



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

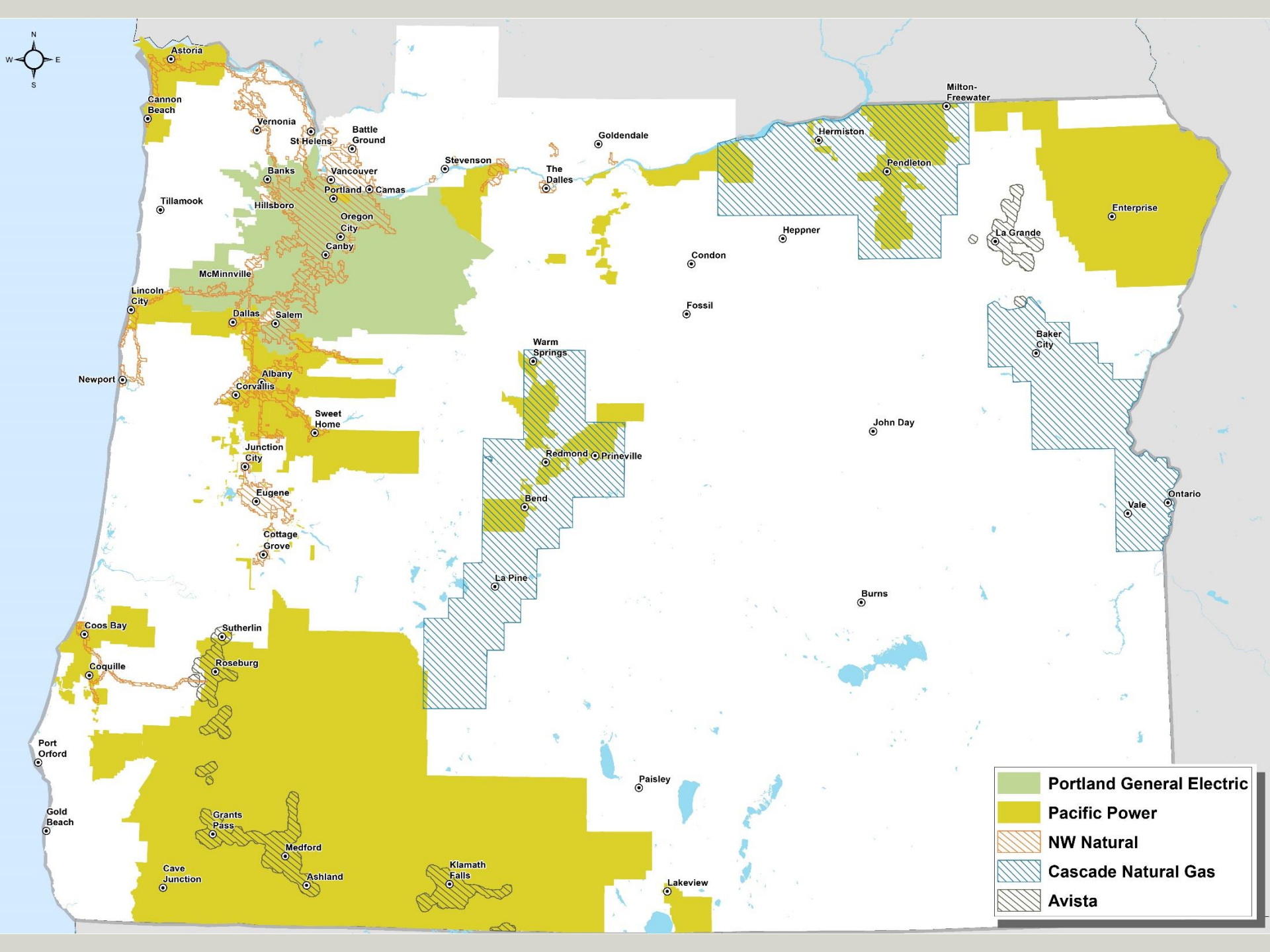
Independent
nonprofit

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.



COOLING SOLUTIONS

Choosing the right home cooling solution

<https://www.energytrust.org/residential/diy>



COOLING SOLUTIONS

How to read a heat pump contractor bid

Skill level: Easy



SEASONAL

Tips for staying cool without air conditioning

Skill level: Easy



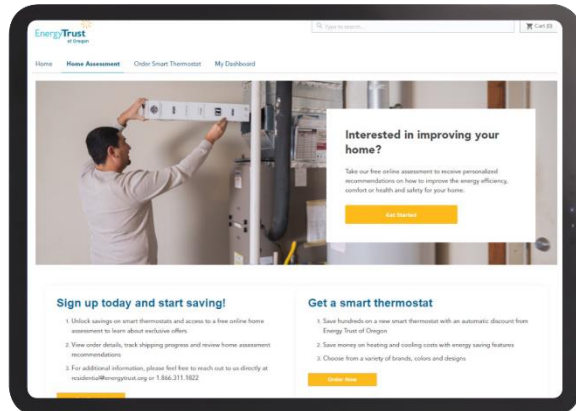
COOLING SOLUTIONS

Tips for central air conditioner maintenance

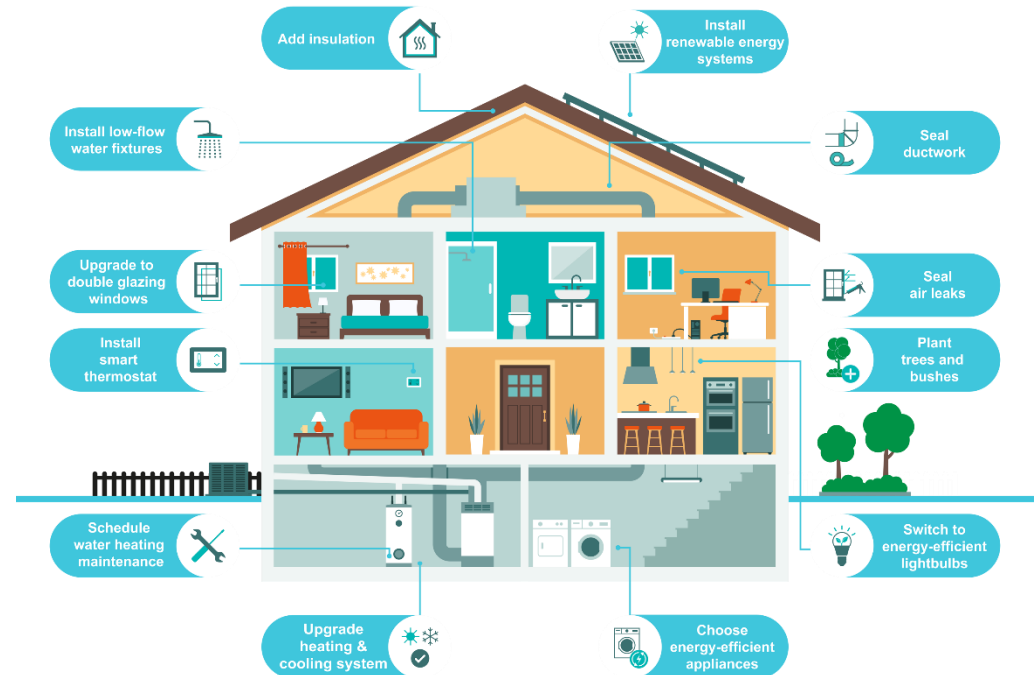
Skill level: Easy

Online Home Assessment

ENERGY-EFFICIENT HOME IMPROVEMENTS



Online Home Assessment



Take our free online home assessment
www.energytrust.org/assessment

Special Offers and Services

No-Cost Offers	Energy Trust Discounts
Free Duct Sealing (manufactured home residents only)	Covers full cost
Online Home Energy Assessment	Free
Lower-Cost Offers	
Smart Thermostat	\$80
Attic Insulation ~ 65% off*	Up to \$1.25/sq ft
Attic Insulation ~ 75% off* (rental property or moderate-income residents only)	Up to \$1.50/sq ft
Ductless Heat Pump Promotions ~ 30-50% off*	Manufactured Homes: \$3,500 Rentals: \$1,500
Ducted Heat Pump Promotion ~ 50% off*	Manufactured Homes \$4,000



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

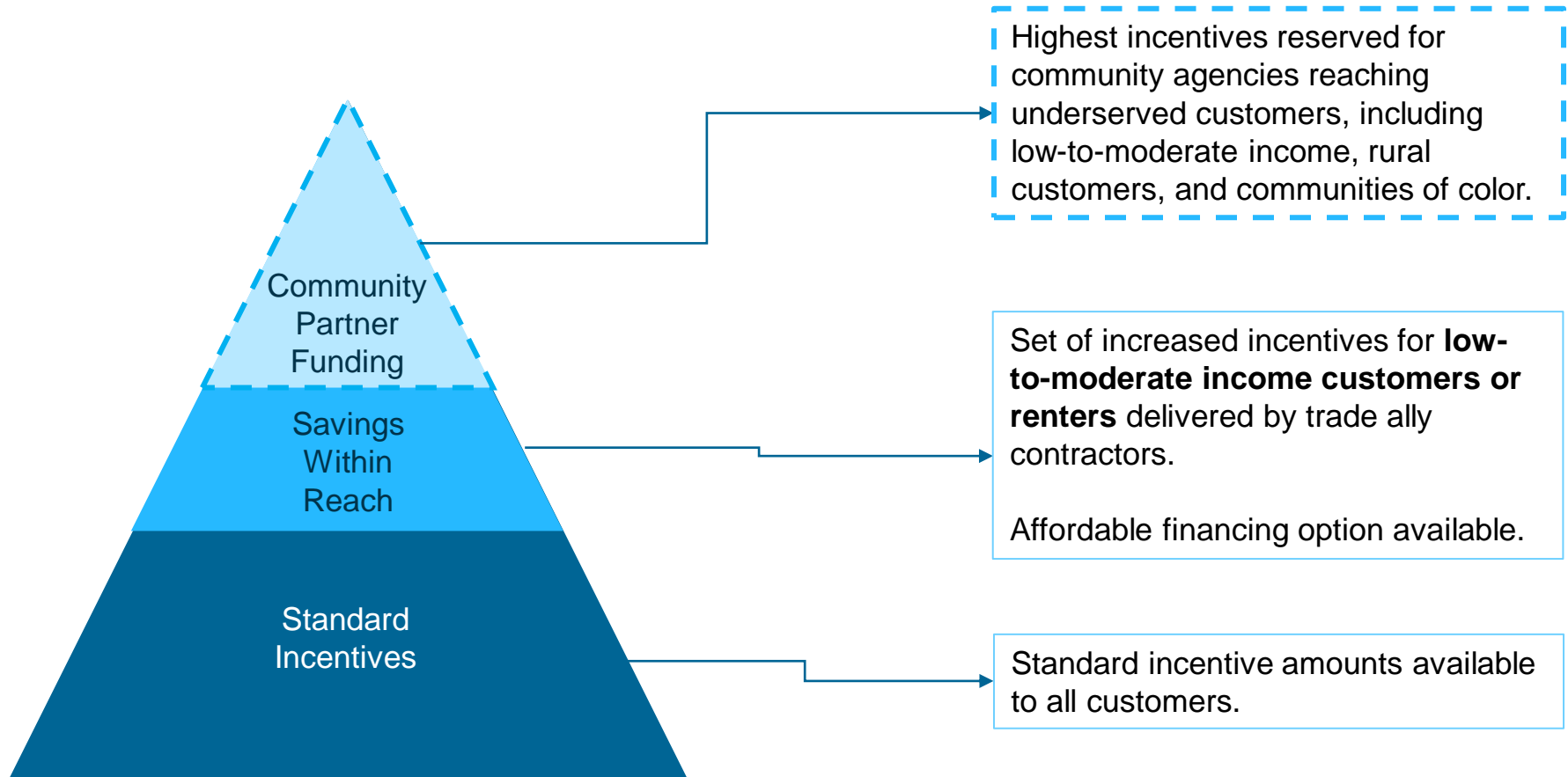
I need help with

Find company



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



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

Oregon Cash Incentives for Single-Family Homes	
SERVING CUSTOMERS OF PORTLAND GENERAL ELECTRIC, PACIFIC POWER, NW NATURAL, CASCADE NATURAL GAS AND AVISTA	
WINDOWS + INSULATION	Insulation Qualifications apply for existing insulation conditions and for gas-heated homes. Incentive maximum applies for floor and attic insulation upgrades. \$0.25 per square foot: Attic/ceiling \$0.30 per square foot: Floor, wall, knee wall, rim joist Self-installation: Attic/ceiling, knee wall and floor insulation can be self-installed. Call us at 1.866.368.7878 before beginning work to receive pre-approval. Rental homes: Increased incentives are available to the property owner for attic/ceiling, floor and wall insulation for qualifying single-family rental properties.
	Windows \$4 per square foot of windows installed, U-Value 0.27 or less \$1.75 per square foot of windows installed, U-Value 0.28-0.30
HEATING	Direct-Vent Gas Fireplace \$250, 75% fireplace efficiency (FE), or greater \$150, 70-74.9% FE
	Gas Furnace \$550, 90% AFUE or greater, available for single-family rental properties only
	Ductless Heat Pump \$800 per residence, for homes replacing electric resistance heat, HSPF 9.0 or greater
	Heat Pump \$700, HSPF 8.5 or greater, for homes upgrading from an electric furnace, baseboard, wall heater or ceiling heat
	Heat Pump Controls \$250, home must be heated primarily by an electric heat pump and electric forced-air furnace
	Smart Thermostat \$50, select smart thermostat models qualify, home must be primarily heated with a forced-air furnace (electric or gas), or an electric heat pump with electric furnace backup

**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 INCOME GUIDELINES

Household size	Gross annual income	
	Min.	Max.
1 person	\$27,180	\$58,688
2 people	\$36,620	\$76,744
3 people	\$46,060	\$94,802
4 people	\$55,500	\$112,860
5 people	\$64,940	\$130,918
6 people	\$74,380	\$148,976
7 people	\$83,820	\$152,362
8 people	\$93,260	\$155,746

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



RESIDENTIAL FACT SHEET

SAVINGS WITHIN REACH
CASH INCENTIVES MAKE ENERGY EFFICIENCY AT HOME EASIER

No matter your budget, it's possible to make changes that lower your utility costs and improve the comfort and energy performance of your home. To help make home energy-saving upgrades more affordable, Energy Trust of Oregon offers increased cash incentives for income-qualified households through Savings Within Reach.

**SAVINGS WITHIN REACH
INCOME GUIDELINES**

Household size	Gross annual income	
	Min.	Max.
1 person	\$23,095	\$54,340
2 people	\$30,301	\$69,660
3 people	\$32,307	\$69,730
4 people	\$44,413	\$75,530
5 people	\$51,519	\$83,760
6 people	\$58,625	\$89,880
7 people	\$59,550	\$96,120
8 people	\$61,290	\$102,360

INSULATION

Energy-efficiency upgrade	Maximum Incentive
Attic insulation	\$0.50 per square foot
Wall insulation	\$0.50 per square foot
Floor insulation	\$0.40 per square foot

HEATING

Energy-efficiency upgrade	Maximum Incentive
Ductless heat pump with a minimum efficiency of HSPF 9.0	\$1,000
Heat pump with a minimum efficiency of HSPF 8.5 (when replacing an existing electric resistance heat furnace)	\$1,000
High-efficiency gas furnace with a 90 percent AFUE or greater	\$550

WATER HEATING


Energy-efficiency upgrade	Maximum Incentive
Heat pump water heater, Tier 3 (any tank size) (when replacing an existing electric water heater)	\$375

Energy Trust of Oregon

**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



**MAKE ENERGY-SAVING
UPGRADES EASIER TO SWING**

**AFFORDABLE FINANCING REPAID THROUGH YOUR
ENERGY BILL**

If you qualify for Savings Within Reach, you can reduce upfront expenses and start saving energy right away with incentives and affordable financing solutions designed just for you.

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

EnergyTrust
of Oregon

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)

Portland Metro

Verde

Community Energy
Project

African American
Alliance for
Homeownership

Renovate PDX

Washington County
Office of Community
Development

Portland Community
Reinvestment
Initiatives

Central/Southern OR

Lake County
Resources Initiative

NeighborWorks
Umpqua

Warm Springs
Housing Authority

Indigenous Helpers

Illinois Valley
Community
Development
Organization (IVCDO)

Eastern Oregon

EUVALCREE

Sustainable Living
Center

Wallowa Resources

Willamette Valley

Seeds for the Sol


Polk CDC

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.	Approximate Final Cost After Discount*
	Attic/Ceiling, Floor or Wall Insulation See other side for more details.	\$0
	Ductless Heat Pump - Income Qualified 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 income qualifications.	\$0

	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.	Energy Trust Discounts*	Approximate Final Cost After Discount*
	Ductless Heat Pump Must replace electric resistance heat (like an electric furnace, baseboard heat, or wall cadets) in a primary living space. No income qualification required.	Up to \$3,500	\$1,000-\$2,000
	Ducted Heat Pump For homes upgrading from an electric furnace.	\$4,000	\$2,000-\$3,000
	High-Efficiency Gas Furnace Minimum 90% Annual Fuel Utilization Efficiency (AFUE).	\$1,400	\$3,500-\$4,500
	Smart Thermostat Select models qualify. Homes must be primarily heated with a forced air furnace (electric or gas) or an electric heat pump.	\$150	\$200-\$250

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.

**Energy Trust
Discounts***

**Approximate Final
Cost After Discount***

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.

**Energy Trust
Discounts***

**Approximate Final
Cost After Discount***

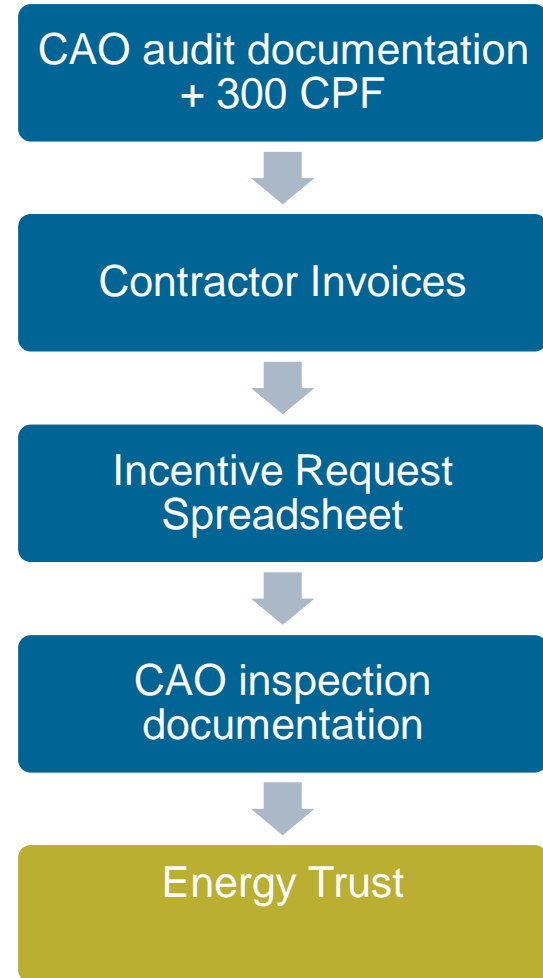
Hybrid Water Heater For homes replacing storage tank water heaters.	\$240	\$1,750-\$2,750
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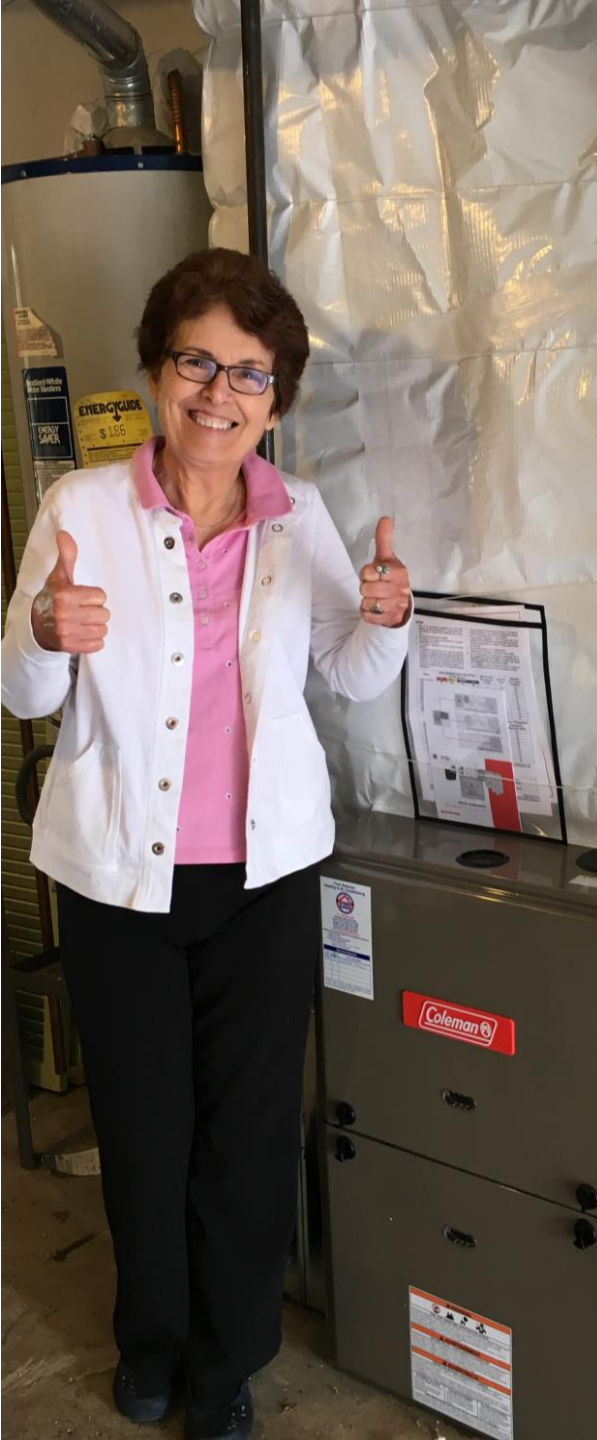
Collaboration with Community Action

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





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

Housing Type	Units Served	Incentives Paid
Single-family	50	\$283,434
Multifamily	104	\$531,279
Total	154	\$814,713

- Average Household size: 2.1 persons
- Average Household Gross Income:
 - \$915 (Monthly)
 - \$10,980 (Annual)

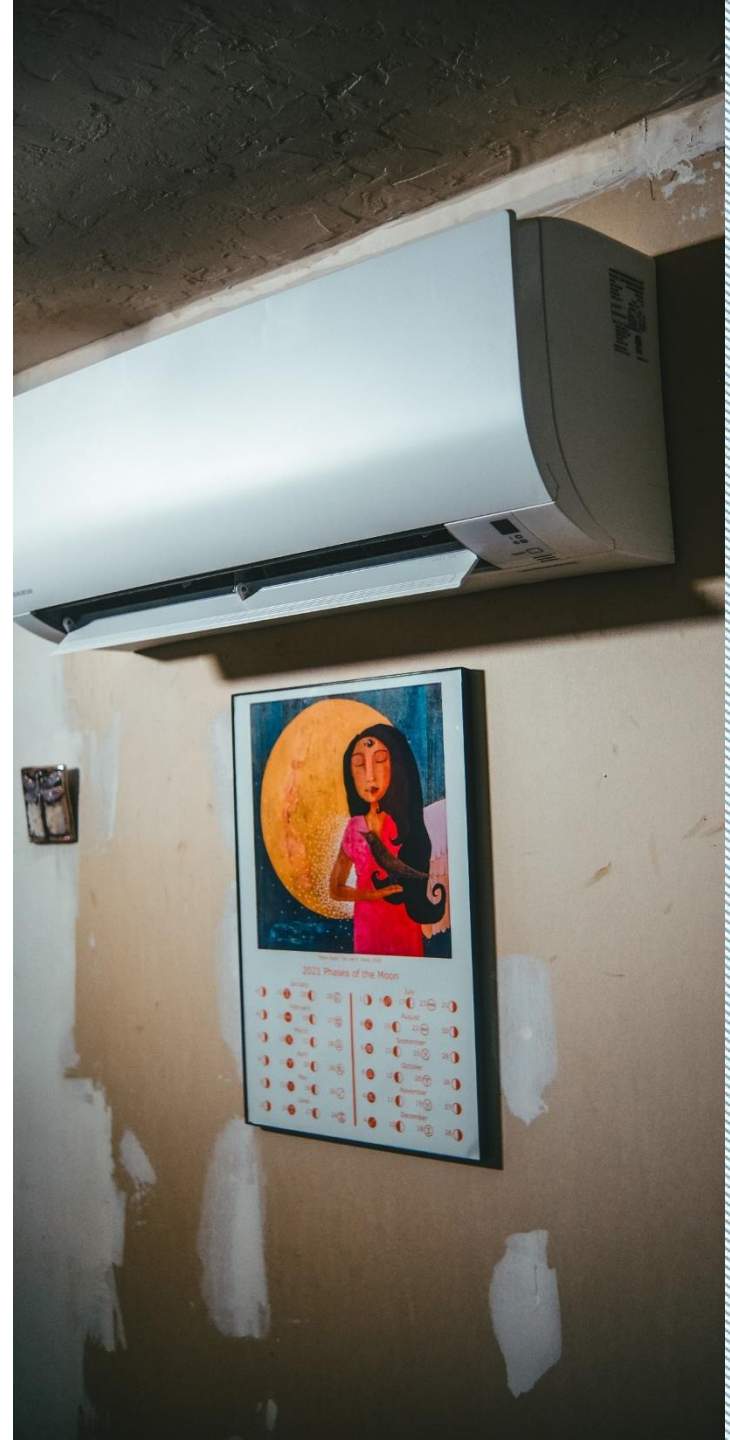


No-Cost DHP Offer

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

Number of Indoor DHP Heads	Maximum Incentive
One	\$4,800
Two	\$7,200




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



 NO-COST OFFERS You may be eligible for Energy Trust discounts that may cover the full cost of the following energy upgrades.	
	Approximate Final Cost After Discount*
Attic/Ceiling, Floor or Wall Insulation See other side for more details.	\$0
Ductless Heat Pump - Income Qualified 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.	\$0

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/>