Spring Trade Ally Forums
April 2018
## Breakout Topics & Locations

### Breakout Session A: 9:40 – 10:40

<table>
<thead>
<tr>
<th>Cascade A</th>
<th>Cascade B</th>
<th>Cascade C</th>
<th>Cascade D</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tawney Reader, NMLS, Senior Consumer Lender, Craft3</td>
<td>Shawn O’Neill</td>
<td>Jeni Hall, Senior Project Manager – Solar, Energy Trust</td>
<td>Damon Runberg, Regional Economist, Oregon Employment Dept.</td>
</tr>
</tbody>
</table>
# Breakout Topics & Locations

## Breakout Session B: 11:00 – 12:00

<table>
<thead>
<tr>
<th>Cascade A</th>
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<tbody>
<tr>
<td>Heat Pump Sizing and the use of Smart Thermostats as Quality Control</td>
<td>Oregon Solar Energy Industries Association (OSEIA)</td>
<td>Existing Buildings Program Overview</td>
</tr>
<tr>
<td>Bruce Manclark, Training Director, CLEAResult</td>
<td>Jeni Hall, Senior Project Manager – Solar, Energy Trust of Oregon</td>
<td>Nick Dreves, Outreach Manager</td>
</tr>
</tbody>
</table>
Who is here this morning?
Energy Trust Highlights
Spring Trade Ally Forums
April 2018
2017 Accomplishments: Statewide

64.3 aMW saved

Most savings to date

$102 million+
incentives paid

6.8 million
annual therms saved

Ties most savings to date

4.42 aMW
renewable energy generated

56,000 sites served
2017 Accomplishments: Deschutes County

$3M incentives paid

3,100 total sites served

14.7M kWh saved

321K therms saved
2017 Accomplishments: Crook, Jefferson

$676K incentives paid

556 total sites served

2.5M kWh saved

53K therms saved
2018: What’s Ahead

• New-and-improved Find-a-Contractor tool

• Trade ally survey
Growth Areas

• Small business sector
  • Small sites = >20,000 sq. ft.
  • 32 percent have worked with Energy Trust
  • 70 percent of small sites unserved

• Large business sector
  • 30 percent remaining market share

• Medium business sector
  • 46 percent remaining market share
Tom Beverly
Trade Ally Manager,
Energy Trust of Oregon
2017 Residential Home Retrofit & EPS™ New Construction
2017 Home Retrofit Drivers: Electric

- **2015**
  - 74% HVAC
  - 6% Water heating
  - 12% Weatherization
  - 7% Windows

- **2016**
  - 73% HVAC
  - 4% Water heating
  - 16% Weatherization
  - 7% Windows

- **2017**
  - 74% HVAC
  - 9% Water heating
  - 10% Weatherization
  - 7% Windows
EPS Market Share

- 2015: OR market share 30%, EPS homes 2,521
- 2016: OR market share 35%, EPS homes 3,335
- 2017: OR market share 38%, EPS homes 3,096

EPS homes and market share trends from 2015 to 2017.
Central Oregon Trends
Home Retrofit – Central Oregon (projects)
Home Retrofit – Central Oregon (incentives)
Home Retrofit – Central Oregon (savings)

- Ductless heat pump
- Heat pump replacement
- Heat pump upgrade
- Heat pump commissioning
- Insulation
- Windows
- Heat pump water heater

Reportable kWh

- Gas furnace
- Windows
- Insulation
- Gas fireplace
- Tank hot water

Reportable therms
Number of Homes by % improvement and home configuration: Central Oregon
2018 Priorities
2018 Priorities

- Expand Participation
  - Targeted Marketing
  - New Opportunities: Manufactured Homes
- Efficient Controls
- Supply-Chain Offerings
Existing Multifamily Program
Trade Ally Forums
April 2018
Multifamily Prescriptive Incentive Trends

1,804 prescriptive projects in 2017
$1.7M prescriptive incentives paid
2017 Existing Multifamily Savings

Prescriptive Electric Savings
- Appliances: 87,648 kWh
- Water Heaters: 109,785 kWh
- Insulation: 168,357 kWh
- Windows: 1,369,178 kWh
- HVAC: 2,371,803 kWh

Prescriptive Gas Savings
- Insulation: 1,834 therms
- Appliances: 2,073 therms
- Windows: 5,730 therms
- HVAC: 8,250 therms
- Water Heaters: 13,774 therms
- Boilers: 80,190 therms

2017 Electric Savings by Track
- Lighting: 39%
- Direct Install: 33%
- Prescriptive: 25%
- Custom: 3%
- Total: 16,052,407 kWh

2017 Gas Savings by Track
- Prescriptive: 62%
- Direct Install: 24%
- Custom: 14%
- Total: 181,642 therms
Central Oregon - Prescriptive Incentive Trends


- **2015**: $40,000
- **2016**: $55,000
- **2017**: $100,000

By category:
- HVAC: $15,000, $20,000, $30,000
- Windows: $5,000, $10,000, $20,000
- Insulation: $10,000, $10,000, $20,000
- Appliances: $10,000, $10,000, $20,000
- Water Heaters: $5,000, $5,000, $20,000]
2018 Priorities
2018 Priorities

• **Expand** participation across all territories served by Energy Trust

• **Enhance** relationships with trade allies, distributors and manufacturers

• **Optimize** program offerings to provide actionable services to participants and trade allies

• **Utilize** data driven tools to identify areas of targeted outreach

• **Seek** new savings opportunities by conducting field tests and pilots
Thank you
Kate Scott, Existing Multifamily Program Manager
kate.scott@energytrust.org
ADDITIONAL SLIDES
Multifamily Electric Savings – Statewide

2017 Electric Savings by Track

<table>
<thead>
<tr>
<th>Track</th>
<th>Percentage</th>
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<tr>
<td>Custom</td>
<td>3%</td>
</tr>
<tr>
<td>Direct Install</td>
<td>33%</td>
</tr>
<tr>
<td>Lighting</td>
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<td>25%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>16,052,407 kWh</strong></td>
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</table>

Prescriptive electric projects in 2017

| Projects          | 2790 |

Incentives paid for prescriptive electric projects in 2017

$3,250,301
Multifamily Gas Savings – Statewide

2017 Gas Savings by Track

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<tr>
<td><strong>Total</strong></td>
<td><strong>62%</strong></td>
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Incentives paid for prescriptive gas projects in 2017: $592,807

Prescriptive gas projects in 2017: 611
2017 Prescriptive Savings - Statewide

- HVAC: 2,371,803 kWh
- Windows: 1,369,178 kWh
- Insulation: 168,357 kWh
- Water Heaters: 109,785 kWh
- Appliances: 87,648 kWh

- Boilers: 80,190 therms
- Water Heaters: 13,774 therms
- Appliances: 2,073 therms
- Insulation: 1,834 therms
- Windows: 5,730 therms
- HVAC: 8,250 therms
Prescriptive Incentives - Statewide

Prescriptive projects submitted in 2017

Top Prescriptive Measures 2017

Ductless heat pumps – 1, 1.5 & 2 ton
Windows – stacked structure single pane
Condensing boiler
Condensing tank water heater
2015-2017 Incentives by sector – Statewide

Top Measures 2015-2017
1. Windows
   • $2,023,350
2. HVAC
   • $1,637,750
3. Boilers
   • $512,231
Incentives by Market Sector 2015-2017

- Market Rate: 52%
- Condo/Townhouse: 14%
- Affordable: 14%
- HOA: 6%
- Assisted Living: 2%
- Campus Living: 12%
Central Oregon
Prescriptive Electric Savings – Central OR

<table>
<thead>
<tr>
<th>Year</th>
<th>Electric Savings (kWh)</th>
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<tbody>
<tr>
<td>2015</td>
<td>195,975</td>
</tr>
<tr>
<td>2016</td>
<td>194,280</td>
</tr>
<tr>
<td>2017</td>
<td>335,293</td>
</tr>
</tbody>
</table>

Legend:
- Other
- HVAC
- Insulation
- Water Heaters
- Windows
2015-2017 Incentives by sector – Central OR

Top Measures 2015-2017
1. HVAC
   • $124,019
2. Windows
   • $47,707
3. Insulation
   • $18,141

2015-2017 Sector Incentives – Central OR

- HVAC: $124,019
- Windows: $47,707
- Insulation: $18,141