

## Conservation Advisory Council Meeting Notes

November 18, 2020

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### Attending from the council:

Jeff Bissonnette, NW Energy Coalition  
Warren Cook, Oregon Department of Energy  
Kari Greer, Pacific Power  
Tim Hendricks, representing Building Owners and Managers Association  
Rick Hodges, NW Natural  
Tina Jayaweera, NW Power and Conversation Council  
Anna Kim, Oregon Public Utility Commission  
Jess Kincaid, Bonneville Power Administration (for Dave Moody)  
Jason Klotz, Portland General Electric  
Keith Kueny, Community Action Partnership of Oregon  
Lisa McGarity, Avista  
Mark Rehley, Northwest Energy Efficiency Alliance (for Julia Harper)

### Attending from Energy Trust:

Hannah Cruz	Amanda Sales
Peter West	Jay Ward
Marshall Johnson	Allison Burns
Jeni Hall	Tyrone Henry
Elizabeth Fox	Amanda Zuniga
Debbie Menashe	Quinn Cherf
Julianne Thacher	Scott Leonard
Mana Haeri	Sue Fletcher
Andy Griguhn	Spencer Moersfelder
Kate Wellington	Peter Schaffer
Ben Cartwright	Karen Chase
Alex Novie	Melanie Bissonnette
Thad Roth	Oliver Kesting
Amber Cole	Jay Olson
Amanda Davidowitz	Jackie Goss
Matt Getchell	Amanda Potter
Ryan Crews	Naomi Cole
Steve Lacey	Eric Van Orden
Derek Olson	Karen Chase
Shelly Carlton	Mark Wyman
Fred Gordon	Adam Bartini
Betsy Kauffman	

### Others attending:

Elee Jen, Energy Trust board	Ryan Bottesini
Alan Meyer, Energy Trust board	Don Jones, Pacific Power
Lindsey Hardy, Energy Trust board	Samuel Patrick, Citizens Utility Board
Silvia Tanner, Multnomah County Office of Sustainability	Charity Spires, Pacific Power
Heather Moline, NW Energy Coalition	Aaron Frechette, Cascade Energy
Jake Wise, PGE	Tamara Falls, PGE
Cristian Salgado, PGE	Joe Marcotte, TRC
	Misti Nelmes, CLEAResult

Dave Backen, Backen Consulting  
Whitney Miller, CLEAResult  
Jenny Sorich, CLEAResult  
Amy Burke, Bonneville Power  
Administration  
Patrick Murphy, CLEAResult  
Cindy Strecker, CLEAResult  
Tina Brooks, Pacific Power  
John Molnar, Roger Machinery Company

Dan Elliott, Oregon Housing and  
Community Services  
Adam Shick, CLEAResult  
Kate Hawley, TRC  
Carrie Ng, Small Business Utility Advocates  
Cathy Chappell, TRC  
Shelley Beaulieu, TRC  
Kirsten Svaren, TRC  
Scott Scheuneman, RHT Energy

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## 1. Welcome

Hannah Cruz, senior communications manager, convened the meeting at 1:31 p.m. over Zoom. The agenda, notes and presentation materials are available at [www.energytrust.org/about/public-meetings/conservation-advisory-council-meetings](http://www.energytrust.org/about/public-meetings/conservation-advisory-council-meetings).

Hannah Cruz announced Energy Trust's Peter West will retire in early 2021 and thanked him for his leadership and dedication. Peter West credited the cooperative work of many groups and stakeholders in Oregon for the progress made in energy efficiency. A national recruiting effort will start in a few weeks for a new director of energy programs. Council members will be sent a survey in the next few weeks and will be asked for input on the position description.

Hannah Cruz introduced Jeff Bissonnette from NW Energy Coalition as a new member of the council and announced Keith Kueny would be leaving the council after taking a job out of state.

## 2. Residential Incentives for Low-Income Utility Customers

### *Topic summary*

Marshall Johnson, program manager in the residential team, gave a presentation on how Energy Trust serves customers with low incomes and works with other groups that do so, including Oregon Housing and Community Services, community action agencies and programs funded by utility ratepayers.

Marshall Johnson gave brief descriptions of Energy Trust's initiatives to serve low- to moderate-income residential customers, which include low- and no-cost equipment offers; Savings Within Reach enhanced incentives and financing; single-family rental incentives; fixed price promotions; free manufactured home services; and a manufactured home replacement pilot. Energy Trust also co-funds projects with community organizations to reach customers with low incomes. Co-funding must align with Energy Trust's cost-effectiveness guidelines. An example of this is a pilot with the community action agency in Washington County to fund weatherization upgrades for low-income residents. This led to a new offer, Community Partner Funding, in which community-based organizations can access higher incentives to help their customers install energy-saving improvements.

### *Discussion*

Council members said they were happy to see co-funding efforts paying off (Keith Keuny) and congratulated Energy Trust for achieving this work within the framework for its programs (Warren Cook).

Heather Moline of NW Energy Coalition said it's important for Energy Trust to make this information easy to understand for groups outside the energy industry. Members asked how Energy Trust helps groups that aren't in the industry become more familiar with energy efficiency (Lisa McGarity). Marshall Johnson gave examples of how Energy Trust works with

African American Alliance For Homeownership to train and mentor a home auditor to work with its existing client base, and collaborates with Verde on marketing materials for a ductless heat pump offer in Northeast Portland.

Jake Wise from PGE asked for details on Community Partner Funding attribution. Marshall Johnson explained Energy Trust and Oregon Housing and Community Services coordinate to ensure savings are not double counted.

*Next steps*

None.

The council took a five-minute break.

### **3. 2021 Budget Update**

*Topic summary*

Peter West presented an update on Energy Trust's 2021 budget and action plan. The draft budget was presented to the council and the public at an October workshop. Among the feedback and written public comments received, there was support for thoughtful and proactive community engagement; outreach and inclusive co-creation; responding to the COVID-19 pandemic and wildfires in ways that support small businesses, help communities rebuild and leverage other funding; residential and renewable energy program action plans; coordination with utilities; diversity, equity and inclusion activities; and cost management and transparency. The OPUC also gave recommendations on the draft budget, including that Energy Trust focus on residential offers with peak impacts; develop peak modeling capability; include cost-effectiveness exception costs in future budgets; implement supplier diversity tracking; plan to align staffing with outreach goals; and keep administrative costs in 2022 below 8% of revenues.

Based on this information and other factors, Energy Trust made changes to its draft budget, including decreasing lighting incentives to manage demand driven by spring 2020 bonuses. The bonuses were part of Energy Trust's response to the COVID-19 pandemic. The bonuses have ended, and Energy Trust has paused accepting new applications for lighting incentives until mid-January. Peter West then presented cost and savings changes made to the draft budget.

*Discussion*

None.

*Next steps*

The final proposed budget will be posted online December 3 and the board will consider it for adoption December 11.

### **4. Organizational Response to Rebuilding Efforts Due to Labor Day Wildfires**

*Topic summary*

Sue Fletcher and Karen Chase from Energy Trust's outreach team gave an update on Energy Trust's response to wildfires in Oregon that started this summer. The fires and loss of homes and businesses were unimaginable; the displacement and loss are traumatizing and disproportionately affect vulnerable people. Customers, trade allies, community partners and even Energy Trust staff were directly affected. Household hazardous waste clean-up is largely done, but ash and debris clean-up could take up to 18 months. Most rebuilding will likely happen in 2022 and beyond.

While not an expert or leader on this issue, Energy Trust can be a technical and financial resource for each community rebuilding and retrofitting homes and businesses. So far, impacted communities are focused on emergency response and housing, but some have reached out to

Energy Trust, including about its manufactured home replacement pilot. Scott Leonard, who manages the residential new construction program, described Energy Trust's immediate actions, including addressing marketing and customer service issues and forming an internal project team. Energy Trust is participating in local and state forums, conducting outreach to impacted communities and is one of several organizations helping to fund a housing recovery specialist position at the Housing Authority of Jackson County.

Mark Wyman, who manages residential pilots and new products, described potential offers and approaches, including replacing manufactured homes under Energy Trust's current pilot; modifying program designs to accommodate more owners/buildings and more construction; aligning baselines with state code for new construction rebuilding; supporting resiliency measures like solar and energy storage; targeting incentives; and supporting community-wide planning efforts. These fires give rationale for Energy Trust to provide a custom approach to match the challenges people are facing and may again in the future.

#### *Discussion*

Carrie Ng of Small Business Utility Advocates asked about assistance programs for small businesses affected by the fires. Karen Chase said each community is approaching commercial sector support differently.

#### *Next steps*

None.

## **5. 2021 Industrial Sector Standard Track RFP and Technical Review RFQ**

### *Topic summary*

Amanda Potter and Adam Bartini from the industrial sector previewed a request for proposals (RFP) for the standard track and request for qualifications (RFQ) for technical review that will be issued in 2021. They also gave background on how the Production Efficiency program is run, what of customers it serves and the incentive offers provided.

The standard track delivers electric and gas prescriptive and calculated energy efficiency projects. Goals for the RFP include achieving cost-effective energy savings targets; broadening the Trade Ally Network; equitably serving customers across Energy Trust territory; and developing new efficiency measures. Bidders should have experience in industrial energy efficiency, implementation, trade ally management and measure development. Scoring will prioritize pricing and energy savings, followed by diversity, equity and inclusion qualifications, implementation strategy and contracting plan. These are similar criteria to what was used to score this year's Existing Buildings and business lighting RFP.

For the technical review RFQ, Energy Trust seeks an energy-efficiency engineering contractor to perform technical reviews of studies, incentive offers and project verifications. Technical reviews ensure program requirements are met and verifies energy savings. Bidders should have experience in industrial energy efficiency, project management and with some systems or technologies used.

Draft plans were presented, and details could change.

### *Discussion*

Jake Wise from PGE asked Energy Trust is doing to help support diverse firms. Amanda Potter said there will be new outreach efforts, including a webinar in January for potential bidders.

Members asked what lessons from the recent Existing Buildings and business lighting RFP are being applied here (Anna Kim). Amanda Potter noted several things: understanding the market

needs time to develop teams; requiring a Certification Office for Business Inclusion and Diversity (COBID) application instead of certification; having a member of the Diversity Advisory Council and Energy Trust's diversity, equity and inclusion lead serve on the scoring committee; and increasing the minimum DEI subcontracting percentage.

Hannah Cruz asked why bidders for the technical review RFQ requirement must have experience with some but not all systems or technologies. Adam Bartini said that's because Energy Trust deals with so many different systems. Members suggested requiring experience with certain systems (Lisa McGarity, Anna Kim). Staff will consider this suggestion.

*Next steps*

None.

## **6. Residential Non-energy Benefits Research**

*Topic summary*

Mark Wyman and Jeni Hall presented research on non-energy benefits of energy efficiency and renewable energy projects at residential sites, in an effort to understand other quantifiable benefits from distributed energy resource technologies for new homes beyond energy savings and generation. The research found non-energy benefits included better health and fewer missed days at work; it also showed benefits related to energy resilience and reduced energy burden.

*Discussion*

Don Jones at Pacific Power noted similar research happening in Washington, and that in the future, explicit annual reporting on non-energy benefits might be helpful. Energy Trust already tracks quantifiable non-energy benefits.

Members asked if the health benefits, which were reported for low-income utility customers, may translate to other types of customers and if electric vehicles come with timers for chargers (Lisa McGarity). The health benefits likely do apply to other customer groups but that existing research is limited. Electric vehicles can be programmed to start and stop charging at certain times.

*Next steps*

Energy Trust will coordinate with the OPUC on non-energy benefits and incorporate values into energy-efficiency measure approval documents as they come up for renewal.

## **7. Adjournment**

The meeting adjourned at 4:52 p.m. The next meeting will be in February 2021.