

2023 Solar Updates for Trade Allies

Lori Lull, Project Manager – Renewable Energy

Agenda

9:30-10:30 Breakout - Energy Trust

- General Info: (Kyle)
- Battery Incentive Launch (Kyle)
- Business Development Fund Changes (Lori)
- Future Energy Trust focus (Lori)

10:45-11:45 Breakout

- OSSIA- Market updates, Legislative updates
- ODOE- Solar program

Who wants to meet the team?

Trade Ally Support



Kyle Holmes
Associate Account Manager
*Trade ally communications
and account management*



Lori Lull
Project Manager
*Solar trade ally
network management*

Delivery Team

Customer Support, Solar Leads, Incentive Applications and Payments

- **Frannie McNally** (*Lead Incentive Customer Service Representative*)
- **Kathi Appleberry** (*Senior Incentive Customer Service Representative*)
- **John Corey** (*Senior Incentive Customer Service Representative*)
- **Clark Yokom** (*Senior Incentive Customer Service Representative*)
- **Makahi Hurst-Sloane** (*Senior Incentive Customer Service Representative*)



Energy Assurance Company

- Project Design Review and Verification
- Trade Ally Support Services



Tradeallysupport@energyassurancecompany.com



Market Ready Solutions Team

- **Dave McClelland** (*Sr. Program Manager*)
Program Strategy and Team Management
- **Matt Getchell** (*Program Manager*)
Incentives Portfolio and Product Development
- **Joshua Reed** (*Project Manager*)
Forms/Contracts, NonRes Solar Support, and Custom Renewables
- **Alina Lambert** (*Project Manager*)
PowerClerk Design, Operations, and Community Solar

Operations Support Team – Incentive Approvals, Data, and Reporting

- **Renita Lamberth** (Operations Coordinator)
- **Elisa Simko** (*Operations Analyst*)

Recent Transitions

- **Robert Wyllie** (*Project Manager – Innovation and Development Services*)
New Funding Opportunities and External Partnerships
- **Jeni Hall** (*Program Manager – Communities and New Initiatives*)
Utility Partnerships, Resilience, Workforce Development & Cross-Program Initiatives



SOLAR

September 18, 2023

Energy Trust draft 2024 Budget and 2024-2025 Action Plan available for public comment in October

Developed in collaboration with utility partners and with input from stakeholders and our advisory councils, Energy Trust's...

Network News

May 12, 2023

Avista Interruptible customers now eligible

Energy Trust is now able to serve a new group of Avista customers in Oregon. Avista...

Network News

May 8, 2023

Changemaker: Heather

July 17, 2023

Save the date for Trade Ally Forums in October

Energy Trust is excited to host our Fall Trade Ally Forums in-person again this year. Trade...

Commercial SW Washington, EPS New Construction, Existing Buildings, Existing Multifamily, Home Retrofit, Industry + Ag, Lighting, Network News, New Buildings, Residential SW Washington, Retail, Solar

July 17, 2023

Changemaker: Pooja Sonalee Apple draws inspiration for adaptive reuse and sustainability solutions from nature

Changemaker Pooja Sonalee Apple worked at progressive architecture firms for nearly a decade before founding her...



SOLAR

Overview

Incentives

Trade Ally Rating

Business Development

Program Training

Solar Ready & Solar+Storage Ready

Forms & Resources

ENROLL IN THIS PROGRAM

TRAINING + EVENTS

See All

No upcoming events

POPULAR UPDATES

Save the date for Trade Ally Forums in October (Commercial SW Washington, EPS New Construction, Existing Buildings, Existing Multifamily, Home Retrofit, Industry + Ag, Lighting, Network News, New Buildings, Residential SW

Insider Website and Newsletter

Please check that we have all the company emails for communication.

We're going to start using this again starting this month.

Give us feedback on topics of interest!

insider.energytrust.org/solar

Battery Storage Incentive Launch

Why are we doing this?

HB3141 (2021)

- Public Purpose Charge funds extended to Dec 31, 2035.
- Customer investments in “distribution system-connected technologies that support reliability, resilience and integration of renewable energy resources” with the grid
- 25% of funds must be used for low to moderate income customers.



Battery Storage- Why is this important?

- Utilities need to connect with grid assets and are running pilot programs for virtual power plants
- Community owned distributed renewables
- We need expert contractors that know how to design and install smart battery storage

WE NEED YOU!



Battery Storage Incentive Information

- New incentive launched July 2023
- \$250/kwh up to \$3,000
- \$750/kwh up to \$10,000 for income qualified homes
- Check the status report:

Battery Storage for Homes

Date	Step	Incentive	Allocation	Applications	Received Reservations	Remaining Applications	Remaining Incentives
7/20/2023	Step 1	\$250/kWh up to \$3,000	\$ 300,000	26	\$ 76,780	74	\$ 223,220
	Step 2	\$250/kWh up to \$3,000	\$ 200,000	-	\$ -	67	\$ 200,000
	Step 3	TBD	TBD				
			\$ 500,000	26	\$ 76,780		\$ 423,220

Battery Storage (Income-Qualified)

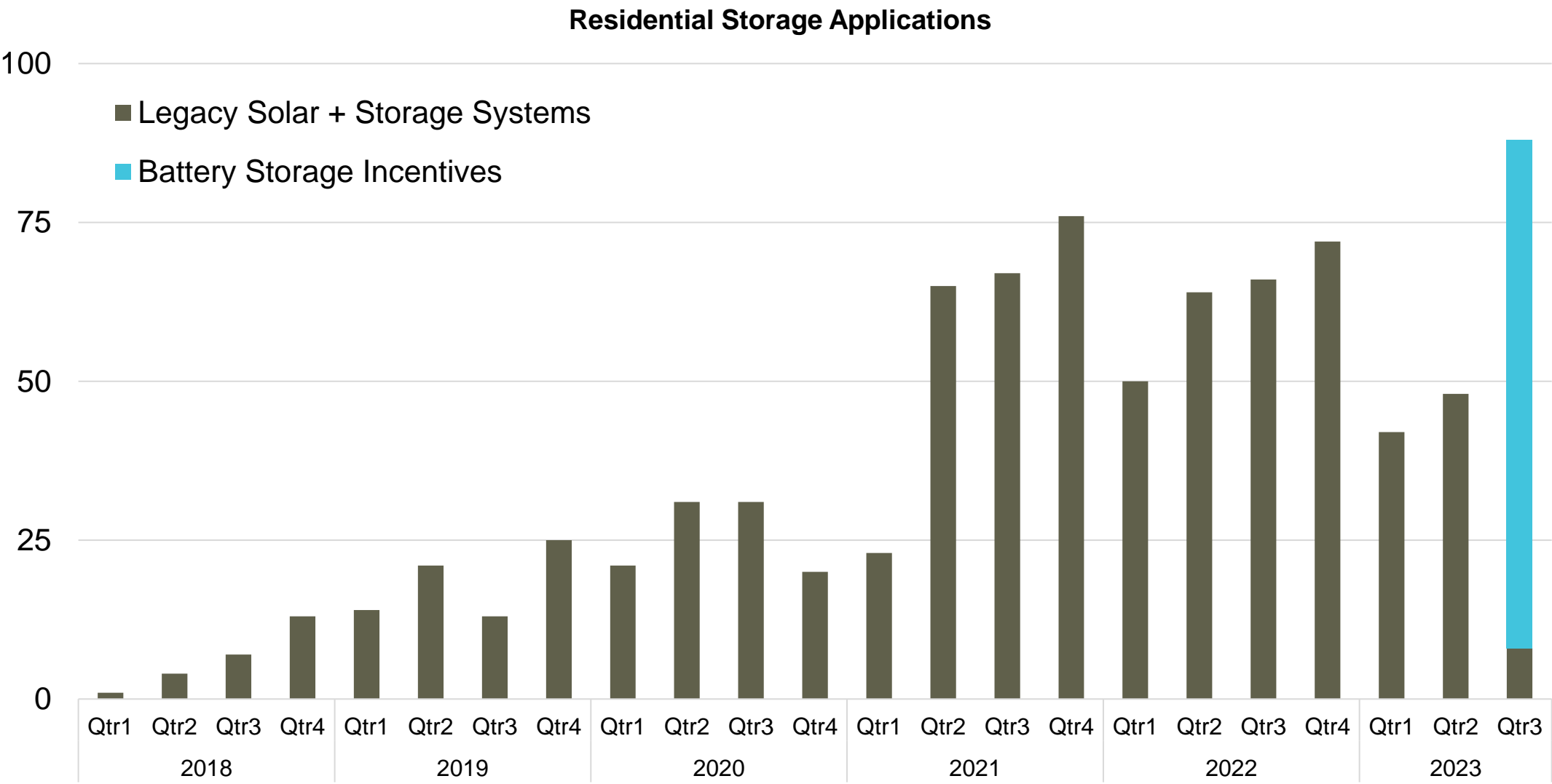
Date	Step	Incentive	Allocation	Applications	Received Reservations	Remaining Applications	Remaining Incentives
7/20/2023	Step 1	\$750/kWh to \$10,000	\$ 300,000	5	\$ 47,275	25	\$ 252,725
	Step 2	\$750/kWh to \$10,000	\$ 200,000	-	\$ -	13	\$ 200,000
	Step 3	TBD	TBD				
			\$ 500,000	-	\$ 47,275		\$ 452,725

Equipment Requirements

To be eligible for incentives, the battery energy storage system must meet the criteria listed below:

- 1.1 Must be **UL 9540** certified.
- 1.2 Must have a nameplate capacity of 3kWh or greater.
- 1.3 Must be paired with a new or existing program-qualifying solar installation.
- 1.4 Must be capable of providing resilience to the home.
- 1.5 Must have a 10-year Manufacturer Warranty that allows the battery to be used for grid flexibility and/or time of use arbitrage. The exact form of the warranty may vary but will generally include language that allows a specified number of cycles or throughput.
- 1.6 Must be a stationary battery storage system permanently secured to the home. Systems receiving Energy Trust or Oregon incentives are associated with a particular site and shall not be used for mobile applications.

Energy Trust Battery Storage Incentives



Program Guide Updates July 2023

- Structure simplified to five Sections:

Part 1: General Overview

Part 2: Solar Trade Ally Performance and Expectations

Part 3: Residential-scale Incentive Offers

Part 4: Business-scale Incentive Offers

Part 5: Solar Incentive Application Process

- Guidance regarding solar resource tools- future updates will be noted on the Energy Trust website
- Information on the Battery Storage Incentive!

Installation Requirements Updated July 2023

- Updated code references
- Separated sections to differentiate battery types
- Flashing systems listed and labeled to UL2703A as an additional option for array mounting
- Electronic customer manuals under certain conditions

Business Development Fund Changes

BUSINESS DEVELOPMENT

For Solar Program

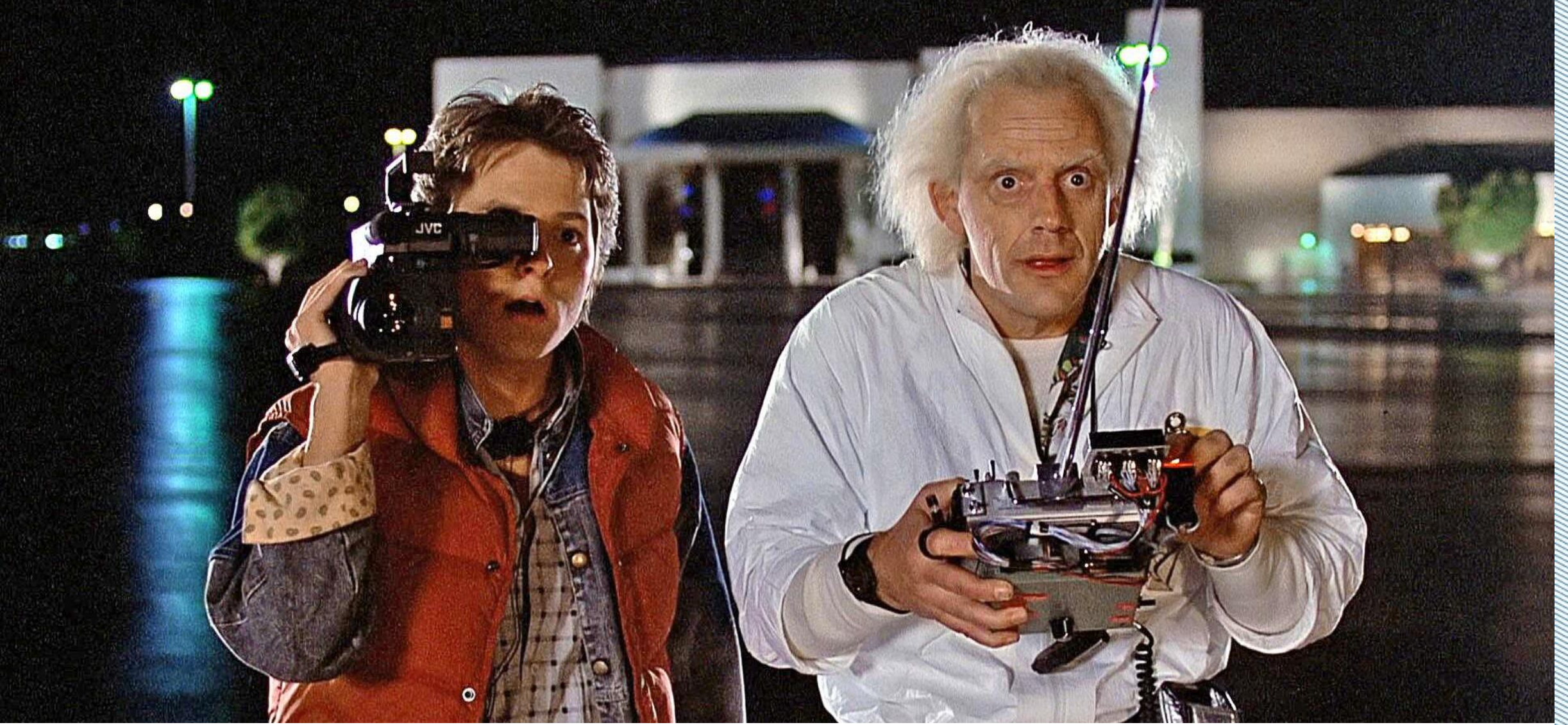
As an active Solar trade ally contractor, you are eligible to receive reimbursement for marketing projects, equipment and training as approved by Energy Trust.

What can you use it for?

- Marketing Projects
- Training and Conference attendance
- Certifications
- Equipment

Business Development Funds Changed Oct 16, 2023!

Standard Trade Ally	Minority, Women, Veteran, and Rural Trade Allies
Annual Maximum 3,000	Annual Maximum 4,000
100% reimbursement	100% reimbursement
Submit for preapproval	Submit for preapproval



What's the future of Energy Trust Solar Programming?

Stakeholder Feedback we are considering.....

Low or no cost solar
should be provided to
low Income households

Would like to see
increased diversity in
the TA network

Would like to see increased
solar adoption in rural
communities

Need more community
participation in small-scale
renewable projects

Energy Trust should work on
community energy resilience that
leverages federal funds

Strengthen the collaboration
between utilities and energy trust
to drive battery storage adoption

Trade Ally Feedback so far.....

As certain incentives get larger,
process to receive payment
post-verification is challenging

Energy Trust needs to
update shade analysis tools

Value of residential
incentive is in the
credibility from working
with Energy Trust

Solar leads provided
by Energy Trust are
valuable

The Energy Trust
requirements cost contractors
more than the value of the
\$400 standard incentive

Technical training on
batteries would be useful

Interest rates are making
solar sales more difficult

Battery quotes are
posing new challenges
for Trade Allies

High dealer fees from
financing are concerning

Supply chain is still
causing challenges,
especially for small outfits



Incentive Portfolio is Changing...

Residential Incentives

- Income-Qualified
- Battery Storage
- Targeted Community Campaigns

Business Incentives

- Standard incentives continue
- Equity-focused
- Development Assistance
- Battery Storage?
- Resilience?

Community Solar!

- Development and Installation
- Refer your customers that can't install!

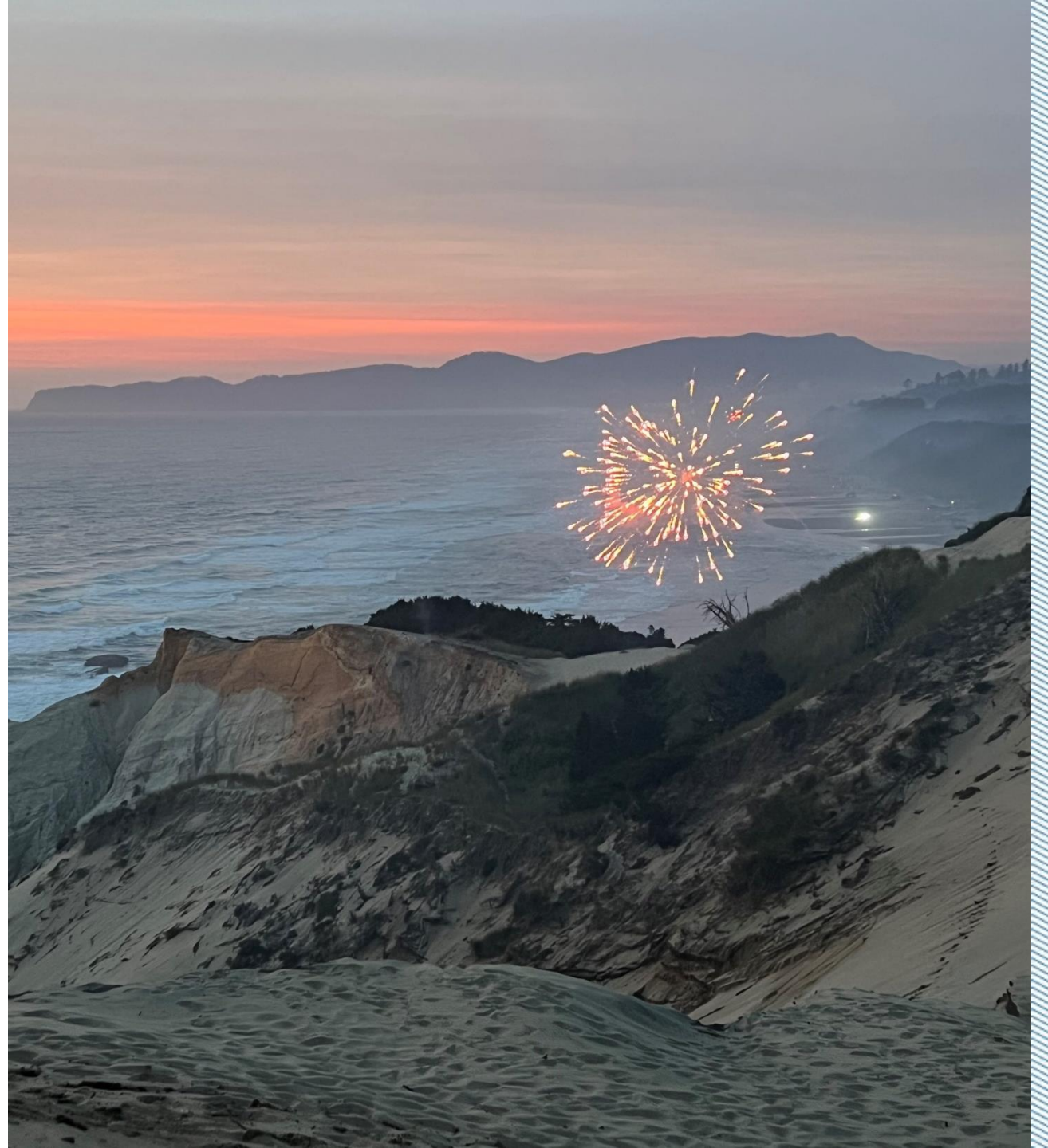
Sunset of Standard Residential Incentive

\$400 isn't influential

Within our existing budget
what can we do?

- Leads process
- Customer Education
- Financing

We want feedback



Financing?!

- We know Interest Rates are HIGH
- Options for financing in Oregon are limited
- We want Oregon to be ready for Greenhouse Gas Reduction Fund \$



Inflation Reduction Act

\$27 billion



EPA Greenhouse Reduction Fund

\$7 billion



Solar for All
Clean Energy For
States

\$14 billion



**National Clean
Investment Fund**
Green Banks
Deploying Clean
Energy Investments

\$6 billion



**Clean Communities
Investment
Accelerator**
Developing hubs to
built capacity for
disadvantaged
communities

Solar For All

Energy Trust, Oregon Department of Energy, Bonneville Environmental Foundation applied for \$139 million over 5 years

If awarded:

- **Increase incentives for single family, multifamily and community solar that benefits low-income participants**
- **Develop long term strategies to support low-income participation in solar programs**
- **Work with community partners to reach disadvantaged communities**
- **Support workforce development in disadvantaged communities.**

Award announcement in March 2024



Thank you

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Questions?

Feedback?





Feedback Session:

What support with time or \$ would help your business the most?

OSSIA & ODOE

Battery Storage- Why is this important?

- Solar + Storage can provide customers with resilience during power outages and increased bill savings by optimizing time of use
- To meet Oregon's 100% Clean Energy goals, utilities will need to build 'virtual power plants' made up of smart devices in homes and businesses across the state working together to provide grid services like a traditional power plant
- Both Smart Inverters & Smart Battery Storage are critical components.
- This grid of the future needs expert solar trade ally contractors



WE NEED YOU!

Business Development Funds

BUSINESS DEVELOPMENT FUND GUIDELINES

SOLAR TRADE ALLY NETWORK

As a trade ally, you may be eligible to receive partial reimbursement for marketing projects and training approved by Energy Trust of Oregon. Using the Energy Trust logo in your marketing pieces positions your business as a solar expert, and participating in training helps your business improve and grow.

Examples of eligible cooperative marketing projects

Print advertisements—Yellow Pages, direct mail and brochures

Digital media—online banner ads, pay-per-click ads

Radio and television advertisements

Outdoor yard signs and billboards

Apparel

Energy Trust trade ally logo may be embroidered or screenprinted on shirts, jackets or hats. Logo must be black or white and oriented horizontally on the left sleeve or chest.

Events

Trade allies can receive reimbursements for pre-approved event display costs.

Website

Website must follow print marketing guidelines and logo must hyperlink to www.energytrust.org/solar.

Training and continuing education

The following pre-approved trainings are eligible for business development funds:

- Trainings and workshops listed on the Training & Education Calendar at www.energytrust.org/ta/solar
- Classes offering continuing education units for Construction Contractors Board (CCB), Building Codes Division (BCC), and North American Board of Certified Energy Practitioners (NABCEP)
- Industry certifications (NABCEP Entry Level Exam, NABCEP PV Installation Professional, NABCEP PV Technical Sales Professional, NABCEP Company Accreditation)
- Conference registrations

To request reimbursement for other ir
pre-approval request form available a

Eligible expenses include:

- Cooperative marketing
- Cobranded Apparel
- Community Events
- Technical Training
- Conference registration
- Industry certification
- ...

Get pre-approved!!

www.energytrust.org/businessdevelopment

REIMBURSEMENT

To request reimbursement for sales, marketing, advertising, or other business development trainings, submit the pre-approval request form available from www.energytrust.org/ta/solar.