

Central OR

Central Breakout Housekeeping

- Breakout: 45 minutes
- Air Quality CEU conducted after the breakout
- To ask a question, unmute yourself, add it to the chat or raise your hand
- If you want to join another session, leave the room (bottom right screen) and the host can reassign you
- We can mute you, but only you may unmute yourself
- If you are dialing in on your phone only and want to mute or unmute yourself, press *6
- Presenters: Andrew Shepard, Nate Merrill, Mike Lillesand, Dan St Germain

Central OR Agenda

- In-Depth 2021 Incentive Changes
- 2020 Opportunities and Performance
 - 0.24 Windows Tier
 - Manufactured Homes HP Promo
 - Rental Incentives
 - DHP in Rentals Promo
- Multifamily Program Updates
 - Expanding Participation in small multifamily
 - Multifamily Participation trends
 - Multifamily Market Snapshot
 - Oregon COVID Response
- EPS New Construction
 - COVID Impacts on new homes
 - 2021 Cash Incentives
 - Early Design Assistance
 - Additional offerings in 2020
- Central AC AHRI Review

2021 Heat Pump Conversion Changes

Qualified Primary Heating Source Change:

Primary Heating Source	Cost Effective?	Qualified?	Requires Cut In's?
Electric Furnace	Yes	Qualified	No
Baseboard heat	No	Not Qualified	Yes (Increases Cost)
Wall/Ceiling Heat	No	Not Qualified	Yes (Increases Cost)

Requirement Addition:

- Auxiliary heat lockout must be completed on all Heat Pump Conversions

January 1, 2021 – March 31, 2021	April 1, 2021 – December 31, 2021
\$950	\$700

Heat Pump Advanced Control Changes

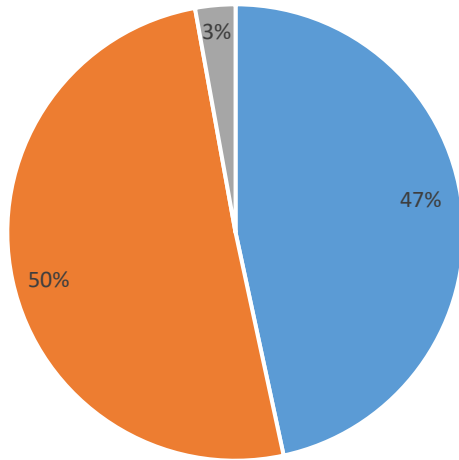
Install Scenario	Qualified?
Heat Pump replacing Heat Pump	Yes
Adding auxiliary lockout to existing heat pump	Yes
Heat pump conversion from electric furnace	No

- Heat Pump Advanced Controls may no longer be stacked with Heat Pump Conversions, as auxiliary lockout will be required for Heat Pump Conversions.

2020 Opportunity and Performance

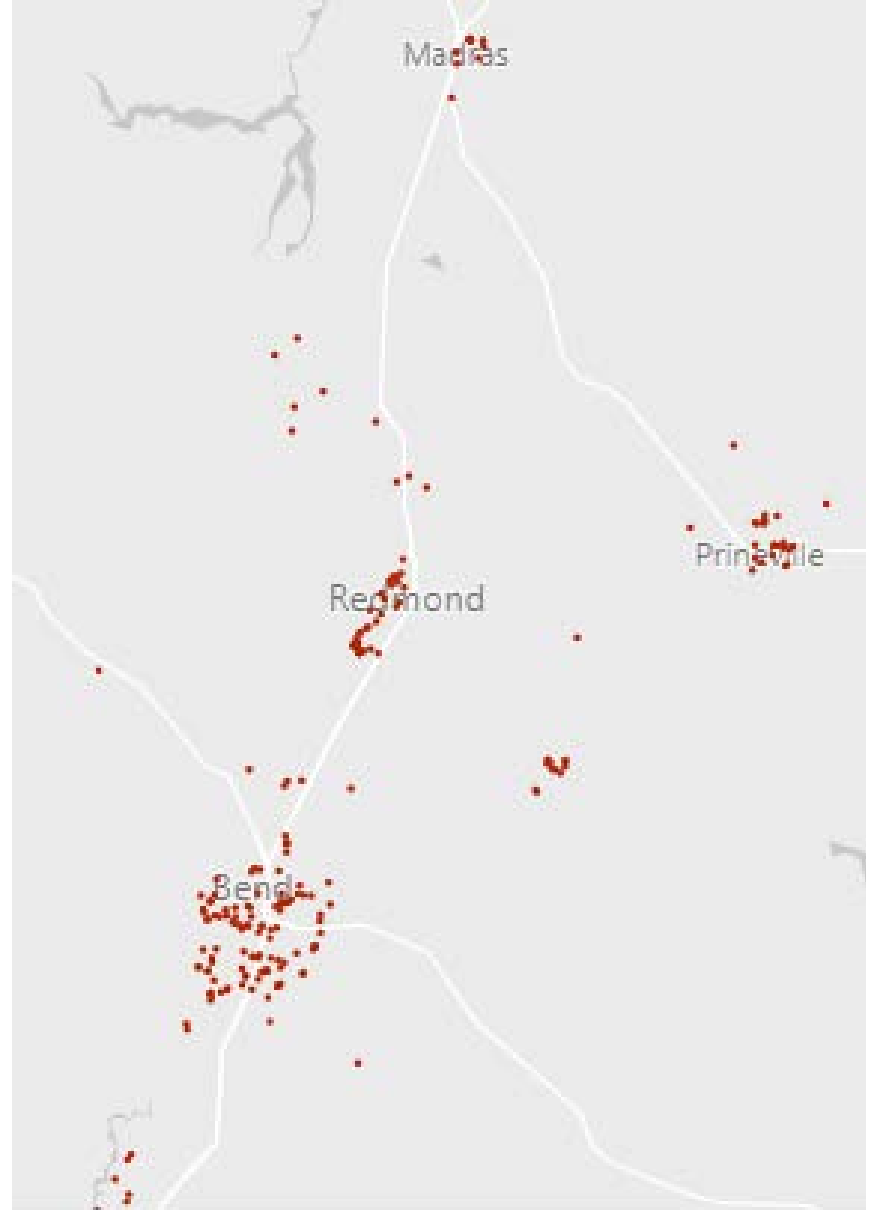
Windows – Central Oregon

- New Windows Tier: \$6 in OR



■ Single Family ■ New Homes ■ Manufactured Homes

- Majority of 0.24 windows installed in New Homes in Central OR



New 0.24 Windows Tier
Install Map

EnergyTrust
of Oregon

Manufactured Homes Heat Pump Promotion

RFQ Open:

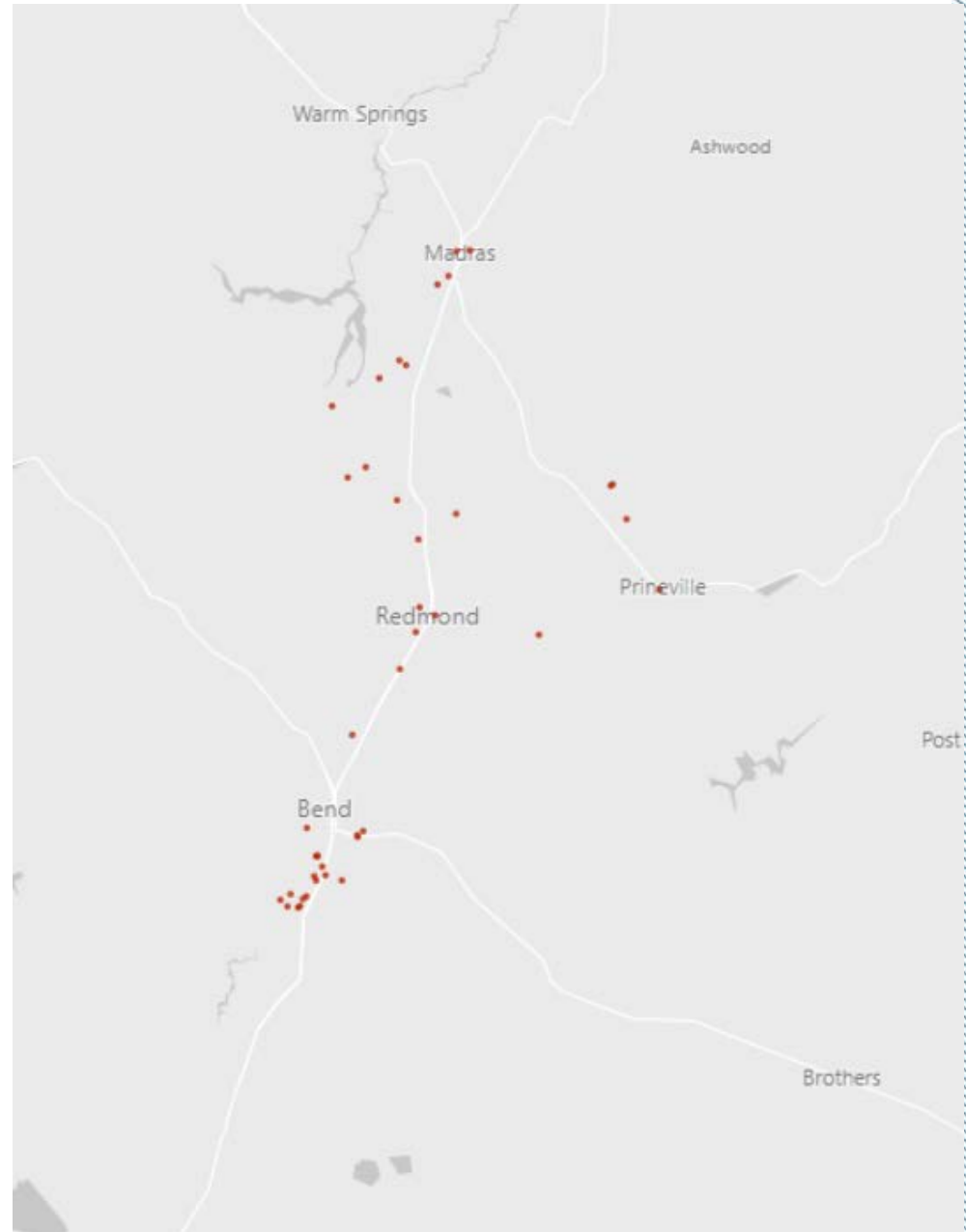
- October 16, 2020-November 16, 2020
- Home Retrofit Trade Allies
- \$2,500 for DHP, \$3,000 for HP in Manufactured Homes

Selection Criteria: 2021

- Pricing
- History of serving Manufactured Homes communities
- Ability to reach diverse customer base

Manufactured Homes Heat Pump Promotion – Central Oregon

- 2020 Regional Results
 - 8 DHP
 - 30 HP
- Statewide:
 - 91 DHP
 - 349 HP



Rental Incentives: Single-Family Homes

- Increased Incentives for Single-Family Rentals
- Trade Ally Requirements:
 - Enrolled in Instant Incentives
 - Talk to your account manager to enroll
- Customer Requirements:
 - Non-owner Occupied, single-family rental properties
 - Oregon & Washington

OR Rental Incentive Amounts: Single-Family

Upgrade	Rental Incentive	Incentive Timeline
Ductless Heat Pump	\$1,000	2021
Heat Pump	\$1,000	2021
Extended Capacity Heat Pump	\$1,650	2021
Gas Furnace	\$550 \$1,000	Bonus through: March 31, 2021
Heat Pump Water Heater	\$270	2021
Smart Thermostat	\$100	2021
Attic Insulation	\$0.50 \$1.25 per square foot	Bonus through: March 31, 2021
Wall Insulation	\$0.50 per square foot	2021
Floor Insulation	\$0.40 per square foot	2021

- *Incentive availability and timeline subject to change

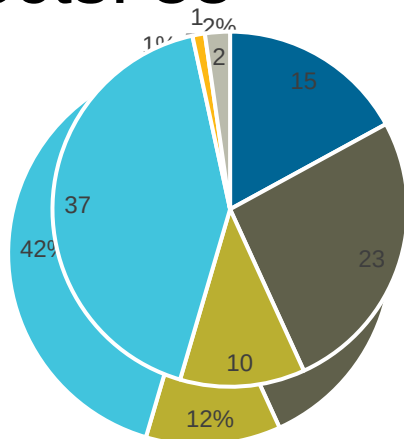
WA Rental Incentive Amounts: Single-Family

Upgrade	Rental Incentive	Incentive Timeline*
Gas Furnace	\$550 \$1,000	Bonus through: March 31, 2021
Gas Tankless Water Heater	\$200 \$400	2021
Smart Thermostat	\$100	2021
Attic Insulation	\$0.60 \$1.25 per square foot	Bonus through: March 31, 2021
Wall Insulation	\$0.60 \$0.75 per square foot	Bonus through: March 31, 2021
Floor Insulation	\$0.60 \$0.75 per square foot	Bonus through: March 31, 2021

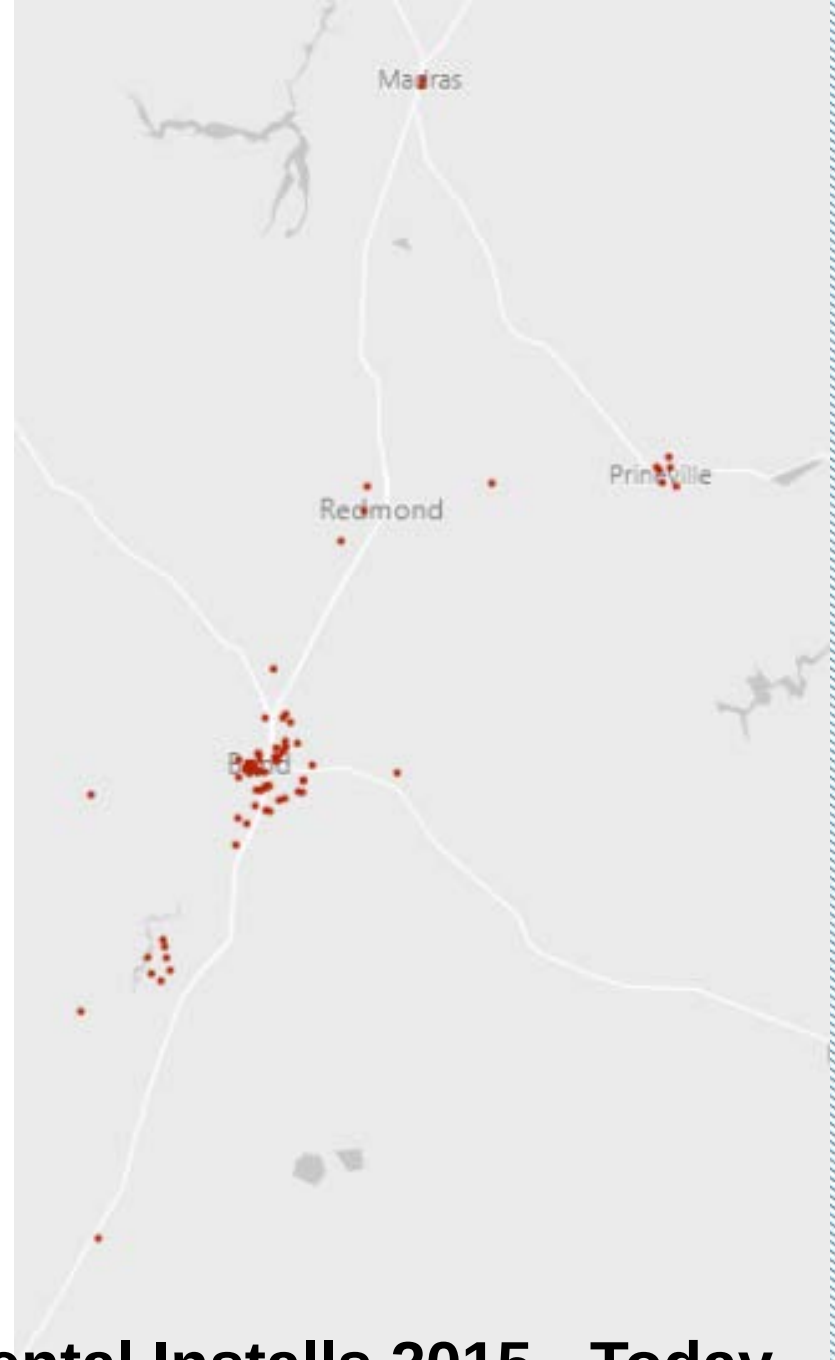
- *Incentive availability and timeline subject to change

Central OR Single-Family Rental Incentives

- Central OR Single-Family Rentals: 11,491
- Central OR Single-Family Rental Projects: 88



■ Ceiling insulation
 ■ Floor insulation
 ■ Gas furnace
 ■ Heat pump replacement
 ■ Ductless heat pump
 ■ Wall insulation
 ■ Gas furnace
 ■ Heat pump replacement
 ■ Ductless heat pump
 ■ Floor insulation
 ■ Wall insulation



Rental Installs 2015 - Today

DHP in Rentals Promo

- RFQ Open: October 16, 2020 - EO 2021
 - \$1,750 - \$2,000 DHP Incentive
 - Non-Owner-Occupied Rentals
 - Single-Family Rentals and Small Multifamily Rentals
 - Price Capped offering; customer out of pocket cost max \$2,500
- Requirements
 - Home Retrofit or Multifamily Trade Ally
 - Enrolled in Home Retrofit Instant Incentives
 - Meet Program 9 HSPF Requirements per AHRI
 - Meet price caps
- 2020 participants will need to reapply via the 2021 RFQ.

Multifamily Market Update

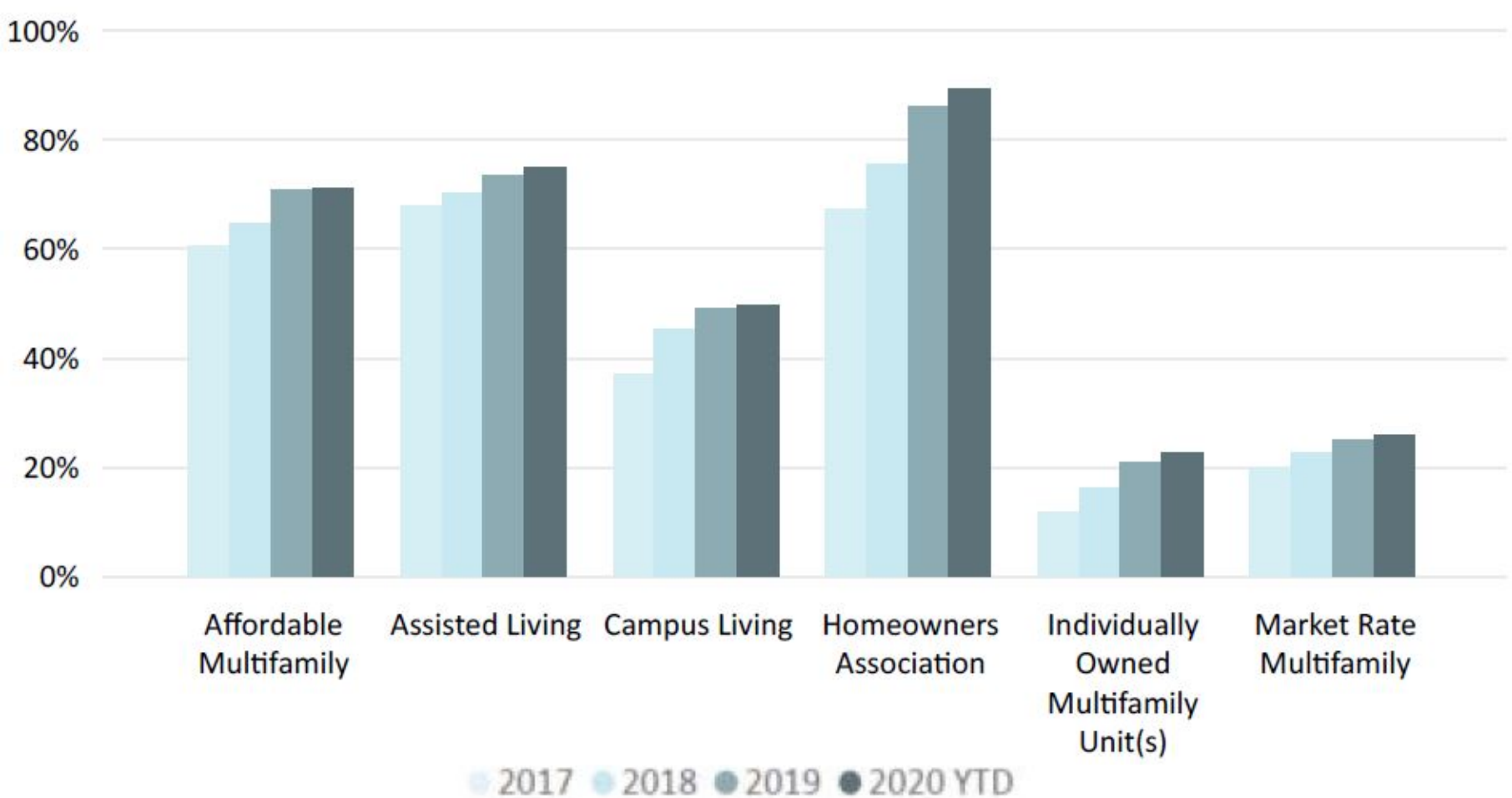
Expanding participation in small multifamily

- Opportunity identified in small multifamily
 - duplex, triplex, fourplex
 - Doubled participation from 2017-2020
 - 10% to 20% served
- Offerings tailored for small multifamily
 - DHP Rental Promotion
 - \$1,000 bonus DHP incentive
 - Up to \$1.25/sq. ft. insulation
 - \$1,000 gas furnace
- Targeting rural areas



Multifamily participation trends

Percentage of total eligible multifamily market served
by market type from 2017-2020



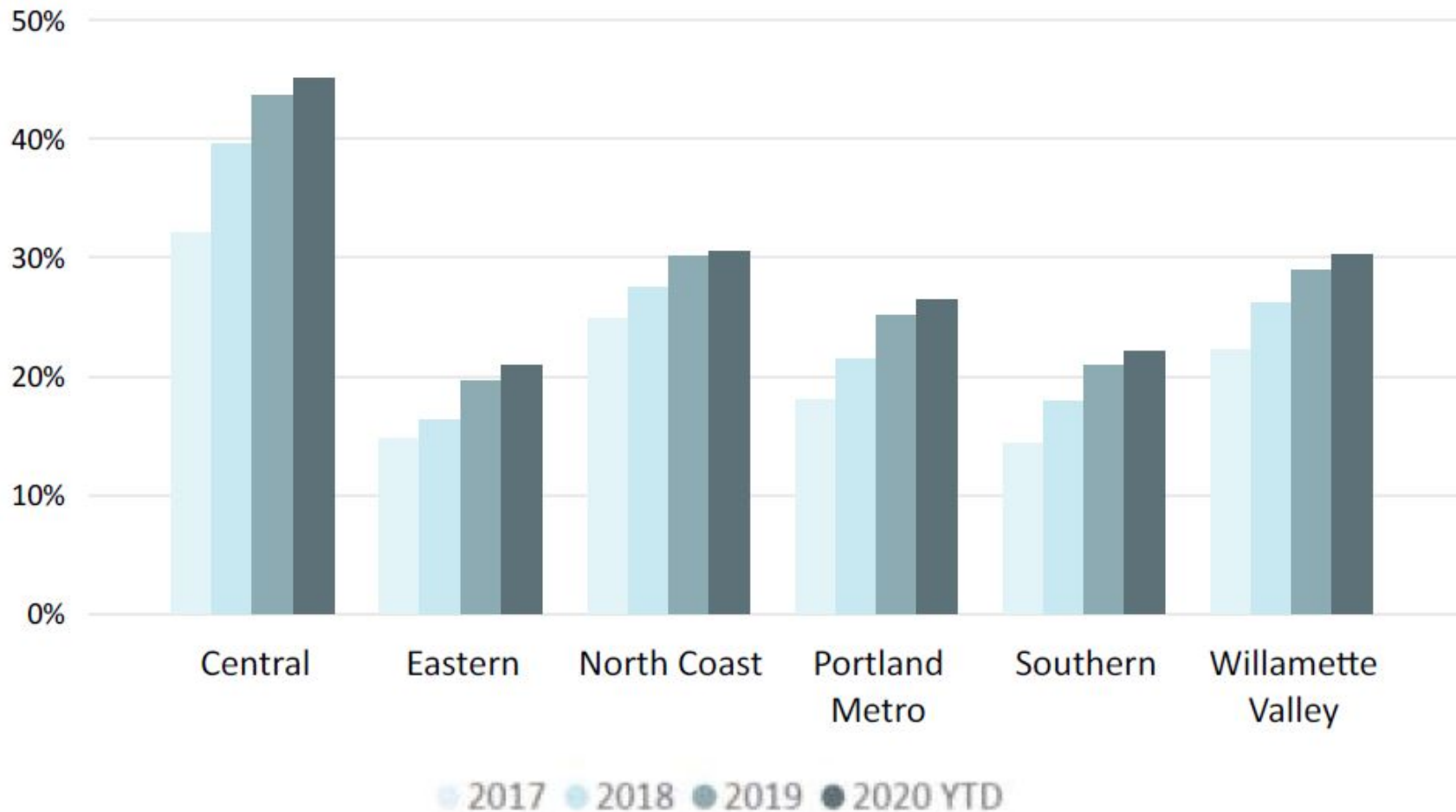
Multifamily participation trends

Percentage of total eligible multifamily market served
by property size from 2017-2020



Multifamily participation trends

Percentage of total eligible multifamily market served
by region from 2017-2020



Multifamily Market Snapshot

- Increasing number of tenants not able to pay rent
- New multifamily construction slowing
- Vacancies expected to rise next year as eviction protections expire
- Assisted living retrofit market limited



Oregon COVID Response

- Changes to Eviction Moratoria
 - Eviction protection for tenants
- Executive Order extends "Emergency Period"
 - Eviction protection through December 31st
- Tenants have until March 31st, 2021 to pay off the debts from April 1st to September 31st
- Multnomah county has specific guidelines



Portland Only – Residential Infill Project Approval

- City Council approved in August 2020
- Zoning reform for Portland's residential neighborhoods
- Opens door for more housing options
 - Single family lots converted to multifamily
 - Four to six dwelling units per lot
 - Six dwellings allowed if half are affordable housing





EPS New Construction

Energy Trust of Oregon

2020



Covid impacts on the new homes industry

- Supply shortages
 - Air conditioning units
 - Lighting fixtures
 - Appliances
- Lumber price increases
- Skilled labor shortage
- Construction delays due to staggered trades
- Building industry slowly getting back to business as usual
- Low interest rates are creating higher demand

Available cash incentives in Oregon (2021)

- \$1,123 - \$5,223 cash incentives to help builders move beyond code
- \$750 net zero incentive
- \$300 - \$1,889 verification incentive
- \$250 affordable housing verification incentive
- \$200 solar ready incentive
- \$200 energy smart homes incentive
- Varying incentives with solar installs
- Varying incentives for early design and solar design assistance

Early design assistance (EDA) meetings are your first concrete step!

“90% of your energy decisions are made before a hammer hits a nail” – John Tooley

EDA = Pre-construction meeting for design review with builder, verifier, verifier account manager and subcontractors

Opportunity to:

- Maximize energy efficiency and EPS incentives
- Strengthen communication between subcontractors
- Integrate solar/solar ready into the design

Additional Offerings in 2020

In 2020, builders that are part of Energy Trust of Oregon's EPS New Construction offering can take their new homes to the next level with two new incentive packages:

- 1. Net Zero Homes:** Include an installed solar PV system that can offset a home's entire electric load
- 2. Energy Smart Homes:** Include appliances and equipment that are smart grid interactive, making it possible for customers to participate in utility programs designed to lower energy usage during peak periods—now or in the future

Central AC AHRI Review

Central AC Review

- Central Air Conditioner qualifications review
 - How to verify SEER compliance using Qualifying Products List (QPL)
 - How to verify EER compliance using AHRI
 - Ensuring application is accurate and complete

Equipment	Incentive	Requirements
Central air conditioner	\$250	Minimum nominal Seasonal Energy Efficiency Rating (SEER) of 15 or greater for the outdoor unit, and a minimum total system Energy Efficiency Rating (EER) of 12 or greater Ask your contractor to verify the outdoor unit can be found on the qualifying products list and that the total system achieves a minimum 12 EER rating via the AHRI website to ensure your installation qualifies.

Central AC Review

- SEER Requirements
 - Verify **outdoor unit** meets 15 SEER requirement by referencing Energy Trust of Oregon Qualifying Products List

Requirements

Minimum nominal Seasonal Energy Efficiency Rating (SEER) of 15 or greater for the **outdoor unit**, and a minimum total system Energy Efficiency Rating (EER) of 12 or greater

Ask your contractor to verify the outdoor unit can be found on the **qualifying products list** and that the total system achieves a minimum 12 EER rating via the **AHRI** website to ensure your installation qualifies.

Central AC Review

- QPL may not include all qualifying units. Contact Energy Trust Residential team if a model appears to be missing.

Qualifying Central Air Conditioning Outdoor Units

Residential and Existing Multifamily
Effective February 1, 2020



Models listed below are known to meet the manufacturer-listed minimum 15 SEER requirement and the minimum total system EER of 12 or greater for central air conditioning outdoor units. If you have questions about model eligibility or to verify eligibility of a model not found on this list, please contact us at residential@energyst.com for single family homes and multifamily@energyst.com for multifamily residences.

Manufacturer	Model Name	Model Number
American Standard	SILVER 16	4A7A6, 4A7L6
American Standard	GOLD 17	4A7C7, 4A7A7
American Standard	PLATINUM 18	4A7V8
American Standard	PLATINUM 20	4A7V0
Amana	AVXC20	AVXC20
Amana	ASXC18	ASXC18
Amana	ASXC16	ASXC16
Amana	ASX16	ASX16
Bryant	LEGACY	105A, 116B, 106A
Bryant	PREFERRED	126B, 126CNA, 127A
Bryant	EVOLUTION	186B, 187B, 187BNC, 180C, 180B, 189BNV
Carrier	COMFORT 15, COMFORT 16	24AAA5, 24ABC6, 24AAA6
Carrier	PERFORMANCE 16, PERFORMANCE 17	24APB6, 24ACC6, 24ACB7
Carrier	INFINITY 16, INFINITY 17, INFINITY 19, INFINITY 20, INFINITY 21	24ANB6, 24ANB7, 24VNA9, 24VNAO, 24ANB1
Coleman	LX SERIES	CC7, CC17
Coleman	ECHELON	AC21, AC19
Daikin	DX16SA	DX16SA
Daikin	DX16TC	DX16TC
Daikin	DX17VSS	DX17VSS
Daikin	DX18TC	DX18TC
Daikin	DX20VC	DX20VC
Goodman	GSX16	GSX16
Goodman	GSXC16	GSXC16
Goodman	GSXC18	GSXC18
Lennox	XC13	XC13
Lennox	16ACX	16ACX
Lennox	EL16XC1	EL16XC1
Lennox	XC16	XC16
Lennox	XC20	XC20
Lennox	SL18XC1	SL18XC1
Lennox	XC21	XC21
Lennox	XC25	XC25
Payne	PA16NA	PA16NA

Central AC Review

- EER Requirements
 - Verify **entire system** meets minimum 12 EER requirement via AHRI lookup

Requirements

Minimum nominal Seasonal Energy Efficiency Rating (SEER) of 15 or greater for the outdoor unit, and a minimum total system Energy Efficiency Rating (EER) of 12 or greater

Ask your contractor to verify the outdoor unit can be found on the qualifying products list and that the total system achieves a minimum 12 EER rating via the AHRI website to ensure your installation qualifies.

Central AC Review

AHRI Directory of Certified Product Performance

Enter AHRI Certified Reference Number

Search By: ☒ AHRI Reference # ☐ Model Number ☐ Product Type

[Request Assistance](#) [User Guide and FAQs](#) [Login](#) [English](#)

[Additional Resources](#)

Quick Search Criteria

AHRI Certified Reference Number

Manufacturer Type

Outdoor Unit Brand Name

Outdoor Unit Model Number (Condenser or Single Package)

Indoor Unit Brand Name

Indoor Unit Model Number (Evaporator and/or Air Handler)

Furnace Model Number

Cooling Capacity (A2) - Single or High Stage (95F),btuh

SEER

EER (A2) - Single or High Stage (95F)

IEER

Sold in?

Air Conditioners and Air Conditioner Coils

AHRI Certified Reference Number	Old AHRI Reference Number	Model Status	Manufacturer Type	AHRI Type	Phase	Series Name	Brand Name	Model Number (Condenser or Single Package)	Brand Name	Model Number (Evaporator and/or Air Handler)	Furnace Model Number	AHRI Certified Ratings	Des Test Con				
												Cooling Capacity (A2) - Single or High Stage (95F),btuh	EER (A2) - Single or High Stage (95F)	SEER	Indoor Full Load Air Volume Rate (A2 SCFM)	Indoor Cooling Intermediate Air Volume Rate (Ev SCFM)	Indoor Cooling Minimum Air Volume Rate (B1 SCFM)
10327795		Active	Systems	RCU-A-C	1	INFINITY 21 AC 2-STAGE	CARRIER	24ANB148A*031**	CNPV*6124AL*~TDR			47000	12.50	15.00	1400		1120
202028267		Production Stopped	Systems	RCU-A-C	1	16 SEER AC - HIGH EER	CARRIER	CA16NW061*0~B*	CAP**6021AL*~TDR			57000	12.50	15.00	1750		
205463330		Active	Systemd	RCU-A-C	1	13 SEER AC	CARRIER	CA13NA036N*D	FEU004B**~NAUA44801CK			34800	12.50	15.00	1255		
10327694		Active	Systems	RCU-A-C	1	INFINITY 21 AC 2-STAGE	CARRIER	24ANB148A*031**	CNPV*4824AL*~TDR			48000	12.50	15.00	1400		1120
10361013		Active	Systems	RCU-A-C	1	INFINITY 21 AC 2-STAGE	CARRIER	24ANB136A*031**	CSPH*3612AL*~TDR			36900	12.50	15.00	1050		840
202132907		Active	Systems	RCU-A-C	1	15 SEER AC - HIGH EER	CARRIER	24AA548A*030*	CNPV*6124AL*~TDR			46000	12.50	15.00	1600		
201635315		Active	Systems	RCU-A-C	1	PERFORMANCE 16 AC	CARRIER	24AP8660A*030*	CAP**6121AL*~TDR			56500	12.50	15.00	1450		
9180423		Production Stopped	Systems	RCU-A-C	1	PERFORMANCE 16 AC	CARRIER	24ACC860A*030*	CNPV*6124AL*~TDR			54000	12.50	15.00	2000		
202028056		Production Stopped	Systems	RCU-A-C	1	16 SEER AC - HIGH EER	CARRIER	CA16NW054*0~B*	CSPH*6012AL*~TDR			54000	12.50	15.00	1625		
103606027		Active	Systems	RCU-A-C	1	INFINITY 21 AC 2-STAGE	CARRIER	24ANB136A*031**	CNPV*3617AL*~TDR			36000	12.50	15.00	1200		925

Terms | The AHRI Certification Program | Search Standards | Homeowners | Contractors and Specifiers | 2.11.00
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- AHRI Directory – online resource tool to lookup ratings for many HVAC system combinations, including Central AC.

Central AC Review

- In order for a Central AC system to receive an incentive, the **entire system listed on AHRI** must be installed.
- Essentially, if it's listed, it needs to be installed

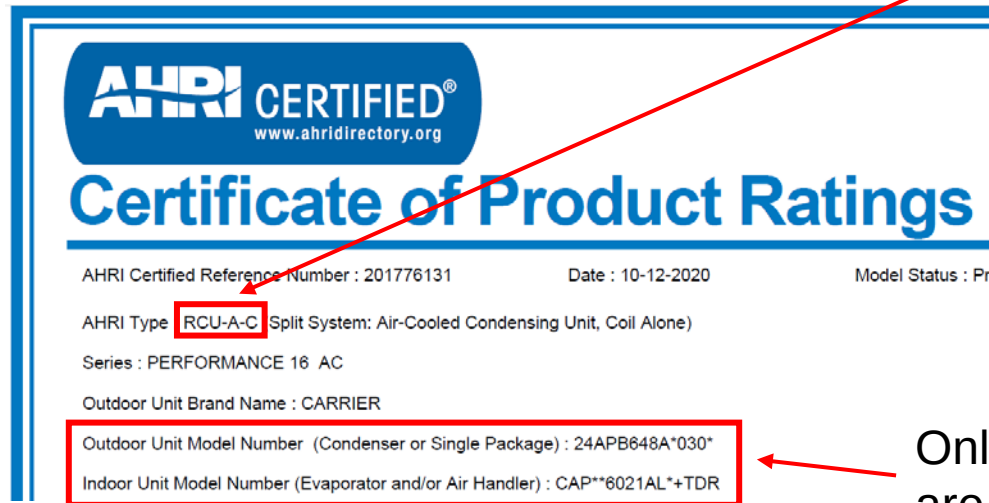


Certificate of Product Ratings

AHRI Certified Reference Number : 9311647	Date : 10-12-2020	Model Status : Production Stopped
AHRI Type : RCU-A-CB (Split System: Air-Cooled Condensing Unit, Coil with Blower)		
Series : 15 SEER AC - HIGH EER		
Outdoor Unit Brand Name : CARRIER		
Outdoor Unit Model Number (Condenser or Single Package) : 24AAA536A*030*		
Indoor Unit Model Number (Evaporator and/or Air Handler) : CNPH*4221AL*		
Furnace Model Number : 59*N*A060V17**14		

Central AC Review

- Some AHRI combinations do not require a specific indoor blower/air handler. In these instances, a coil and outdoor unit can be paired easily with an existing furnace/blower.
- These systems are identified as “RCU-A-C”



The image shows a sample AHRI Certificate of Product Ratings form. The form is titled "AHRI CERTIFIED" with the website "www.ahridirectory.org" below it. The main title is "Certificate of Product Ratings". The form contains the following information:

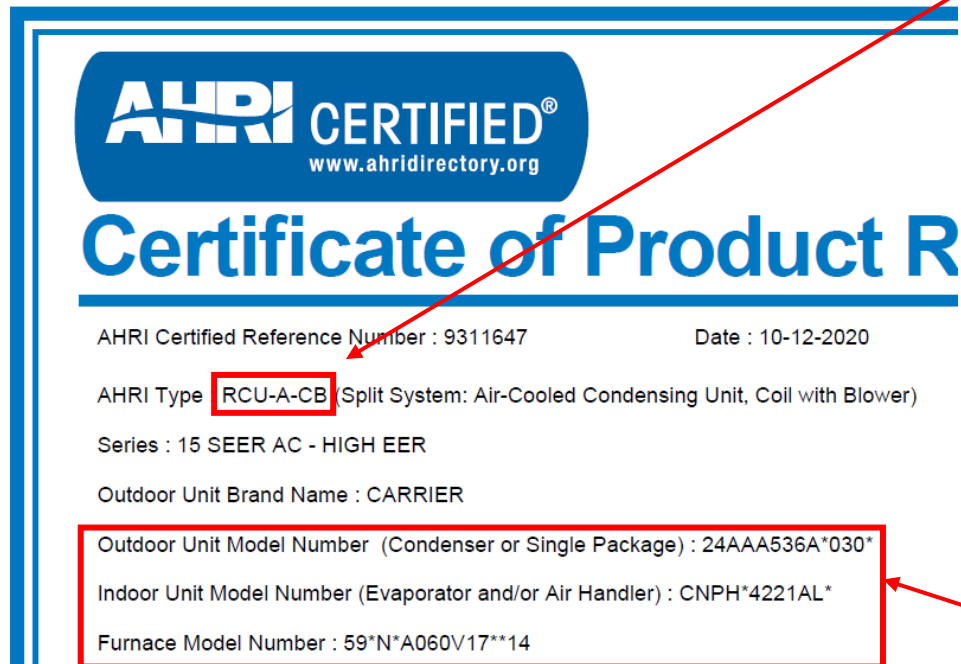
AHRI Certified Reference Number : 201776131	Date : 10-12-2020	Model Status : Pr
AHRI Type RCU-A-C Split System: Air-Cooled Condensing Unit, Coil Alone)		
Series : PERFORMANCE 16 AC		
Outdoor Unit Brand Name : CARRIER		
Outdoor Unit Model Number (Condenser or Single Package) : 24APB648A*030*		
Indoor Unit Model Number (Evaporator and/or Air Handler) : CAP**6021AL*+TDR		

Red boxes highlight the "RCU-A-C" AHRI Type and the Outdoor/Indoor Unit Model Numbers. Red arrows point from the text "Only the outdoor unit and indoor coil are specified" to these highlighted areas.

Only the outdoor unit and indoor coil are specified

Central AC Review

- Some rated systems do require a specific air handler/blower (typically matching the brand of the outdoor unit and coil)
 - These systems are identified as “RCU-A-CB”



The image shows an AHRI Certified Certificate of Product R. The certificate is framed in blue and contains the following information:

- AHRI CERTIFIED®** with the website www.ahridirectory.org
- Certificate of Product R**
- AHRI Certified Reference Number : 9311647
- Date : 10-12-2020
- AHRI Type : **RCU-A-CB** (Split System: Air-Cooled Condensing Unit, Coil with Blower)
- Series : 15 SEER AC - HIGH EER
- Outdoor Unit Brand Name : CARRIER
- Outdoor Unit Model Number (Condenser or Single Package) : 24AAA536A*030*
- Indoor Unit Model Number (Evaporator and/or Air Handler) : CNPH*4221AL*
- Furnace Model Number : 59*N*A060V17**14

Red boxes highlight the AHRI Type "RCU-A-CB" and the Outdoor Unit Model Number, Indoor Unit Model Number, and Furnace Model Number. Red arrows point from the text in the list above to these highlighted areas.

The outdoor unit, indoor coil AND furnace/air handler are specified

Central AC Review

- Ensuring Central AC application is completed correctly:

Cooling Incentive <i>One incentive per residence. Residence must be serviced Portland General Electric (PGE) or Pacific Power</i>		
Upgrade type	Requirements	Incentive amount
☐ Qualifying Central Air Conditioner	System must be a qualifying central air conditioner serving most or all of the home. Residences primarily heated with a heat pump do not qualify.	\$250
Central Air Conditioner Installed Cost: \$	New heating system installed cost (if applicable): \$	System Capacity (Tons):
Outdoor Manufacturer:	Outdoor Model:	
Indoor Evaporator Coil Manufacturer:	Indoor Evaporator Coil Model:	
Furnace/Blower Manufacturer:	Furnace/Blower Model #:	
If an eligible gas furnace was installed in an Oregon rental property with this air conditioner, please provide a customer signed Form 320C-HVAC incentive application along with this application. For more information about Energy Trust's gas furnace incentives, contact us at 1.866.311.1822 or residential@energytrust.org .		
Outdoor Unit SEER	To qualify for this incentive, the air conditioner outdoor unit is required to achieve a minimum nominal rating 15 SEER as stated by manufacturer. For list of known qualifying units, please visit: energytrust.org/central-air-conditioners/	
	Outdoor unit SEER per manufacturer (minimum 15):	Did this central air conditioner replace an existing central air conditioner? ☐ Yes ☐ No
Outdoor Unit and Coil EER	To qualify for this incentive, the system's outdoor unit and indoor coil are required to achieve a minimum rating of 12 EER per AHRI rating.	
	Outdoor unit and indoor coil EER (per AHRI):	
I have attached an AHRI certificate*: ☐ Yes ☐ No - list certificate number:		

Confirm each model listed on the AHRI certificate is included on this application

Either attach a copy of the AHRI certificate, or provide the corresponding AHRI cert. #

Central AC Review

- Still have questions?
 - Reach out to your local account manager and schedule a Central AC/AHRI training to discuss each of these steps in-depth

Indoor Air Quality

- What does Indoor Air quality mean to attendees?
- How are they seeing this manifest in their work?



Thank you

Marshall Johnson

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