Energy Trust Collaboration Opportunities
OECA Meeting – May 2023
Agenda

» Energy Trust Program Background

» Incentive Tiers

» Community Partner Funding
  • Participating CBO Partners
  • CPF Incentives
  • Collaboration with CAO
  • No-Cost DHP Offer
About us

- Serving 1.6 million customers of Portland General Electric, Pacific Power, NW Natural, Cascade Natural Gas and Avista
- Providing access to affordable energy
- Generating homegrown, renewable power
- Building a stronger Oregon and SW Washington
DIY Tips and Resources

Visit the Energy Trust site to find resources for do-it-yourself projects and low-to-no-cost ways to improve the comfort, health and energy efficiency of your home.

Choosing the right home cooling solution

https://www.energytrust.org/residential/diy
Online Home Assessment

ENERGY-EFFICIENT HOME IMPROVEMENTS

Add insulation
Install renewable energy systems
Install smart thermostat
Install low-flow water fixtures
Seal ductwork
Seal air leaks
Choose energy-efficient appliances
Switch to energy-efficient light bulbs
Plant trees and bushes
Upgrade to double glazing windows
Schedule water heating maintenance
Upgrade heating & cooling system

Take our free online home assessment
www.energytrust.org/assessment
## Special Offers and Services

<table>
<thead>
<tr>
<th>No-Cost Offers</th>
<th>Energy Trust Discounts</th>
</tr>
</thead>
<tbody>
<tr>
<td>Free Duct Sealing (manufactured home residents only)</td>
<td>Covers full cost</td>
</tr>
<tr>
<td>Online Home Energy Assessment</td>
<td>Free</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Lower-Cost Offers</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Smart Thermostat</td>
<td>$80</td>
</tr>
<tr>
<td>Attic Insulation ~ \textit{65% off}^*</td>
<td>Up to $1.25/sq ft</td>
</tr>
<tr>
<td>Attic Insulation ~ \textit{75% off}^* (rental property or moderate-income residents only)</td>
<td>Up to $1.50/sq ft</td>
</tr>
<tr>
<td>Ductless Heat Pump Promotions ~ \textit{30-50% off}^*</td>
<td>Manufactured Homes: $3,500 Rentals: $1,500</td>
</tr>
<tr>
<td>Ducted Heat Pump Promotion ~ \textit{50% off}^*</td>
<td>Manufactured Homes $4,000</td>
</tr>
</tbody>
</table>
Manufactured Homes

Heat Pump Promotion
• Limited time offer
• Savings up to $4,000 on a new heat pump
• Available only through select trade allies

Ductless Heat Pump Promotion
• Limited time offer
• Savings up to $3,500 on a new heat pump
• Available only through select trade allies

No-Cost Services
• Select trade allies can offer duct sealing and repair at no cost
Trade Ally Contractor

Use the Find a Trade Ally Contractor tool
• Search by company, services or zip code
• www.energytrust.org/find-a-contractor

Find a Trade Ally Contractor
or other Ally Professional

I need help with
What service are you looking for? Zip Code
Find company
What company are you looking for? SEARCH

Energy Trust works with trade ally contractors and other allied professionals that are part of our on-the-ground network that connects customers to incentives and services.
Tiered Incentive Structures

- **Community Partner Funding**: Highest incentives reserved for community agencies reaching underserved customers, including low-to-moderate income, rural customers, and communities of color.

- **Savings Within Reach**: Set of increased incentives for low-to-moderate income customers or renters delivered by trade ally contractors. Affordable financing option available.

- **Standard Incentives**: Standard incentive amounts available to all customers.
Energy Trust of Oregon Incentives

- Heating and Cooling
  - Heat Pumps
  - Ductless Heat Pumps
  - Heat Pump Controls
  - Smart Thermostat
  - Gas Fireplaces and Furnaces
  - Extended Capacity Heat Pumps
  - Central AC

- Insulation
  - Attic
  - Wall (Includes Kneewall & Rim Joist)
  - Floor

- Windows

- Water Heaters
  - Heat Pump Water Heater
  - Gas Tankless Water Heater

*Handout with the full list of standard rebates and offers available
Savings Within Reach

• Refer to the Savings Within Reach income guidelines to determine if you qualify

• Income as defined by the IRS income tax return

• If household income is below guidelines, customer may be eligible for free weatherization assistance services
Savings Within Reach

• Increased cash rebates available for income-qualified households

• Available only through a select group of participating contractors

• Contractor deducts rebate amount from invoice, reducing out-of-pocket expenses

*Handout with the full list of Savings Within Reach rebates available
On-Bill Loan Repayment

- Energy Trust works with regional nonprofit lenders to offer an on-bill loan repayment option
- Qualifying customers may apply for a loan with affordable rates for energy efficiency home improvements that are eligible for Energy Trust incentives
- Loan repayment included on utility bill
Community Partner Funding
Community Partner Funding

- Energy Trust’s highest incentives for clients of organizations that serve:
  - people experiencing lower incomes
  - communities of color
  - Indigenous communities
  - rural communities
  - people experiencing disabilities

- Current collaborations
  - **15+** Community-based Organizations (CBOs)
  - **2** Community Action Agencies (CAAs)
  - CAO and YCAP
## CPF – Participating CBOs (Residential)

<table>
<thead>
<tr>
<th>Portland Metro</th>
<th>Central/Southern OR</th>
<th>Eastern Oregon</th>
</tr>
</thead>
<tbody>
<tr>
<td>Verde</td>
<td>Lake County Resources Initiative</td>
<td>EUVALCREE</td>
</tr>
<tr>
<td>Community Energy Project</td>
<td>NeighborWorks Umpqua</td>
<td>Sustainable Living Center</td>
</tr>
<tr>
<td>African American Alliance for Homeownership</td>
<td>Warm Springs Housing Authority</td>
<td>Wallowa Resources</td>
</tr>
<tr>
<td>Renovate PDX</td>
<td>Indigenous Helpers</td>
<td></td>
</tr>
<tr>
<td>Washington County Office of Community Development</td>
<td>Illinois Valley Community Development Organization (IVCDO)</td>
<td>Willamette Valley</td>
</tr>
<tr>
<td>Portland Community Reinvestment Initiatives</td>
<td></td>
<td>Seeds for the Sol</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Polk CDC</td>
</tr>
</tbody>
</table>
**CPF Incentives**

**DISCOUNTS AVAILABLE THROUGH COMMUNITY PARTNERS**

Community partners working with Energy Trust of Oregon can help you get the following discounts on energy-saving upgrades.

### NO-COST OFFERS

You may be eligible for Energy Trust discounts that may cover the full cost of the following energy upgrades.

<table>
<thead>
<tr>
<th>Service</th>
<th>Approximate Final Cost After Discount*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attic/Ceiling, Floor or Wall Insulation</td>
<td>$0</td>
</tr>
<tr>
<td>Ductless Heat Pump - Income Qualified</td>
<td>$0</td>
</tr>
</tbody>
</table>

*See other side for more details.*

### HEATING + COOLING

Heating and cooling systems work hard to provide comfort throughout the year. Replacing old, inefficient equipment helps to improve performance and reduce costs.

<table>
<thead>
<tr>
<th>Service</th>
<th>Energy Trust Discounts*</th>
<th>Approximate Final Cost After Discount*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ductless Heat Pump</td>
<td>Up to $3,500</td>
<td>$1,000-$2,000</td>
</tr>
<tr>
<td>Ducted Heat Pump</td>
<td>$4,000</td>
<td>$2,000-$3,000</td>
</tr>
<tr>
<td>High-Efficiency Gas Furnace</td>
<td>$1,400</td>
<td>$3,600-$4,500</td>
</tr>
<tr>
<td>Smart Thermostat</td>
<td>$150</td>
<td>$200-$250</td>
</tr>
</tbody>
</table>

*Minimum 90% Annual Fuel Utilization Efficiency (AFUE).*
## CPF Incentives

### WINDOWS + INSULATION

- **Home feeling drafty in the winter? Too hot in the summer?**
- **Experiencing high energy bills?**
- **Weatherization improvements can make a big difference.**

<table>
<thead>
<tr>
<th>Description</th>
<th>Energy Trust Discounts*</th>
<th>Approximate Final Cost After Discount*</th>
</tr>
</thead>
</table>
| **Windows**
Must install windows with an eligible energy efficiency U-value rating. | Up to $1.50 per sq. ft. | Variable                               |
| **Attic/Ceiling Insulation**
For homes with less than 5–6 inches (R-18 or less) of existing attic insulation. | Up to $3.00 per sq. ft. | $0–$500                                |
| **Floor Insulation**
For homes with less than 3–4 inches (R-11 or less) of existing floor insulation. | Up to $3.65 per sq. ft. | $0–$2,000**                            |
| **Wall, Rim Joist or Knee Wall Insulation**
For homes with minimal insulation (R-4 or less) in the walls, rim joists and/or knee walls. | Up to $3.30 per sq. ft. | $0–$500                                |

### WATER HEATING

- **Between the bath, kitchen and laundry room, hot water is always in demand.**
- **New high-efficiency hot water heaters use less energy, save money, and keep hot water flowing.**

<table>
<thead>
<tr>
<th>Description</th>
<th>Energy Trust Discounts*</th>
<th>Approximate Final Cost After Discount*</th>
</tr>
</thead>
</table>
| **Hybrid Water Heater**
For homes replacing storage tank water heaters. | $240                      | $1,750–$2,750                         |
Collaboration with Community Action
Collaboration with CAO (since 2019)

- **CAO's workflow:**
  1. Perform energy audit
     - Collect signature on 300 CPF Customer Authorization Form
  2. CAO contractors perform installments
  3. Inspects installments
  4. Submits incentive request to Energy Trust
  5. Receives Energy Trust incentives
     - Finance processes a credit towards our regular ECHO allocation
  6. Reports project completion in OPUS

## Diagram:

1. **CAO audit documentation + 300 CPF** → **Contractor Invoices**
2. **Contractor Invoices** → **Incentive Request Spreadsheet**
3. **Incentive Request Spreadsheet** → **CAO inspection documentation**
4. **CAO inspection documentation** → **Energy Trust**
CAO & Energy Trust Results

• Since Fall 2019, CAO has received about $1m in Energy Trust co-funding

• PY 21/22 Results:
  • $293,511 was applied across 67 sites
  • About 10% of funding was direct administrative funding to CAO
  • Energy Trust stretched CAO’s funding
  • Enabled CAO to serve 36 additional customers, leading to a total of 102 customers served.
No-Cost Ductless Heat Pumps
No-Cost DHP Offer

- Designed for 60% SMI or below
- Pilot Premise:
  - Can a no-cost DHP reduce energy burden?

Results since September 2022

<table>
<thead>
<tr>
<th>Housing Type</th>
<th>Units Served</th>
<th>Incentives Paid</th>
</tr>
</thead>
<tbody>
<tr>
<td>Single-family</td>
<td>50</td>
<td>$283,434</td>
</tr>
<tr>
<td>Multifamily</td>
<td>104</td>
<td>$531,279</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>154</strong></td>
<td><strong>$814,713</strong></td>
</tr>
</tbody>
</table>

- Average Household size: 2.1 persons
- Average Household Gross Income:
  - $915 (Monthly)
  - $10,980 (Annual)
No-Cost DHP Offer

How CAO/YCAP Access this Offer
• Required Documentation
  • 300 CPF
  • DHP Questionnaire
  • Contractor Invoice & AHRI cert
  • Photo of the installed indoor unit

• Potential Application:
  • LIHEAP EA- funded Emergency Heating Replacements

<table>
<thead>
<tr>
<th>Number of Indoor DHP Heads</th>
<th>Maximum Incentive</th>
</tr>
</thead>
<tbody>
<tr>
<td>One</td>
<td>$4,800</td>
</tr>
<tr>
<td>Two</td>
<td>$7,200</td>
</tr>
</tbody>
</table>
Other Example: CAA Collaboration

No-Cost Offers with ORCCA

- If ORCCA auditors find a home with:
  - DHP opportunity and/or Attic Insulation opportunity
  - Minimal health and safety repairs

---

**ORCCA refers customer to Energy Trust**

**Energy Trust connects customer with a contractor**

**DHP/attic insulation install at no-cost!**

---

**NO-COST OFFERS**

You may be eligible for Energy Trust discounts that may cover the full cost of the following energy upgrades.

<table>
<thead>
<tr>
<th>Energy Upgrade</th>
<th>Approximate Final Cost After Discount*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attic/Ceiling, Floor or Wall Insulation</td>
<td>$0</td>
</tr>
<tr>
<td>Ductless Heat Pump - Income Qualified</td>
<td>$0</td>
</tr>
</tbody>
</table>

For homes replacing electric resistance heat (like an electric furnace, baseboard heat, or wall cadets) in a primary living space. No-cost ductless heat pump offer is only available to homeowners that meet lower income qualifications.

Interested in this type of collaboration?

Let us know!
Thank you!

Marshall Johnson
Marshall.Johnson@energytrust.org
503.445.2949

Zuly Muñoz
zmunoz@caowash.org
503.693.3256
Low Income Weatherization Services & Utility Bill Assistance

You may be eligible for **FREE** services to make your home more comfortable, safe, and healthy

- Reduce energy bills by making homes more energy efficient
- Weatherization services may include:
  - Home energy evaluation
  - Home ventilation
  - LED light bulbs
  - Attic, floor, or wall insulation
  - Windows (occasionally)
  - Weather stripping doors
  - Furnace evaluation

For more information, call 1.866.368.7878

Certain utilities now offer Income-Qualified Bill Discount Programs, which provides a monthly bill discount based on your income. For more information, contact your utility or go to: [https://www.energytrust.org/residential/income-qualified-services/community-resources/](https://www.energytrust.org/residential/income-qualified-services/community-resources/)