Residential Program Results and Trends

Marshall Johnson
2016 Program Results

- Over 18,000 energy upgrades in existing single family homes
- 4,224 EPS new homes
- Energy savings
  - More than 42.5 million kWh saved
  - More than 2.3 million therms saved

Results are for New Homes and Existing Homes in Oregon & SW Washington
Electric Savings—2016

Results are for New Homes and Existing Homes in Oregon & SW Washington

- New Homes: 15%
- Aerator: 19%
- Lighting: 13%
- Showerheads: 19%
- LivingWise Kits: 4%
- Controls: 0%
- HVAC: 21%
- Insulation: 3%
- Other: 1%
- Water Heating: 3%
- Windows: 2%
Gas Savings—2016

Results are for New Homes and Existing Homes in Oregon & SW Washington
Existing Homes Project Installations

**Gas**
- 65%: Trade Ally
- 22%: Self-Install
- 13%: non-Trade Ally

**Electric**
- 84%: Trade Ally
- 8%: Self-Install
- 8%: non-Trade Ally
2016 Trends
EPS New Homes Trends

- **Elec. heat / Elec. DHW**
- **Elec. heat / Gas DHW**
- **Gas heat / Elec. DHW**
- **Gas heat / Gas DHW**

<table>
<thead>
<tr>
<th>Year</th>
<th>Elec. heat / Elec. DHW</th>
<th>Elec. heat / Gas DHW</th>
<th>Gas heat / Elec. DHW</th>
<th>Gas heat / Gas DHW</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>422 (99)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2015</td>
<td>691 (224)</td>
<td>81 (80)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2016</td>
<td>1033 (305)</td>
<td>315 (315)</td>
<td></td>
<td>1676 (305)</td>
</tr>
</tbody>
</table>

Homes sold by type of heating and hot water system over the years 2014 to 2016.
Existing Homes Trends—Electric

- **Weatherization**
- **Lighting & Showerheads**
- **Equipment**

**2016 goal**

<table>
<thead>
<tr>
<th>Year</th>
<th>kWh</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>25,000,000</td>
</tr>
<tr>
<td>2014</td>
<td>35,000,000</td>
</tr>
<tr>
<td>2015</td>
<td>40,000,000</td>
</tr>
<tr>
<td>2016</td>
<td>45,000,000</td>
</tr>
</tbody>
</table>
Existing Homes Trends—Gas

- Weatherization
- Lighting & Showerheads
- Equipment

2016 goal

therms

- 2013
- 2014
- 2015
- 2016
Gas Hearth Trends

- **2016**: FE < .70: 0, FE .70+: 1,300, FE .75+: 250
- **2015**: FE < .70: 100, FE .70+: 1,400, FE .75+: 150
- **2014**: FE < .70: 150, FE .70+: 1,400, FE .75+: 50
- **2013**: FE < .70: 200, FE .70+: 1,350, FE .75+: 50

**Project count**

0 500 1,000 1,500 2,000
Gas Furnace Trends

Furnace

- 2016
- 2015
- 2014
- 2013

Project count

0 200 400 600 800 1,000 1,200

Legend:
- SWR
- WA
- Rentals
Thermostat Trends

**Thermostat - elec.**

<table>
<thead>
<tr>
<th>Year</th>
<th>Project count</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>600</td>
</tr>
<tr>
<td>2015</td>
<td>200</td>
</tr>
<tr>
<td>2014</td>
<td>100</td>
</tr>
<tr>
<td>2013</td>
<td>50</td>
</tr>
</tbody>
</table>

**Thermostat - gas**

<table>
<thead>
<tr>
<th>Year</th>
<th>Project count</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>3300</td>
</tr>
<tr>
<td>2015</td>
<td>600</td>
</tr>
<tr>
<td>2014</td>
<td>200</td>
</tr>
<tr>
<td>2013</td>
<td>50</td>
</tr>
</tbody>
</table>
Insulation Trends

Ceiling insulation - electric

- 2016: Project count
- 2015: Project count
- 2014: Project count
- 2013: Project count

Ceiling insulation - gas

- 2016: Project count
- 2015: Project count
- 2014: Project count
- 2013: Project count
Windows Trends

**Windows - elec.**

- 2016: Tier 1 (600-800), Tier 2 (>800)
- 2015: Tier 1 (500-700), Tier 2 (>700)
- 2014: Tier 1 (400-600), Tier 2 (>600)
- 2013: Tier 1 (300-500), Tier 2 (>500)

**Windows - gas**

- 2016: Tier 1 (700-900), Tier 2 (>900)
- 2015: Tier 1 (600-800), Tier 2 (>800)
- 2014: Tier 1 (500-700), Tier 2 (>700)
- 2013: Tier 1 (400-600), Tier 2 (>600)
Water Heating Trends

**Elec. water heating**
- Categories: Tier 1 HPWH, Tier 2 or 3 HPWH, Tank.

**Gas water heating**
- Categories: Tank < 0.70, Tank > 0.70.
Ductless Heat Pump Trends

Ductless heat pump

<table>
<thead>
<tr>
<th>Year</th>
<th>Installed in EH</th>
<th>Installed in XMH</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>1,700</td>
<td>100</td>
</tr>
<tr>
<td>2015</td>
<td>1,650</td>
<td>150</td>
</tr>
<tr>
<td>2014</td>
<td>1,500</td>
<td>200</td>
</tr>
<tr>
<td>2013</td>
<td>1,400</td>
<td>300</td>
</tr>
</tbody>
</table>

Measure count: 0 to 2,000
2017 Areas of Focus
# 2017 Electric Savings Goals—Existing Homes

<table>
<thead>
<tr>
<th>Program Category</th>
<th>2017 Electric Savings (kWh)</th>
<th>% of Portfolio</th>
<th>% Change Allocated Savings 2017 v 2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Controls</td>
<td>471,756</td>
<td>1%</td>
<td>0%</td>
</tr>
<tr>
<td>HVAC</td>
<td>10,243,492</td>
<td>30%</td>
<td>2%</td>
</tr>
<tr>
<td>Insulation</td>
<td>681,195</td>
<td>2%</td>
<td>-1%</td>
</tr>
<tr>
<td>Other</td>
<td>1,734,171</td>
<td>5%</td>
<td>1%</td>
</tr>
<tr>
<td>Water Heating</td>
<td>5,371,270</td>
<td>16%</td>
<td>11%</td>
</tr>
<tr>
<td>Windows</td>
<td>722,337</td>
<td>2%</td>
<td>0%</td>
</tr>
<tr>
<td>XMH Free Service</td>
<td>458,266</td>
<td>1%</td>
<td>0%</td>
</tr>
<tr>
<td>Aerators</td>
<td>4,643,550</td>
<td>14%</td>
<td>-6%</td>
</tr>
<tr>
<td>Lighting</td>
<td>4,505,376</td>
<td>13%</td>
<td>-2%</td>
</tr>
<tr>
<td>Showerheads</td>
<td>5,131,906</td>
<td>15%</td>
<td>-6%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>33,963,318</strong></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## 2017 Gas Savings Goals – Existing Homes

<table>
<thead>
<tr>
<th>Program Category</th>
<th>2017 Gas Savings (therm)</th>
<th>% of Portfolio</th>
<th>% Change Allocated Savings 2017 v 2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Controls</td>
<td>178,528</td>
<td>14%</td>
<td>10%</td>
</tr>
<tr>
<td>Gas Hearth</td>
<td>208,890</td>
<td>17%</td>
<td>0%</td>
</tr>
<tr>
<td>HVAC</td>
<td>134,328</td>
<td>11%</td>
<td>3%</td>
</tr>
<tr>
<td>Insulation</td>
<td>56,284</td>
<td>5%</td>
<td>1%</td>
</tr>
<tr>
<td>Other</td>
<td>96,679</td>
<td>8%</td>
<td>5%</td>
</tr>
<tr>
<td>Water Heating</td>
<td>54,659</td>
<td>4%</td>
<td>3%</td>
</tr>
<tr>
<td>Windows</td>
<td>144,787</td>
<td>12%</td>
<td>1%</td>
</tr>
<tr>
<td>XMH Free Service</td>
<td>571</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Aerators</td>
<td>145,869</td>
<td>12%</td>
<td>-11%</td>
</tr>
<tr>
<td>Showerheads</td>
<td>175,545</td>
<td>14%</td>
<td>-4%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>1,238,266</strong></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## 2017 Regional Focus – New Homes

<table>
<thead>
<tr>
<th>Region</th>
<th>2017 Targets</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 - North Coast</td>
<td>17</td>
</tr>
<tr>
<td>2 - South Coast</td>
<td>0</td>
</tr>
<tr>
<td>3 - Portland Metro</td>
<td>2,555</td>
</tr>
<tr>
<td>4 - Mid Willamette Valley</td>
<td>32</td>
</tr>
<tr>
<td>5 - Southern Willamette Valley</td>
<td>108</td>
</tr>
<tr>
<td>6 - Southern</td>
<td>133</td>
</tr>
<tr>
<td>7 - Columbia Basin</td>
<td>26</td>
</tr>
<tr>
<td>8 - Central</td>
<td>368</td>
</tr>
<tr>
<td>9 - Klamath Basin</td>
<td>0</td>
</tr>
<tr>
<td>10 - Northeast</td>
<td>5</td>
</tr>
<tr>
<td>11 - Eastern</td>
<td>0</td>
</tr>
<tr>
<td>12 - Southwest Washington</td>
<td>593</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>3,837</strong></td>
</tr>
</tbody>
</table>
Thank You

Marshall Johnson
Sr. Program Manager, Residential
Marshall.Johnson@energytrust.org
503.445.2949
2016 Multifamily Program Results

• 2,840 projects completed
• 1,807 sites served
• $4,448,902 paid in incentives
• Energy Savings
  - 20,787,800 kWh
  - 252,900 therms
2016 Prescriptive Electric Savings

- HVAC: 62%
- Weatherization: 31%
- Water Heating: 3%
- Food Service: 2%
- Appliance: 2%
2016 Prescriptive Gas Savings

- Weatherization: 7%
- Food Service: 10%
- Water Heating: 17%
- HVAC: 66%
Prescriptive Measure Trends
Electric Savings
All prescriptive savings—Electric

<table>
<thead>
<tr>
<th>Year</th>
<th>kWh</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>1200000</td>
</tr>
<tr>
<td>2014</td>
<td>2400000</td>
</tr>
<tr>
<td>2015</td>
<td>2400000</td>
</tr>
<tr>
<td>2016</td>
<td>4200000</td>
</tr>
<tr>
<td>2017</td>
<td>4800000</td>
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</table>
Weatherization—Electric

- Windows
- Insulation

<table>
<thead>
<tr>
<th>Year</th>
<th>kWh</th>
</tr>
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<tbody>
<tr>
<td>2013</td>
<td>800,000</td>
</tr>
<tr>
<td>2014</td>
<td>1,200,000</td>
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<tr>
<td>2015</td>
<td>1,000,000</td>
</tr>
<tr>
<td>2016</td>
<td>1,600,000</td>
</tr>
</tbody>
</table>
Foodservice Equipment—Electric

<table>
<thead>
<tr>
<th>Year</th>
<th>kWh</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td></td>
</tr>
<tr>
<td>2014</td>
<td></td>
</tr>
<tr>
<td>2015</td>
<td></td>
</tr>
<tr>
<td>2016</td>
<td>100,000</td>
</tr>
</tbody>
</table>
Prescriptive Measure Trends
Gas Savings
All Prescriptive Savings—Gas

2013: 10,000 therms
2014: 50,000 therms
2015: 60,000 therms
2016: 80,000 therms
2017: 60,000 therms
Boilers and Steam Traps—Gas

- **Boiler**
- **Steam trap**

<table>
<thead>
<tr>
<th>Year</th>
<th>Boiler</th>
<th>Steam Trap</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>20,000</td>
<td></td>
</tr>
<tr>
<td>2014</td>
<td>20,000</td>
<td></td>
</tr>
<tr>
<td>2015</td>
<td>20,000</td>
<td></td>
</tr>
<tr>
<td>2016</td>
<td>20,000</td>
<td></td>
</tr>
</tbody>
</table>
Furnaces—Gas

<table>
<thead>
<tr>
<th>Year</th>
<th>Therms</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td></td>
</tr>
<tr>
<td>2014</td>
<td></td>
</tr>
<tr>
<td>2015</td>
<td></td>
</tr>
<tr>
<td>2016</td>
<td></td>
</tr>
</tbody>
</table>
2017 Direction
Key Measures for 2017

• Electric
  – Ductless heat pumps and packaged terminal heat pumps—high savings, growing in popularity
  – Weatherization—high demand, consistent opportunity
  – Water heating—strong growth area

• Gas
  – Boilers—high savings, high incentive
  – Steam traps—high savings, quick payback
  – Tankless water heaters—expanding measure, growing in popularity
On the Horizon

• <199 kBTU tankless water heaters
  – Requirements: no added storage tanks
  – (>200 kBTU measure – unchanged)

• Smart thermostats
  – Qualifying models: Nest and Ecobee
  – All property types qualify
New Hires

• Brooke Ingram
  – Business Development in Southern Oregon
    • Contact: brooke.ingram@lmco.com
    • 503-354-4491

• Dan St. Germain
  – Business Development in Central and Eastern Oregon
    • Contact: daniel.j.st.germain@lmco.com
    • 541-419-7907
Thank You

Kate Scott
Multifamily Program Manager

kate.scott@energytrust.org
OREGON LOW-INCOME ENERGY SERVICES

PRESENTED BY:
MICHAEL FIGUEREDO, Training and Technical Assistance Coordinator
The Energy Services programs are designed to support housing stabilization for low-income Oregonians by providing energy bill payment assistance and weatherization services to effectively reduce energy costs and improve occupant overall health.
OREGON’S LOW INCOME WEATHERIZATION ASSISTANCE PROGRAM

The programs provide weatherization and energy conservation services at **no cost** to households at or below 200% federal poverty level.

Weatherization services include:

- Conservation services
- Household health & safety repairs
- Heating equipment repair/replacement
- Energy education
CLIENT ELIGIBILITY

- OHCS WAP

- Energy Trust of Oregon
  - Savings Within Reach

<table>
<thead>
<tr>
<th>OHCS</th>
<th>Gross annual income Maximum Income</th>
</tr>
</thead>
<tbody>
<tr>
<td>Household Size</td>
<td></td>
</tr>
<tr>
<td>1 Resident</td>
<td>$23,540</td>
</tr>
<tr>
<td>2 Residents</td>
<td>$31,860</td>
</tr>
<tr>
<td>3 Residents</td>
<td>$40,180</td>
</tr>
<tr>
<td>4 Residents</td>
<td>$48,500</td>
</tr>
<tr>
<td>5 Residents</td>
<td>$56,820</td>
</tr>
<tr>
<td>6 Residents</td>
<td>$65,140</td>
</tr>
<tr>
<td>7 Residents</td>
<td>$73,460</td>
</tr>
<tr>
<td>8 Residents</td>
<td>$81,780</td>
</tr>
<tr>
<td>9 Residents</td>
<td>$90,100</td>
</tr>
<tr>
<td>10 Residents</td>
<td>$98,420</td>
</tr>
<tr>
<td>11 Residents</td>
<td>$106,740</td>
</tr>
<tr>
<td>12 Residents</td>
<td>$115,060</td>
</tr>
<tr>
<td>Each additional</td>
<td>$8,320</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SWR</th>
<th>Gross annual income Minimum</th>
<th>Maximum</th>
</tr>
</thead>
<tbody>
<tr>
<td>Household size</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1 resident</td>
<td>$23,340</td>
<td>$52,530</td>
</tr>
<tr>
<td>2 residents</td>
<td>$31,460</td>
<td>$60,070</td>
</tr>
<tr>
<td>3 residents</td>
<td>$39,580</td>
<td>$67,486</td>
</tr>
<tr>
<td>4 residents</td>
<td>$47,700</td>
<td>$75,025</td>
</tr>
<tr>
<td>5 residents</td>
<td>$55,820</td>
<td>$81,082</td>
</tr>
<tr>
<td>6 residents</td>
<td>$63,940</td>
<td>$87,014</td>
</tr>
<tr>
<td>7 residents</td>
<td>$72,060</td>
<td>$93,071</td>
</tr>
<tr>
<td>8 residents</td>
<td>$80,180</td>
<td>$99,004</td>
</tr>
</tbody>
</table>

Energy Service programs are delivered through an established network of service providers including:

- Community Action Agencies
- County Governments
OHCS administers Energy Assistance (EA) consisting of two unique programs:

- **Low-Income Home Energy Assistance Program (LIHEAP)**
  - Federal resource – US Department of Health and Human Services (USHHS)

- **Oregon Energy Assistance Program (OEAP)**
  - State resource – Portland General Electric & Pacific Power customers

The programs provide for energy bill payment assistance to households at or below 60% state median income.
OREGON’S LOW INCOME WEATHERIZATION ASSISTANCE PROGRAM

OHCS administers Oregon’s Low-Income Weatherization Assistance Program consisting of four distinct programs:

1. DOE Weatherization Assistance Program
   • Federal resource – US DOE

2. Low Income Home Energy Assistance Program- Weatherization
   • Federal resource – US HHS

3. Bonneville Power Administration
   • Federal resource - BPA

4. Energy Conservation Helping Oregonians
   • State resource – Portland General Electric & Pacific Power customers
## Energy Services - Current Annual Funding

<table>
<thead>
<tr>
<th>Program</th>
<th>Source</th>
<th>Annual Funding</th>
<th>Program Area</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low-Income Home Energy Assistance Program (LIHEAP)</td>
<td>Federal</td>
<td>$30 million</td>
<td>Energy Assistance</td>
</tr>
<tr>
<td>Oregon Energy Assistance Program (OEAP)</td>
<td>State</td>
<td>$20 million</td>
<td>Energy Assistance</td>
</tr>
<tr>
<td>Energy Conservation Helping Oregonians (ECHO)</td>
<td>State</td>
<td>$8.6 million</td>
<td>Weatherization</td>
</tr>
<tr>
<td>Bonneville Power Administration (BPA)</td>
<td>Federal</td>
<td>$1.5 million</td>
<td>Weatherization</td>
</tr>
<tr>
<td>LIHEAP Weatherization</td>
<td>Federal</td>
<td>$4.8 million</td>
<td>Weatherization</td>
</tr>
<tr>
<td>USDOE Weatherization Assistance Program (DOE WAP)</td>
<td>Federal</td>
<td>$2.6 million</td>
<td>Weatherization</td>
</tr>
<tr>
<td>Multi-Family Weatherization Assistance</td>
<td>State</td>
<td>$1.5 million</td>
<td>Weatherization</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>$69 million</strong></td>
<td></td>
</tr>
</tbody>
</table>
Low-income weatherization programs help provide stability for Oregonians with low-incomes by making homes more energy efficient and reducing overall utility bill costs.

<table>
<thead>
<tr>
<th>Time Period</th>
<th>Units Weatherized by CAA’s</th>
</tr>
</thead>
<tbody>
<tr>
<td>January 1-December 31, 2014</td>
<td>1,847</td>
</tr>
<tr>
<td>January 1- December 31, 2015</td>
<td>1,689</td>
</tr>
<tr>
<td>January 1-December 31, 2016</td>
<td>1,870</td>
</tr>
<tr>
<td>Total (1/1/14 – 12/31/16)</td>
<td>5,406</td>
</tr>
</tbody>
</table>
WEATHERIZATION PROCESS FLOW

Assess

Energy Auditor carefully assesses each home for energy upgrade opportunities including air sealing, insulation, mechanical equipment, and windows/doors as well as identifies health/safety needs and concerns.

Analyze

The Data collected is run through Energy Modeling software to determine cost effectiveness and priority of considered measures. Agencies use this to formulate a workscope.

Execute

Workscope is awarded to the contractor to complete the work as prescribed by the agency and according to program guidelines.

Inspect

The agency’s Quality Control Inspector (QCI) evaluate the installation based on the scope of work and alignment with program specifications.

Close

Agency issues payments, reports the project and energy savings, and closes the project. Client receives a packet of information and education related to energy, health, and any equipment installed.
QUESTIONS?
The Community Action Partnership of Oregon

Keith Kueny
Energy Policy Coordinator
What is the Community Action Partnership?

- Community Action Partnership of Oregon (CAPO) is the State Association for Oregon’s Community Action network of 17 Community Action Agencies and Oregon Human Development Corporation, a statewide agency serving farmworkers. CAPO and its members are part of the national Community Action Network – a network made up of more than 1,100 local, private, non-profit, and public agencies that work to alleviate and eliminate poverty.

- Each CAA uses a community-based needs assessment to develop advocacy and service priorities to provide the most relevant, most effective services for its own community.
Services Offered by Community Action Agencies:

- Affordable Housing Development
- Child Care
- Commodity Distribution
- Community Development
- Domestic Violence Victims Assistance
- Economic Development
- Emergency Food & Shelter
- Employment Training
- Energy Assistance (LIHEAP)
- Family Shelters
- Food Banks
- Food Gleaning
- Head Start
- Homeless Shelters
- Housing Rehabilitation
- Information & Referral Service

- In-Home Care
- Warmline Life Skills Training
- Migrant/Farm worker Service
- Neighborhood Centers
- Parent Training
- Public Transportation
- Second Chance Renters Program
- Self-Help Programs
- Special Transportation
- Transitional Housing
- Transportation
- Veterans Services
- Volunteer Services
- Weatherization
- Youth Services
Weatherization Funding (Varies by Region)

• LIHEAP (Statewide)
• DOE (Statewide)
• BPA Grant & Incentive Funds (Consumer Owned Utilities)
• ECHO (PGE & Pacific Power territory)
• Cascade, NW Natural, & Avista utility-run programs
  ▫ Gas weatherization funds must be spent in homes with gas as primary heat-source
Structure of Community Action Weatherization Programs

• Grants are funneled (Leveraged) by coordinators into a single project
  • Health and Safety – ventilation, essential home repairs, & other related measures that insure a safe home
  • A single project can have several funding sources
    • There could be rehab and additional funds through additional funding sources
• RFPs offered for each home, or a group of homes, or single measures
Intake – Outreach

- Last year CAA’s issued 110,000 payments for energy assistance to Oregon households
  - Clients provide proof of income and utility billing
- Referrals are made from energy assistance to weatherization
- Or, Clients apply directly for weatherization
- Energy assistance funds can be used during a no-heat “crisis” to replace primary heat source
• Generally, the Department of Energy guidelines drive energy savings
• Rem/Rate is used for the home.
  ▫ Depending on the grant, the SIR must equal or be greater than 1.0
  ▫ Certain grants allow for measures to be grouped together -
• Oregon Housing and Community Services (OHCS), along with the agencies, work together to create work specifications that are Oregon-specific
• All jobs must be completed using OHCS’s manual
• Inspections done by local agency
Questions? Feel free to reach out to:

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350 Mission SE
Salem, OR, 97302
Home Energy Scoring Updates

Andrew Shepard
Agenda

- Energy Trust EPS Update
- City of Portland Home Energy Disclosure
  Ordinance Overview
Energy Trust’s Energy Performance Scores

• EPS for Existing Homes
  • After stakeholder input and review, EPS for Existing Homes will no longer be offered as of July
  • Earth Advantage will introduce and facilitate the Department of Energy’s Home Energy Score using CakeSystems software
  • Energy Trust will work with CakeSystems and the Oregon Department of Energy to ensure Home Energy Score sheets are HB 2801 compliant

• EPS for New Homes
  • Remains unchanged and available for newly constructed above-code homes
City of Portland Home Energy Score Ordinance

- The City of Portland recently adopted a policy to require home energy scores on single-family homes at time of sale

- Policy effective January 1, 2018
Background to Home Energy Score Ordinance

• A companion to the Portland’s Commercial Energy Use Disclosure Policy
• Primary approach to produce changes in the residential sector for the purpose of meeting the city’s Climate Action Plan
Requirements

The City of Portland's policy requires sellers of single-family homes to:

1. Obtain a home energy performance report that includes a home energy score
2. Disclose the information from the report to the City of Portland at or before the time that the home is listed publicly for sale on the market
Home Energy Score

- Online tool; can be linked to other software tools
- Takes an hour or less to complete
- Can be generated by utilities, contractors, home inspectors or others
- Automated and no reporting requirements
- Over 60,000 scores

The Home Energy Score is a national rating system developed by the U.S. Department of Energy. The Score reflects the energy efficiency of a home based on the home's structure and heating, cooling, and hot water systems. The Home Facts provide details about the current structure and systems. Recommendations show how to improve the energy efficiency of the home to achieve a higher score and save money.
Construction and Use Type

• **Single-family homes** include
  • Existing, detached single-family homes
  • Existing attached single-family structures like townhomes
  • Newly constructed homes that are either detached or attached side-by-side

• The policy will apply to attached single family homes that are laid out side-by-side and **not stacked**

• Energy modeling software can provide individual scores for attached homes only when they are **side-by-side** and not stacked
Rentals and ADUs

• Initially, the requirement will apply only to owner-occupied units
• Requirements for single-family rental homes will be phased in over time
• Detached accessory dwelling units (ADUs) are not covered by the proposed requirement
Waiver for Energy Trust EPS-Rated New Homes

• Newly-built homes receiving an Energy Trust EPS are given a waiver from complying to exact rules of the ordinance
  • EPS to be temporarily considered a compliant score
  • Waiver process is in development
  • Energy Trust will help develop process with city to ensure minimal impact on EPS verifiers and builders
City of Portland Implementation Partners

Earth Advantage has been selected to support the City of Portland in implementing the Home Energy Score Ordinance, and will:

• Support prospective assessors with onboarding, training and mentoring (Home Performance Guild will assist)
• Oversee all required quality assurance activities for assessors issuing scores
• Provide information and training options to the real estate industry
• Collaborate with Home Performance Guild and Enhabit on the city's implementation plan
Portland Home Energy Scoring

For more information, visit the City of Portland’s Home Energy Score Policy web page, or read the adopted code language:

- [https://www.portlandoregon.gov/bps/71421](https://www.portlandoregon.gov/bps/71421)
Next Steps

- Stakeholder group formed to prepare market
- HB 2801 approval process
- Onboarding of more Home Energy Assessors to accommodate demand (business opportunity for new homes verifiers)
- Study to determine HES/EPS compatibility
- Automatic RMLS data transfer
- Explore seamless process to create Home Energy Scores with REM/Rate inputs
5 year term on loans up to $2000

10 year term on loans $2,001-$5,000

Questions?
Thank You

Andrew Shepard, Sr. Project Manager NW Natural Washington

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Thank You

Please join us for the first breakout sessions at 10:30 a.m.