

MULTIYEAR PLANNING RESIDENTIAL STAKEHOLDER WORKSHOP SUMMARY

Energy Trust held a virtual workshop February 20, 2025, for stakeholders interested in learning about and providing input on Energy Trust's energy efficiency programs and services for residential customers for the next five years. Staff presented information on the organization's background and services, 2025-2030 Strategic Plan and the transition to multiyear planning, replacing its current annual budgeting process. The workshop content also included draft energy savings targets. Staff that manage residential programs and services presented information on the sector's structure and offers and key strategies they plan to pursue:

- Increasing investments to engage more customers, especially priority customers, by expanding program-delivered retrofit services, expanding Community Partner Funding, and growing offers delivered by trade allies (including region-specific offers, Savings Within Reach and rental offers.
- Streamlining pathways for greater energy savings, including expanding midstream (or instant discounts) to include HVAC and other products, expanding use of Home Energy Reports and adding more products on the online marketplace.

Participants could ask questions and respond to information presented during full group question and answer breaks, in the Zoom chat, in a short poll, in small group discussions and in a follow-up survey after the workshop. Energy Trust and other attendees answered questions throughout the presentation and those responses are not included here. The following are themes that emerged from participants, including specific comments and questions:

Continue working with regional partners.

Participants asked about Energy Trust's plans to continue work with community-based organizations (CBOs) through Community Partner Funding, including who Energy Trust works with and what sort of offers will be available. Many encouraged continued work with CBOs and noted benefits of that model in serving priority customers.

- *Working with CBOs and gaining customer trust is helpful, especially when you're getting programs started.*
- *We are a community partner and offer home energy assessments in certain parts of Oregon. Customers get the information they need to make their homes more efficient, and we have a good success rate with assessments.*
- *I'm supportive of additional staff (at Energy Trust) to ramp up these delivery channels. Risk I see is CBO staff taking these Energy Trust jobs just need staff on the ground too.*

Explore funding and support for critical home repairs.

Participants noted the need for funding critical repairs and how Energy Trust could assist in funding. These repairs are often needed before energy-savings upgrades can be installed.

- *How will Energy Trust will support additional critical home repairs given constraints about project/measure cost effectiveness?*

Consider resources and outreach to renters.

Participants asked about support for renters, especially in rural areas, and how can Energy Trust serve the renter communities in effective ways given the limits they face on improvements to their living space.

- *Tenants don't have the access to these renovations. When they need an improvement, they can't get that because the owners don't want to spend money. If they do make that change, it could lead to higher rent prices...How do we get this information into the community? When we talk about it to the community, there are a lot of questions about it. And it's hard for one organization to reach out to the whole community.*

Consider affordability and access with any transition.

Costs and affordability should be key areas of focus as Energy Trust considers any changes to services for customers, including expanding midstream. Think broadly about the regions in which people live and whether offers and approaches need to differ in those places. Some stores are more difficult to support because of their location. It is a barrier, and Energy Trust is working to address it.

- *I advocate for residential customers that are primarily concerned about affordability. Shifting to a midstream offer, we want to be cognizant of people's utility bills and the public purpose charge.*

Clarify the role of home energy assessments and Home Energy Reports.

Participants asked for clarification about the difference between home energy assessments, home energy scores and Home Energy Reports. Home energy assessments are a way to identify and make recommendations on future energy-savings projects; these are often the initial contact with the customer.

- *Energy Trust used to do their own Home Energy Reports and it was a combo of both electric and gas on one report. Is that part of the thought for a revived program?*
- *Would Energy Trust continue to be investing in CBOs to do home energy assessments, or would it be to do more referrals?*

POLL RESULTS

How do these activities and strategies address the opportunities and needs of the customers and communities you represent/serve?

- I want to know what consideration was made with the current administration that's impacting a lot of community members. Energy efficiency will not be a priority.
- Further investment in CBOs and expanding capacity there would be extremely helpful. Expanding offerings to include funding for deferred maintenance would help expand the reach of Energy Trust.
- In our rural community there is need in all areas, residential, commercial, industrial, for energy efficiency upgrades. Buildings are older and with the exit of our corner stone industry leaving, timber, our economy has not rebounded to address the older infrastructure.
- How can these strategies and activities be paired or presented to residents in places where they already seek trusted information...libraries/health clinics/etc.
- Serving priority customers is good. However, consider that all else being equal, serving customers in harsh climates relative to mild climates will probably result in more energy efficiency savings for the same investment. As an example, insulation in Klamath Falls will go much further than insulation in Portland, not to mention its likelier to absolve high energy burden. Big fan of any program serving manufactured/mobile homes.
- I think we need to focus closely on the kind of work we need done that is not being done, and design positions (at Energy Trust) to fill the gaps in the positions we don't have. We need to consider realities of low-income communities very carefully. Increasing offerings may not make sense if we have not already established funding mechanisms for homeowners to pay for new roofs, for example, or panel upgrades, or whatever they may need to do to their home first BEFORE accessing an incentive or two that Energy Trust may offer.

- Core services are most important: weatherization, HVAC.

What have we missed?

- I'm excited about your shift to midstream retailers for HVAC. We have a retail product portfolio program and participate in the national ESRPP program that incentivizes retailers in the hopes of affecting their marketing and assortment choices. It may be good for us about how these approaches may be distinct from each other and explore where there may be overlap to think how our combined strategies may affect the market and/or residential customers.
- Funding opportunities for fuel switching would be extremely helpful. For example, right now there is not much we can do to help houses that have gas water heaters. Funding for blower door tests or more in-depth energy audit could help people who can't figure out why their energy bills are so high.
- Electric grid reliability is challenging at the moment with outages becoming more common. Education on back up energy source for reliability, could be beneficial.
- How can these strategies and activities be paired or presented to residents in places where they already seek trusted information...libraries/ health clinics/ etc.
- Strategies supporting beneficial electrification, including supporting Oregon's goals to install 500k heat pumps. If Energy Trust must take a fuel neutral approach, it should be prepared to adapt to changing customer needs, especially on the residential level. Electrification may be an essential element of reaching new customers, particularly with low and no cost heat pump measures.
- There is a large focus on the residential customers being directly served by Energy Trust, which is understandable and for good reason. However, also consider the residential customers that are funding Energy Trust's efforts, which is millions of ratepayers. It would be nice if they had some representation too.
- We really need to think about our incentive structure, how Trade Allies fit in, and how cumbersome the reimbursement process is. I would strongly recommend Energy Trust consider applying a LEAN SWAT team to incentive processing so the burden of implementing incentives does not fall on small business trade allies who need to wait six weeks for an incentive reimbursement. I strongly think we need to consider our incentive process structures to eliminate burdens to trade allies and customers. We are not there yet and this work should lead before anything else. We cannot assume our systems are really serving our customers without doing this piece.
- I was surprised to see weatherization receive such a small share of the savings mix and interested in opportunities to advance that.