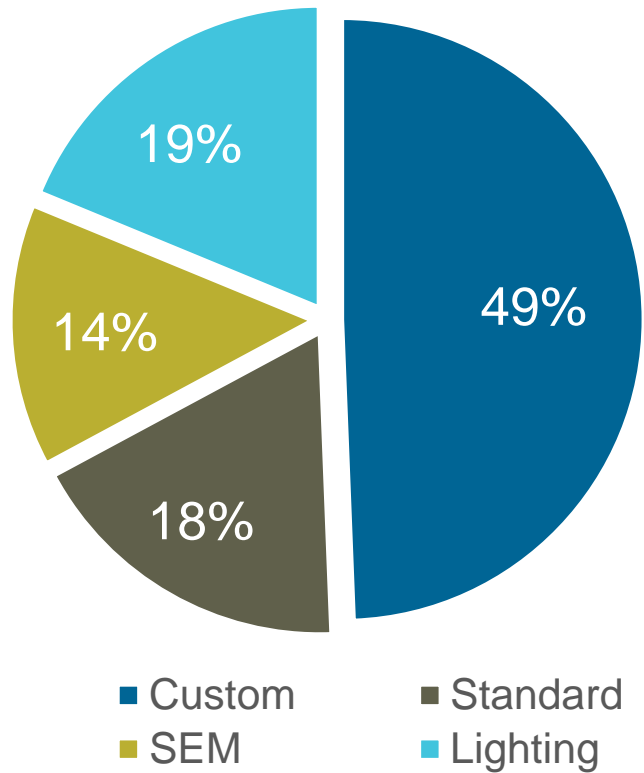
Savings:

- 84,000 annual kWh
- \$5,900 in estimated annual energy cost

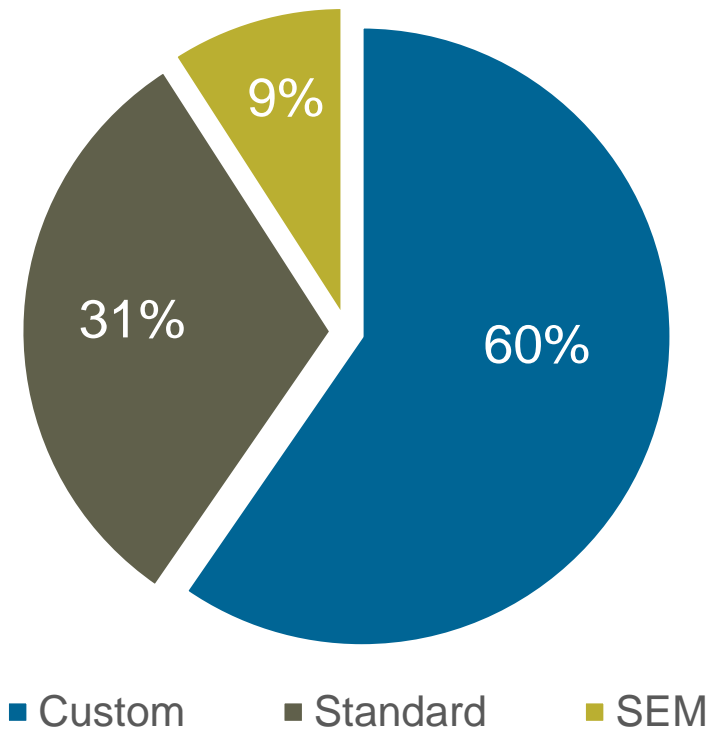


2026-2030 sector savings

Electric Savings



Gas Savings



Assumptions

- Core tactics started in 2023 to increase savings will continue
- 2026-2030
 - Delivery infrastructure will continue ramping up
 - Incentive increases likely
 - Significant reduction in lighting savings related to HB 2531
- Program stability
 - No major offer changes that slow momentum



Uncertainties

- High tech sector participation
- Supply chain, labor shortages
- Federal policy (e.g., tariffs)
- Future legislation, code changes
- Change happens quickly and in unexpected ways (i.e., pandemic)
- Large, unexpected projects may develop



Poll and break

Which market factors do you think are most important to pay attention to?

What have we missed?

Would anyone like to share more about your answer or what you see here in the poll results?

Supporting customers

<i>Customer Need</i>	<i>Program Offer</i>
Inflation, price increases, cashflow	<ul style="list-style-type: none">• Incentives• Variety of offers, incl. low/no-cost O&M• Ability to assign payment to contractor
Long equipment lead times, supply chain issues	<ul style="list-style-type: none">• Operations & Maintenance• Strategic Energy Management (SEM)• Accommodation for customer purchasing timelines
Staffing constraints	<ul style="list-style-type: none">• Account managers and SEM coaches• Internship offer
Production prioritized over energy efficiency	<ul style="list-style-type: none">• Long-term account manager relationships• Technical support for planning and scoping



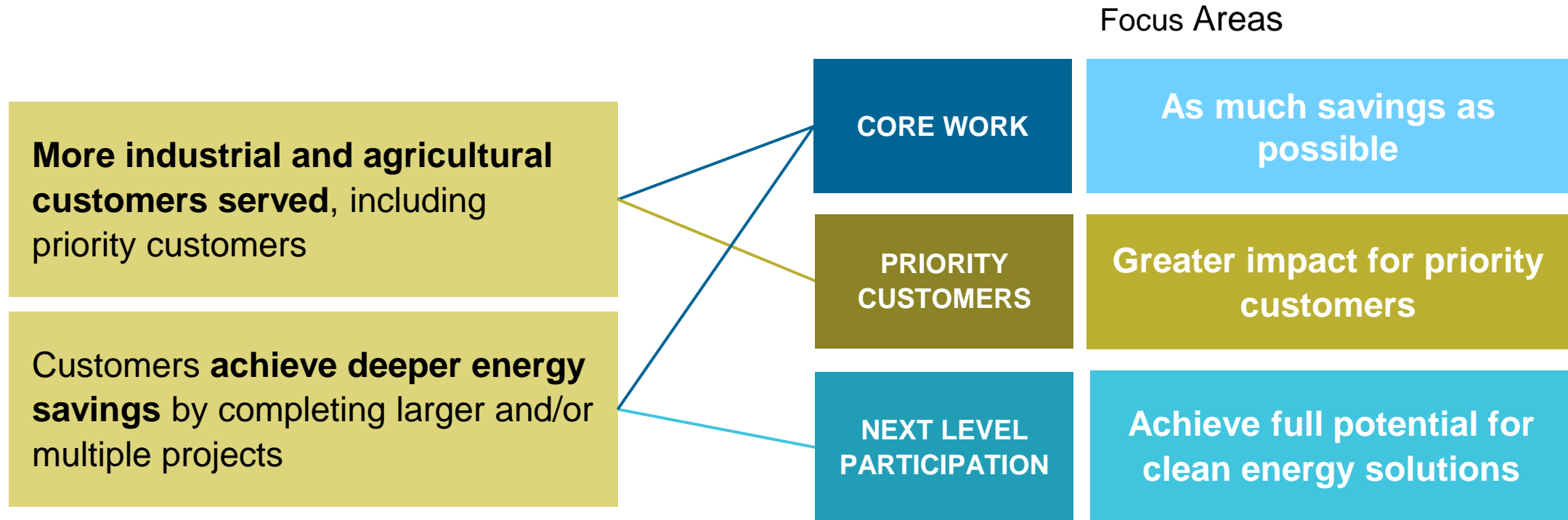
Core strategies for 2026-2030

Activity		Customer Experience	Strategic Outcome
Increase Delivery Capacity	<ul style="list-style-type: none">• Outreach to customers, vendors/contractors• Account management• Priority Account Managers	<ul style="list-style-type: none">• Personalized, high-touch• Beginning-to-end support	<ul style="list-style-type: none">• Maximize savings• Serve priority customers
Boost Incentives	<ul style="list-style-type: none">• 2023 & 2024• Additional increase TBD	<ul style="list-style-type: none">• Enable additional and larger projects• Comprehensive savings	<ul style="list-style-type: none">• More participation• Deeper savings

Core strategies for 2026-2030

<i>Activity</i>		<i>Customer Experience</i>	<i>Strategic Outcome</i>
Proactive Project Development	<ul style="list-style-type: none"> Relationships with customers, economic development Large and complex projects New technologies/applications 	Technical support for EE decision-making early in design process	Maximize savings
Program Design	Business Lighting evolution, post HB2531	Continuation of offer	More participation
	Relaunch midstream with lighting and non-lighting measures	Easy way to receive incentives	Maximize savings
	Explore new offers for priority customers / small business	No/low-cost options	Serve priority customers

Near-term outcomes



Discussion

Does anyone have any clarifying questions about the activities we have discussed?

Equity approaches

Equity Workgroup & Continuous Improvement

Customer Outreach

Program Offers

Contractor
Development

Equity approaches

Customer Outreach

Regional Staffing

Priority Account
Managers

Rural Outreach
& Support

Equity approaches

Program Offers

Variety of Offers

Strategic Energy
Management
Enhancements

Low- and No-Cost
Offers for Small
Businesses

Equity approaches

Contractor Development

Recruitment and Collaboration

Mentorship
and Customized Support

Equity approaches

Equity Workgroup & Continuous Improvement

Customer Outreach

Program Offers

Contractor
Development

Priority
Account
Managers

Rural
Support

Regional
Staffing

Strategic
Energy
Management

Low- and No-
Cost Offers
for Small
Businesses

Recruitment
and
Collaboration

Mentorship
and
Customized
Support

Small group discussions

BREAKOUT 1 PROGRAM ACTIVITIES

- What are the biggest opportunities to accelerate savings in the industrial and agriculture sector over the next five years?
- Will the activities we presented address the customer needs you see in the market?

BREAKOUT 2 EQUITY APPROACHES

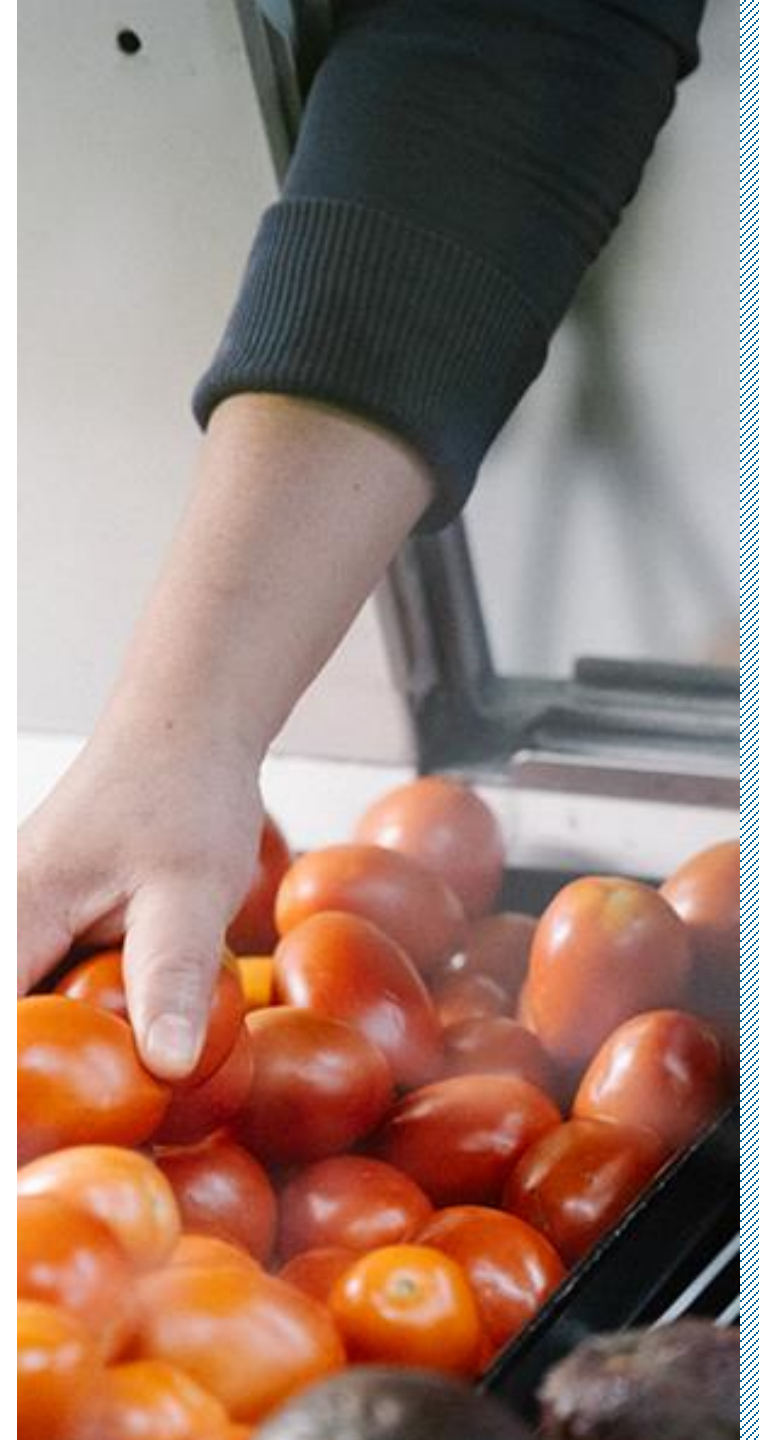
- What equity outcomes in the industrial and agriculture sector are most important to you and your community?
- What equity activities should we consider that we haven't noted?
- What do we need to pay attention over the next five years?

As we return, please **re-select your language:**
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the bottom of the screen or in the "More" menu
(could appear as three little dots)

Wrap Up

Additional feedback

- Thank you again for your time and feedback today
- Your input will be summarized and used to adjust strategies to serve customers' needs
- We will send an email with optional survey to get additional thoughts and feedback on this process and the questions posed today



Next steps and future engagements

Information will be updated all year at energytrust.org/multiyearplan

- Registration information for other workshops:
 - Renewable energy: March 6, 1-4 pm
 - Commercial (includes multifamily): March 13, 1-4 pm
 - Rural customer services: March 17, 9 am-12 pm
- Recordings and summaries of all workshops
- Form to provide feedback throughout the year





Thank you

energytrust.org/multiyearplan