



Spring Trade Ally Forums
April 2018

Breakout Topics & Locations

Breakout Session A: 10:00 – 10:50

Mt. Hood A	Mt. Hood B	Garden C
Heat Pump Water Heaters: Product & Sales Training with AO Smith & Supply Chain Offerings	Portland Home Energy Scoring Update	Energy Trust Solar Program Updates
Paul Stolten and Shawn O'Neil	Wendy Koelfgen, City of Portland	Jeni Hall, Sr. Project Manager, Solar

Breakout Topics & Locations

Breakout Session B: 11:10 – 12:00

Mt. Hood A	Mt. Hood B	Mt. Hood C	Garden C
Ductless Heat Pump Sizing and Heat Pumps in Manufactured Homes	Community Energy Project & Craft3 On Bill Repayment: How to Talk About Income	State Economic Update: Employment and Housing Trends	Oregon Solar Energy Industries Association (OSEIA) Updates
Samantha Taylor (CLEAResult, Sr. Building Science Analyst)	Sherrie Pelsma Program Director, Community Energy Project & Tawny Reader, Craft3, Senior Consumer Lender, NMLS	Amy Vandervliet, Regional Economist and Pat O'Connor, Regional Economist	Jeni Hall, Sr. Project Manager, Solar

Who is here this morning?



OREGON
Air Conditioning
Contractors Association



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*



**56,000 sites
served**

 **4.42 aMW
renewable energy
generated**

2017 Accomplishments:

Multnomah, Clackamas, Washington Counties



**More than \$62 million
incentives paid**



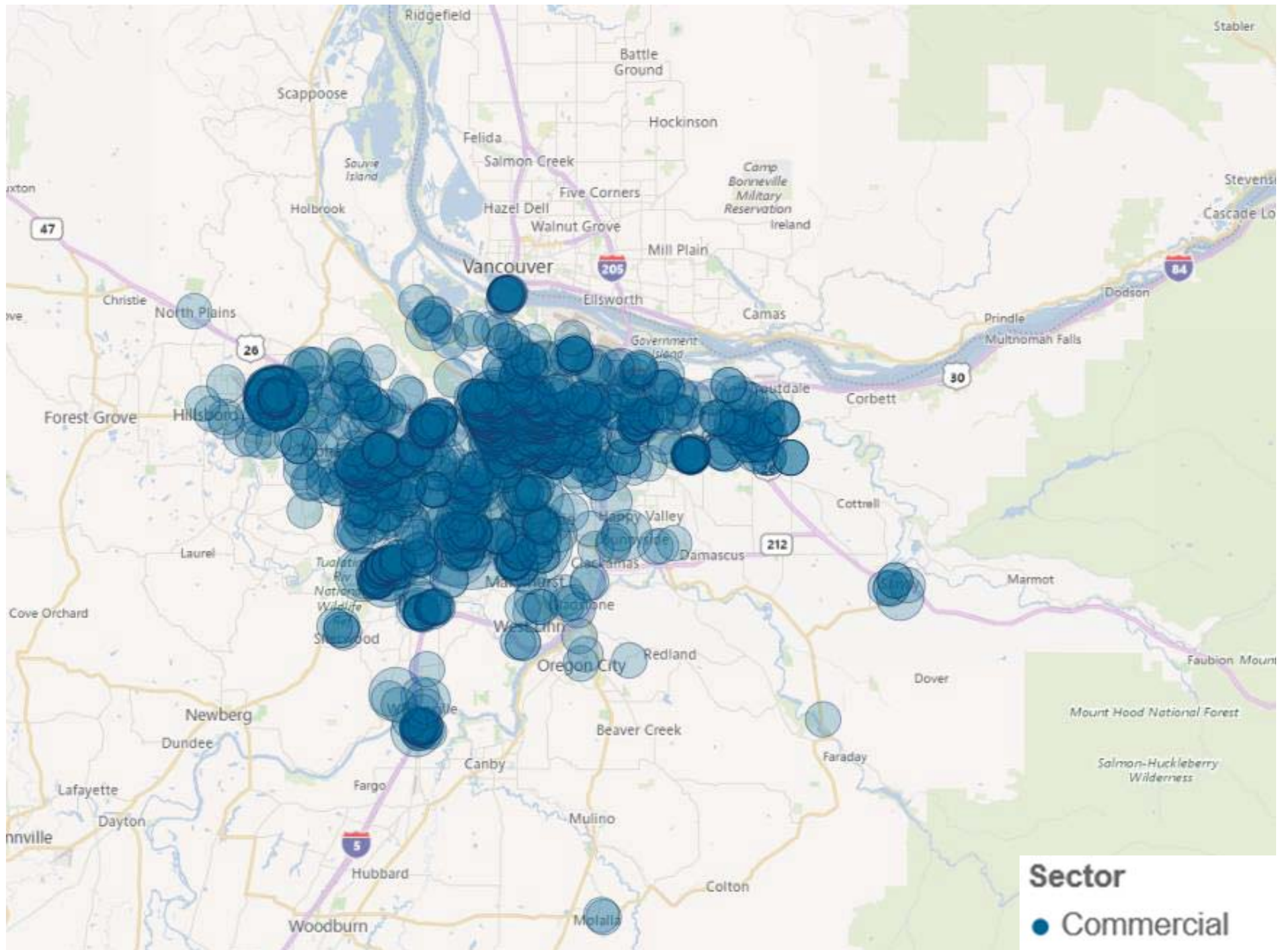
32,000 total sites served

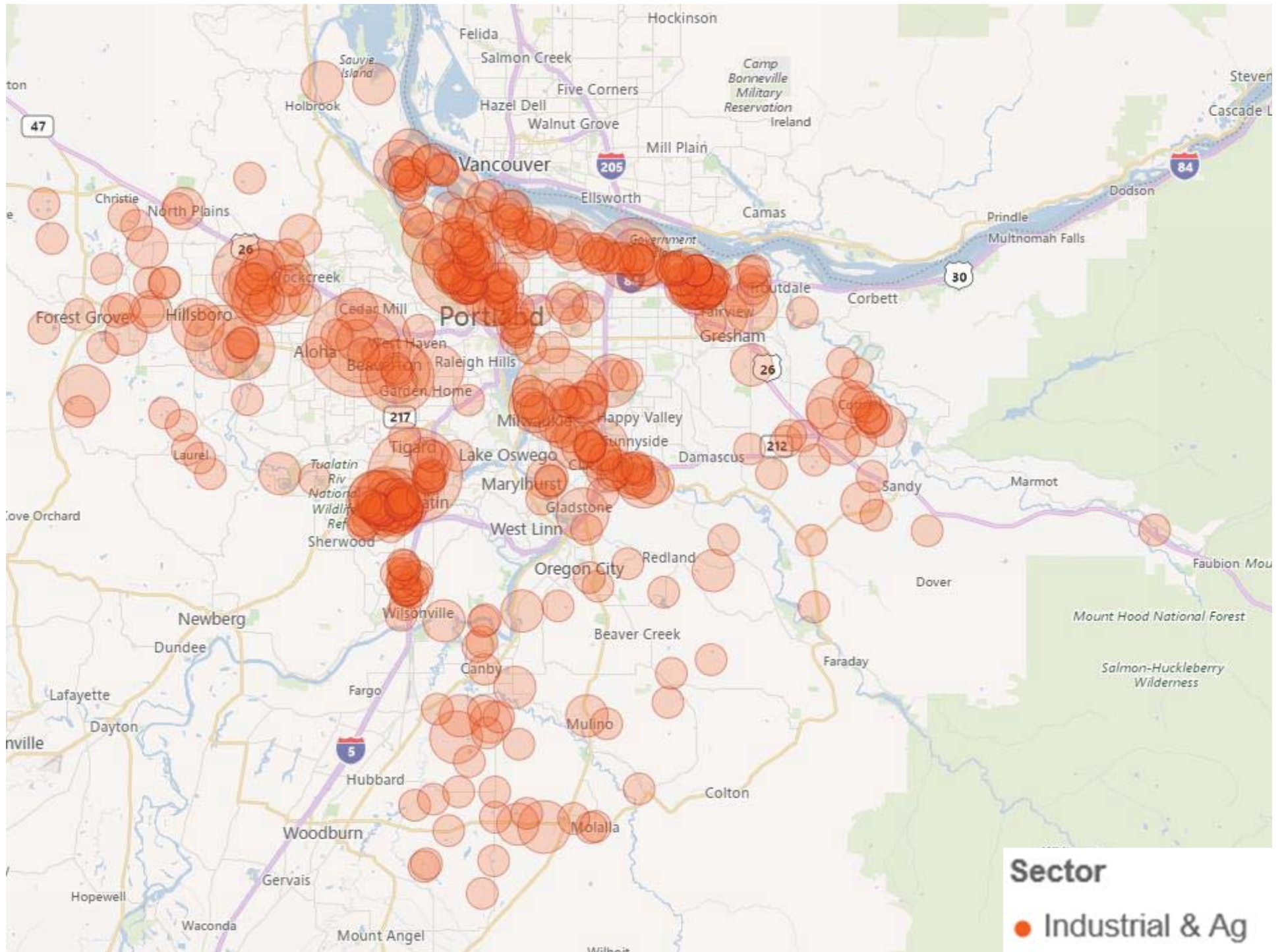


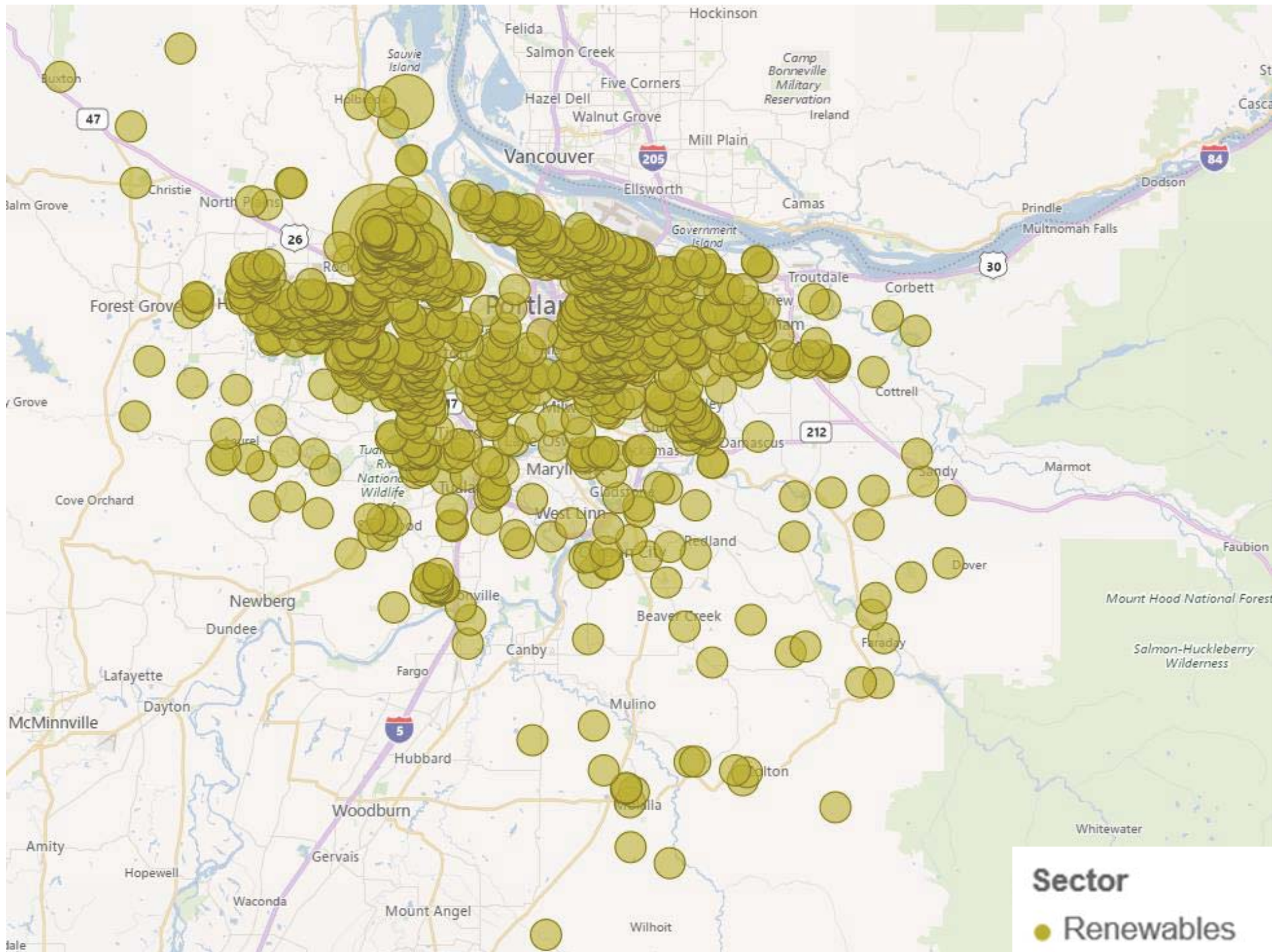
362M kWh saved

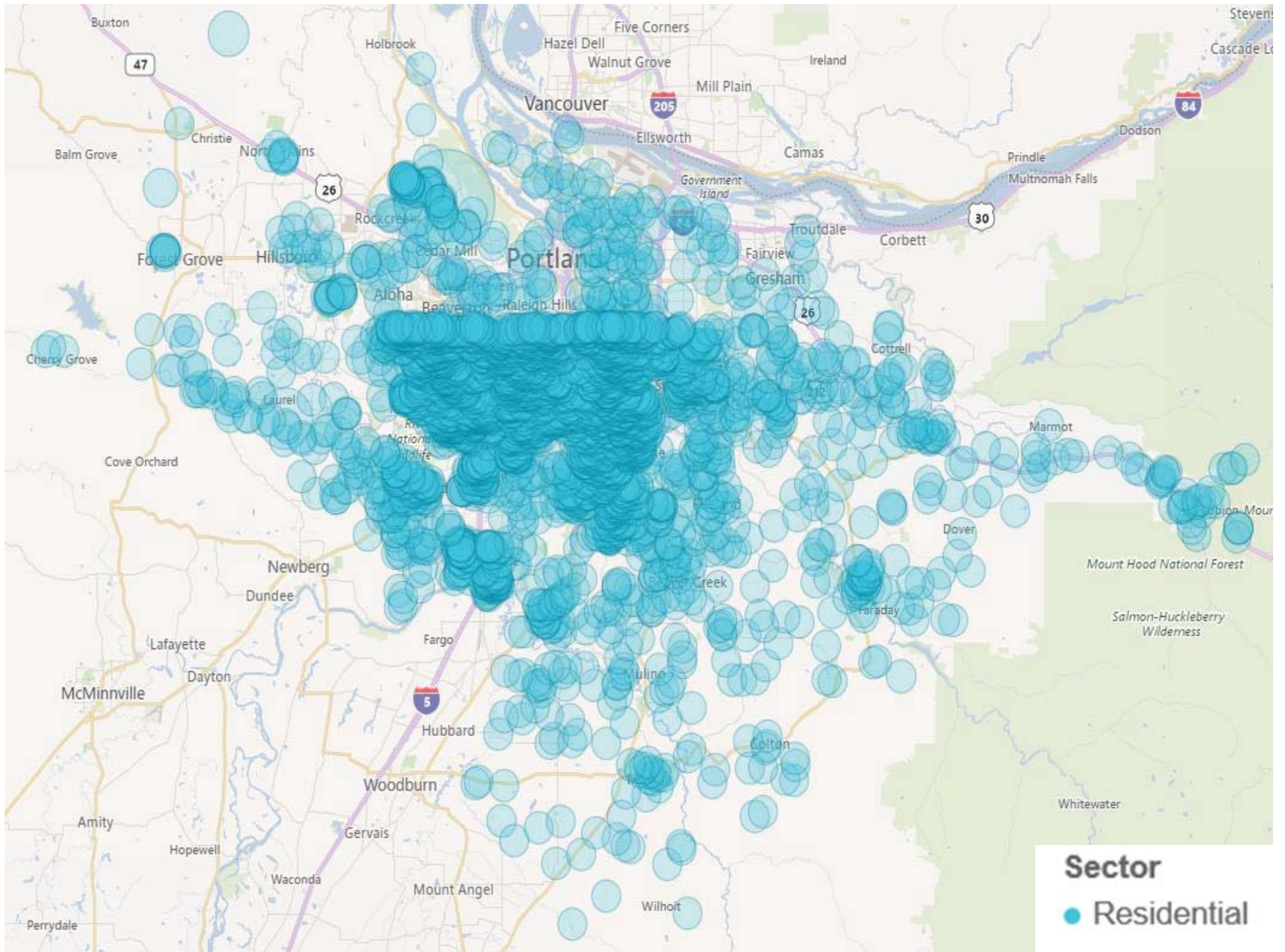


4.5M therms saved









2017 Accomplishments: Benton, Linn, Lane, Marion, Polk, Yamhill Counties



**More than \$15 million
incentives paid**



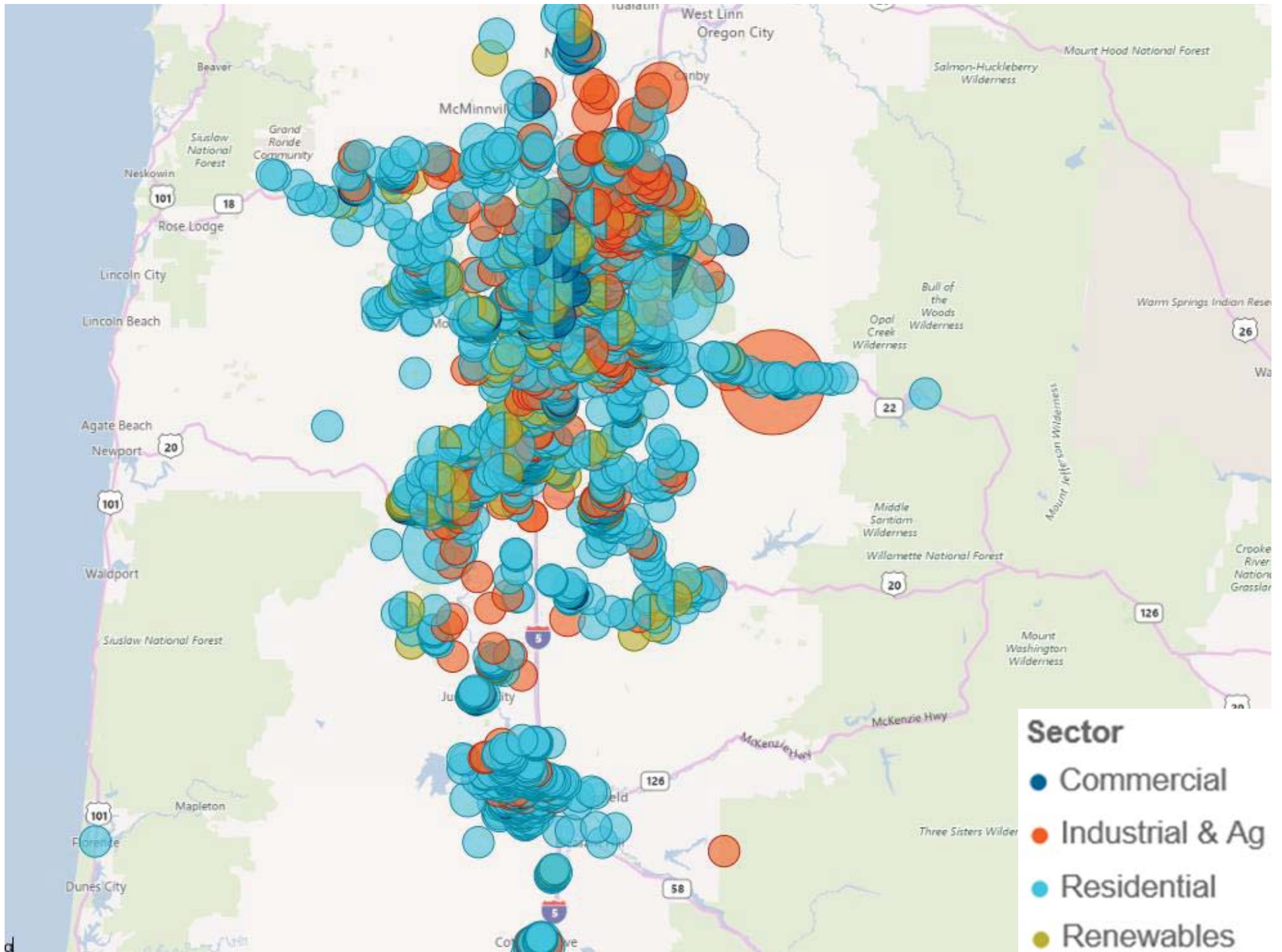
11,000 total sites served



123M kWh saved



977K therms saved



2018: What's Ahead

- New-and-improved Find-a-Contractor tool
- Trade ally survey





Growth Areas

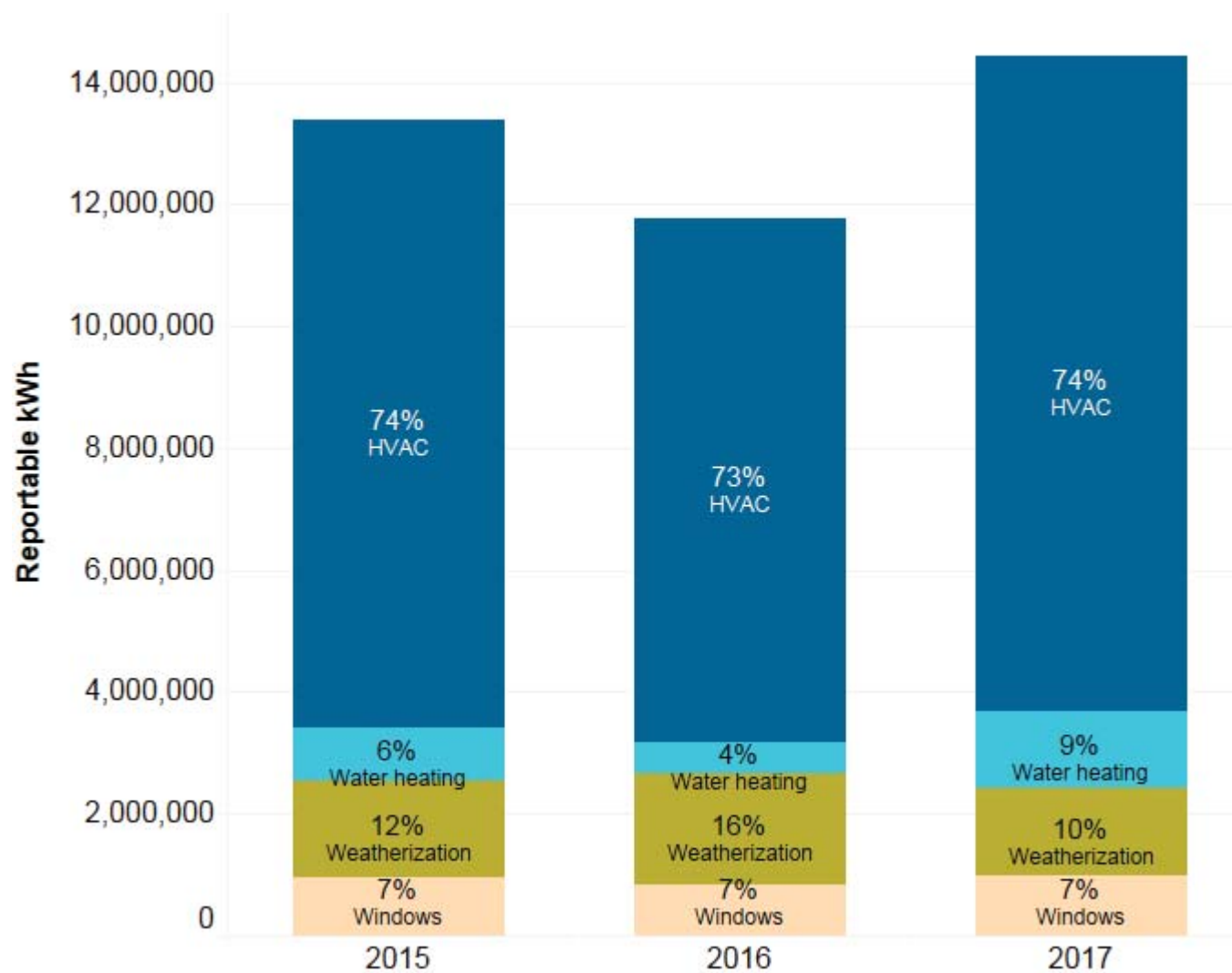
- Small business sector:
 - Small sites = <20,000 sq. ft.
 - 32 percent have worked with Energy Trust
 - **70 percent of small sites unserved**
- Large business sector:
 - 30 percent remaining market share
- Medium business sector:
 - 46 percent remaining market share



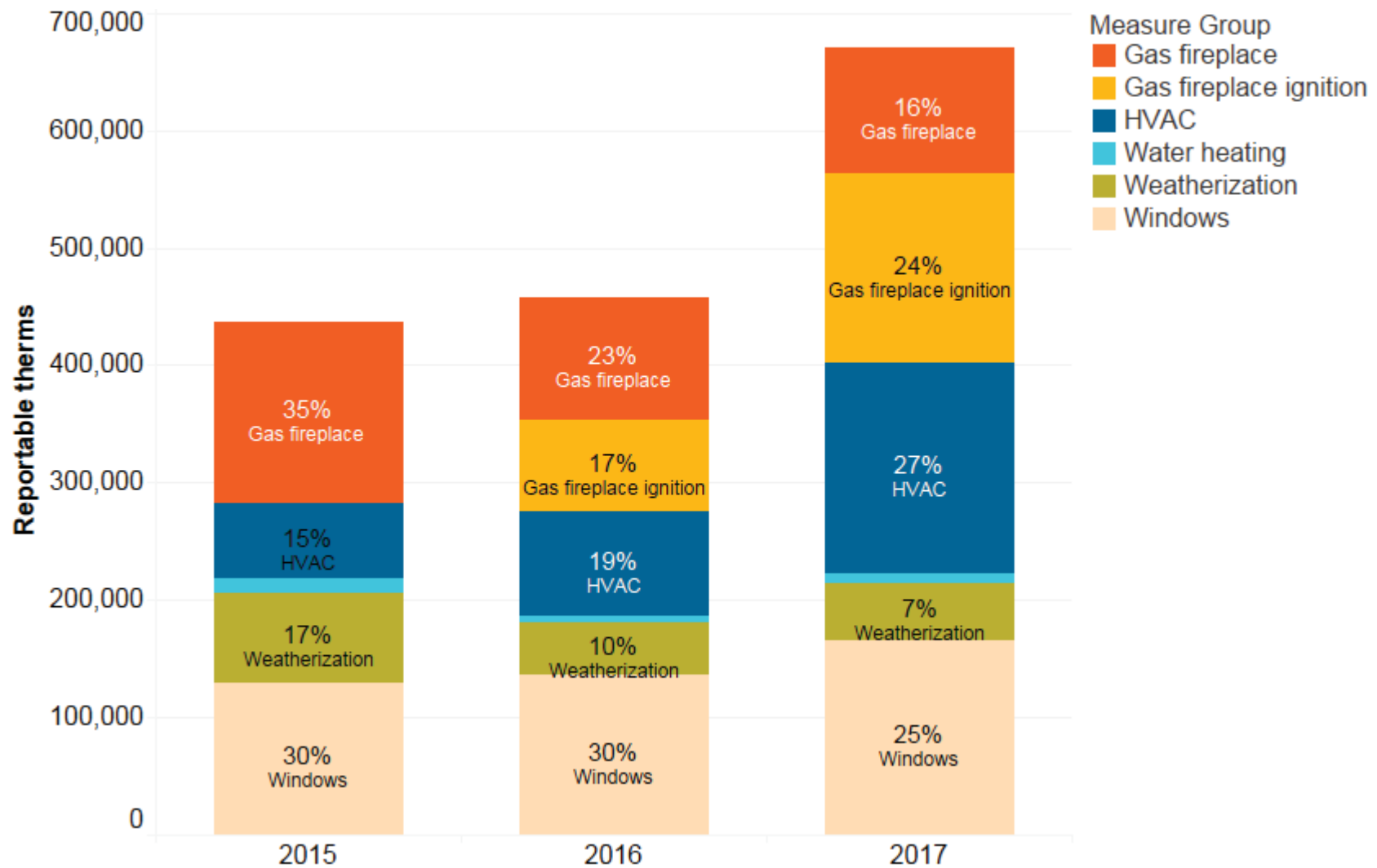
Mike Colgrove
Executive Director,
Energy Trust of Oregon

2017 Residential Home Retrofit & EPS™ New Construction

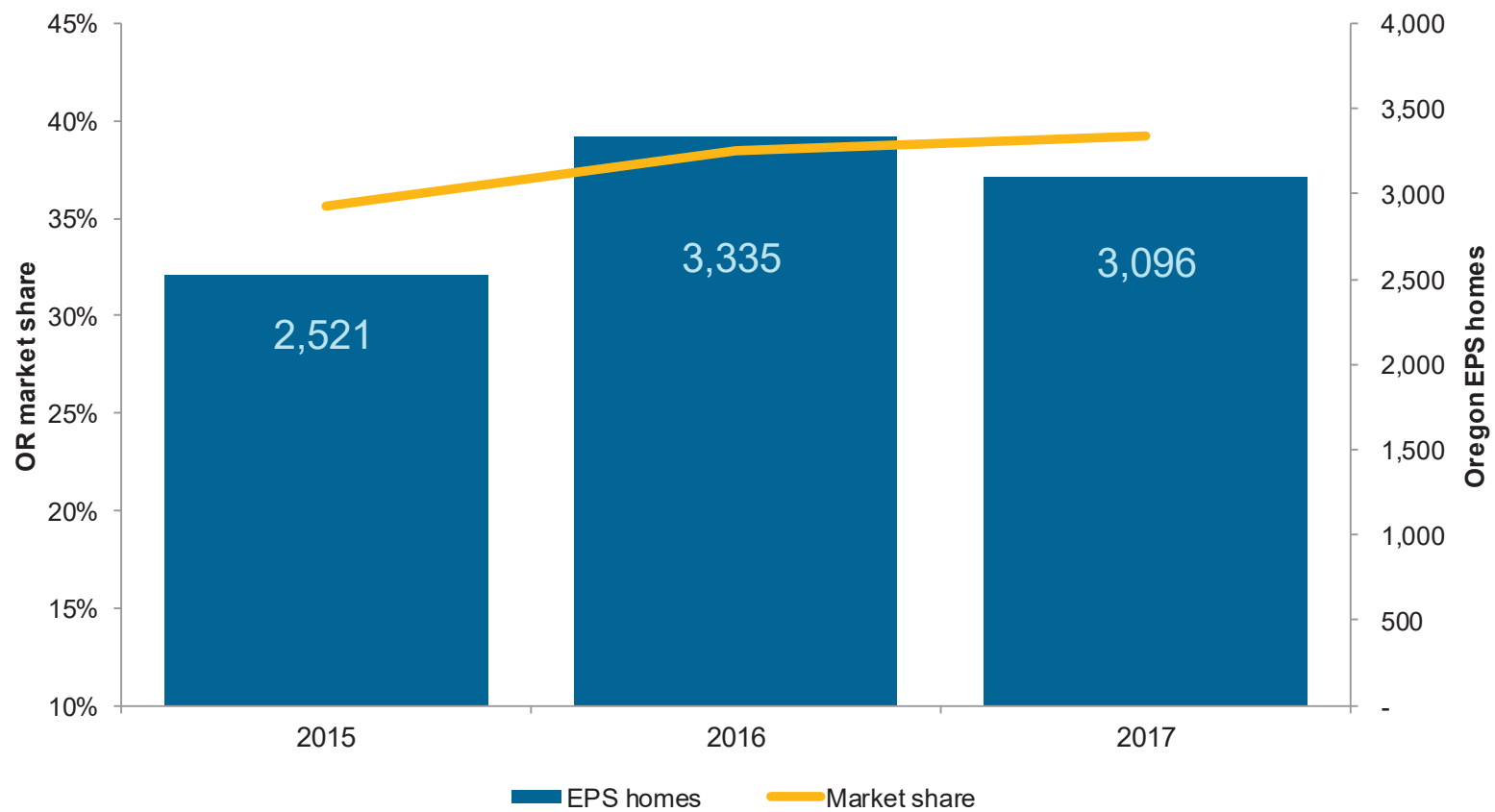
2017 Home Retrofit Drivers: Electric



2017 Drivers: Gas



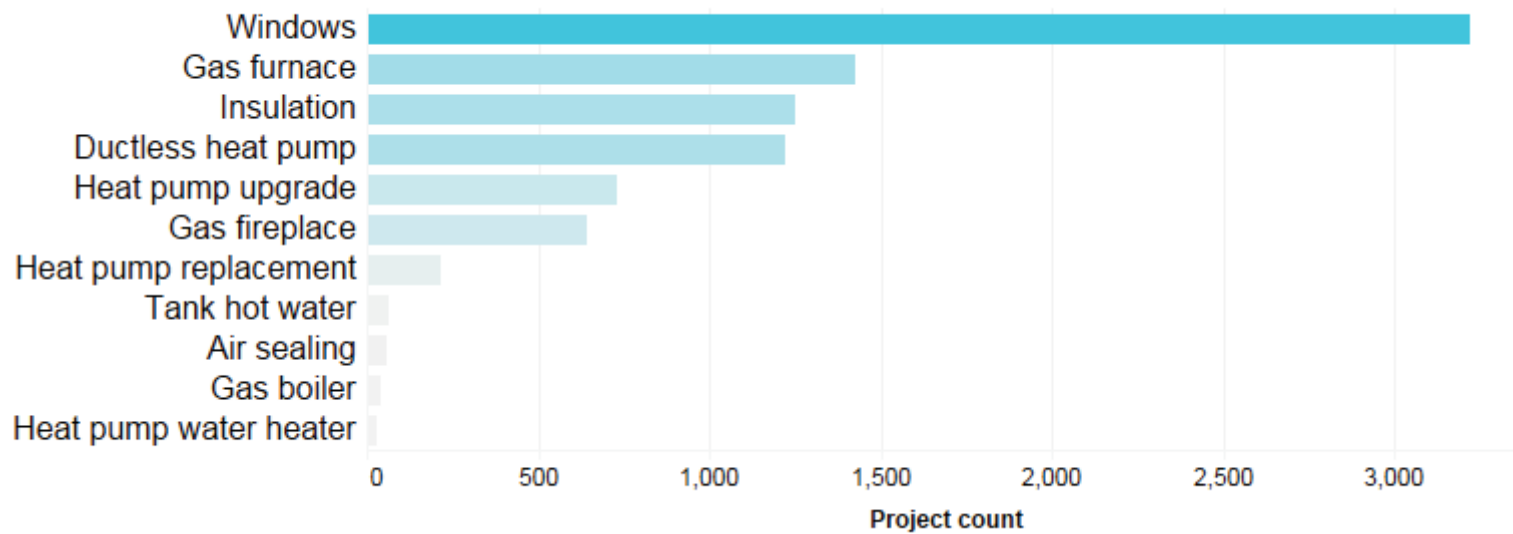
EPS Market Share



Portland Metro Trends

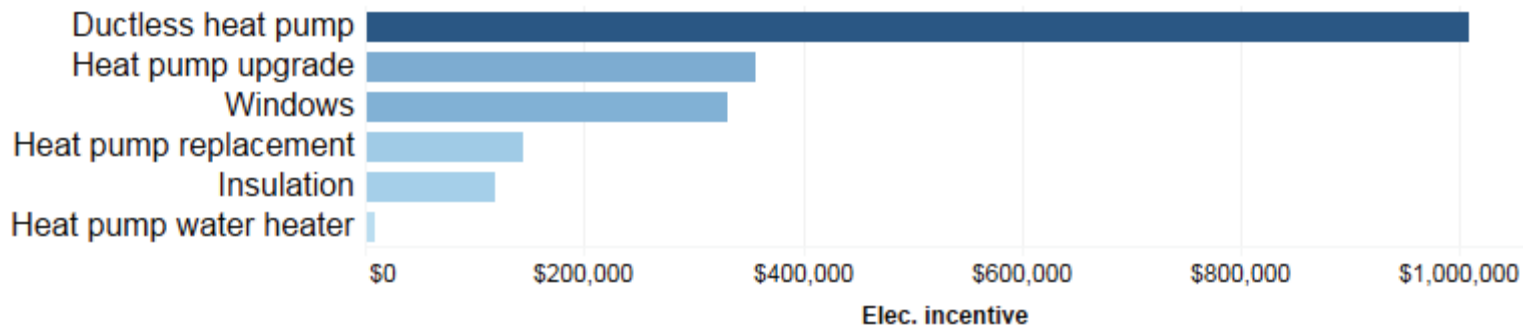
Home Retrofit – Portland Metro (projects)

Portland Metro Projects

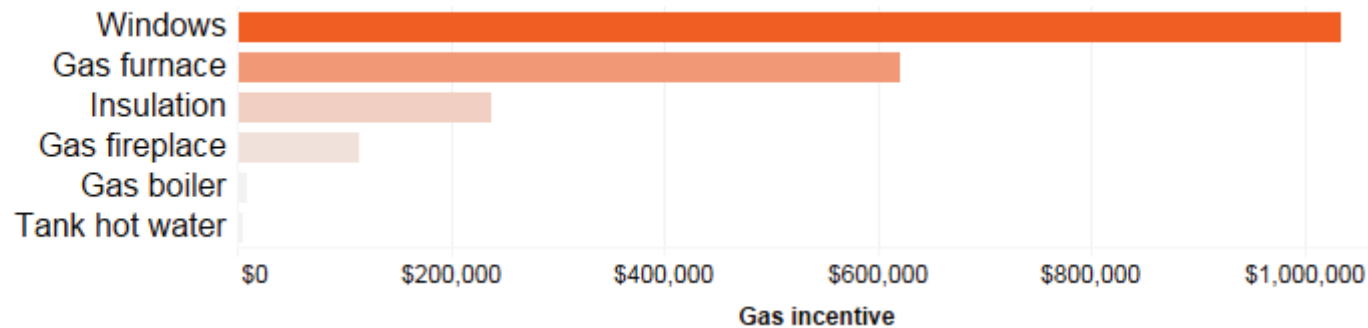


Home Retrofit – Portland Metro (incentives)

Portland Metro Elec. Incentive

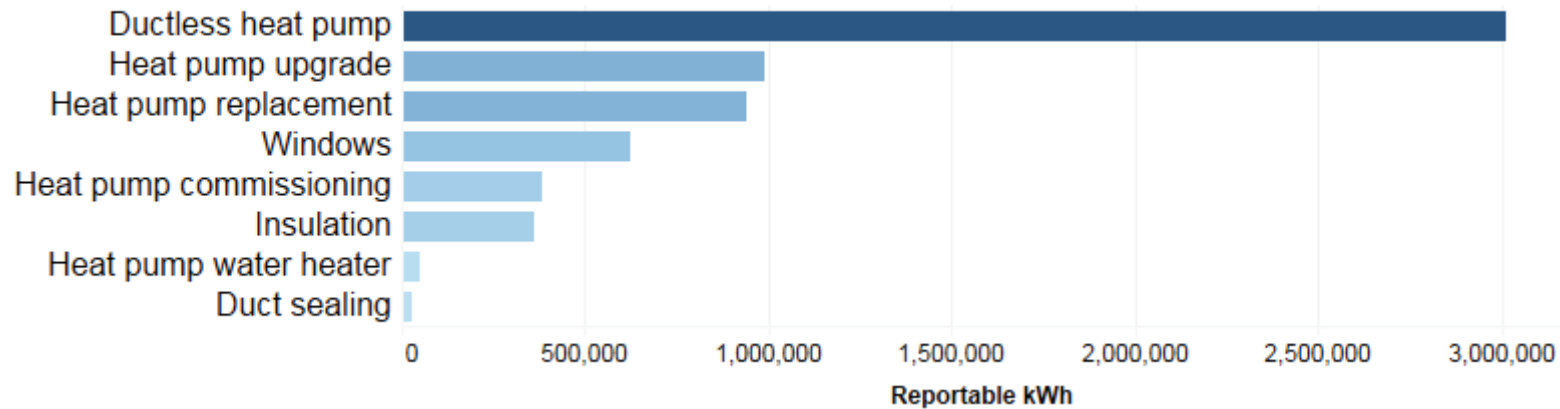


Portland Metro Gas Incentive

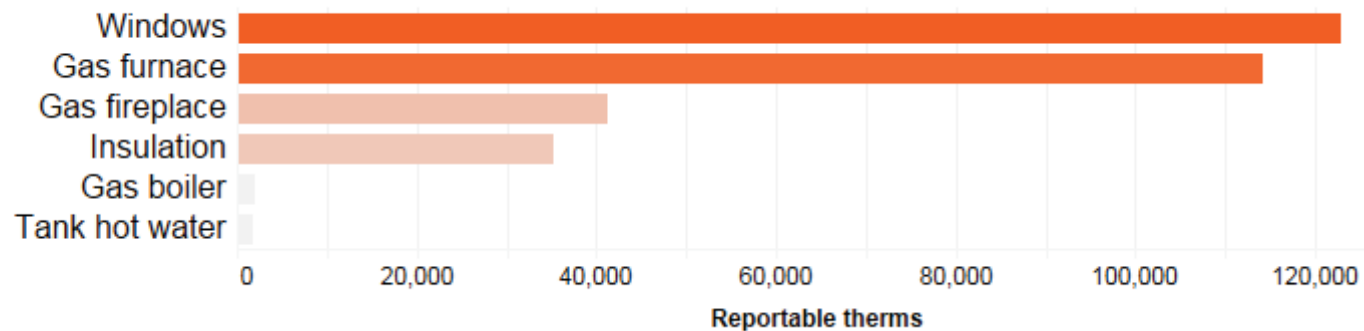


Home Retrofit – Portland Metro (savings)

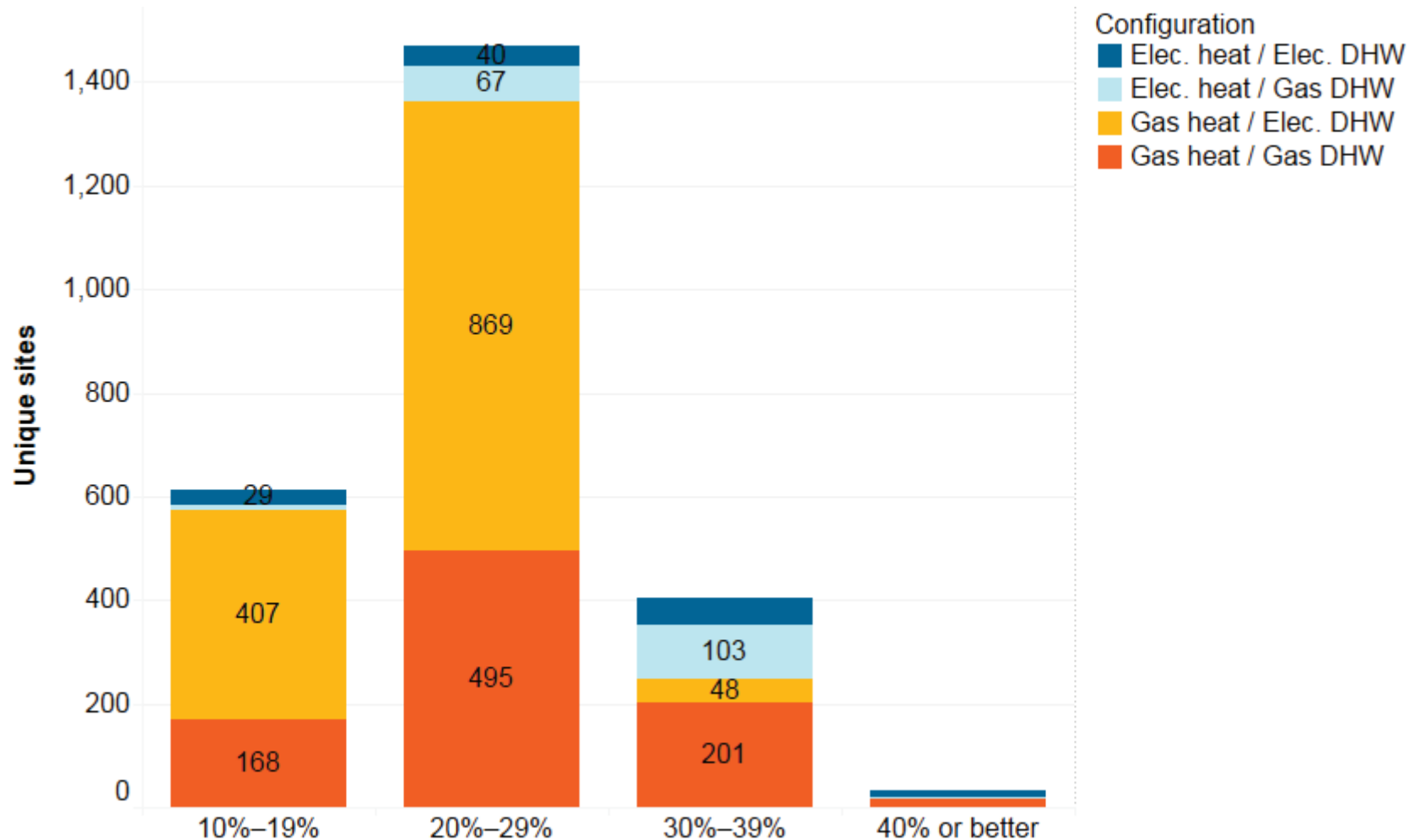
Portland Metro Elec. Measures



Portland Metro Gas Measures



Number of Homes by % improvement and home configuration: Portland Metro



2018 Priorities

2018 Priorities

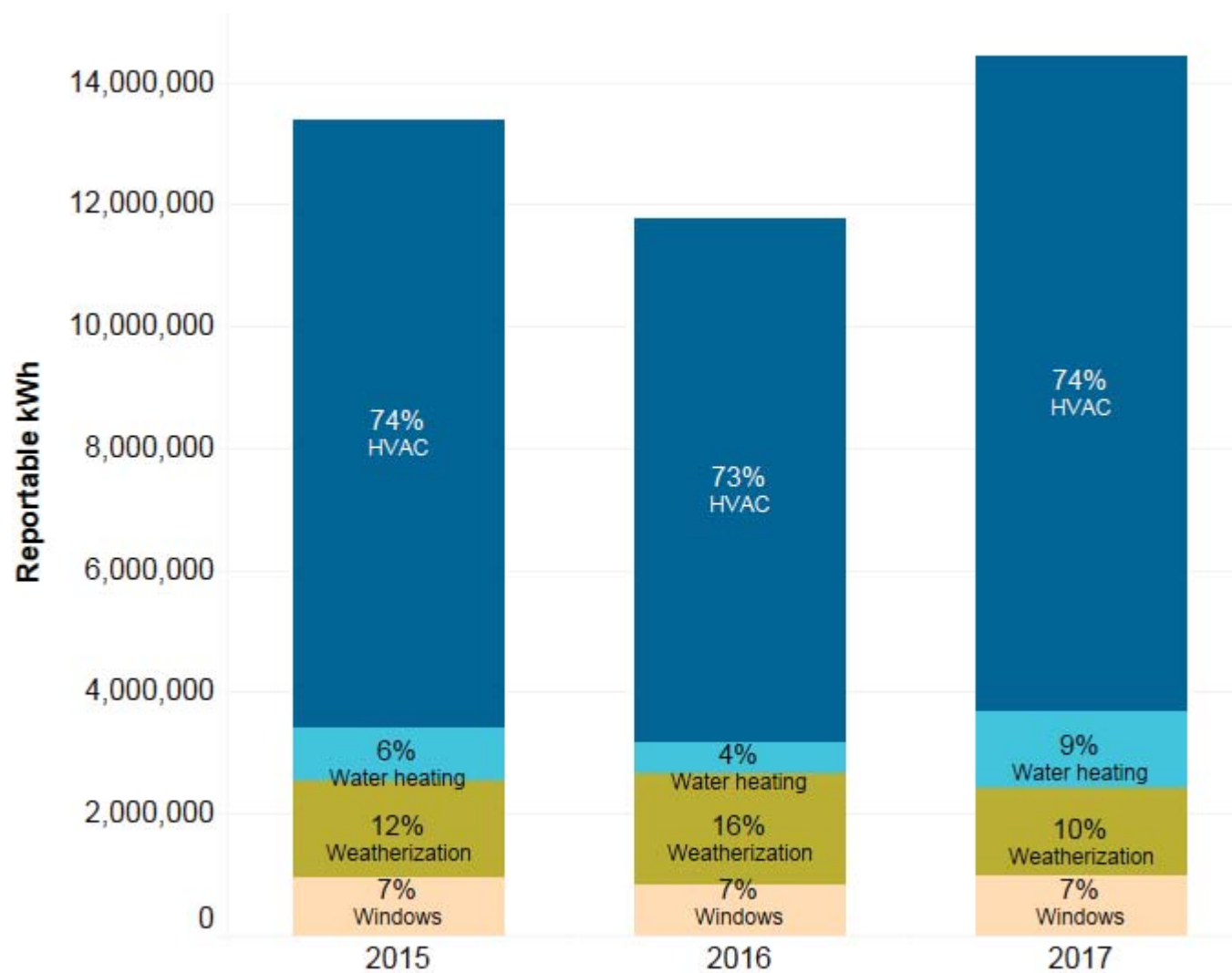
- Expand Participation
 - Targeted Marketing
 - New Opportunities: Manufactured Homes
 - Efficient Controls
 - Supply-Chain Offerings



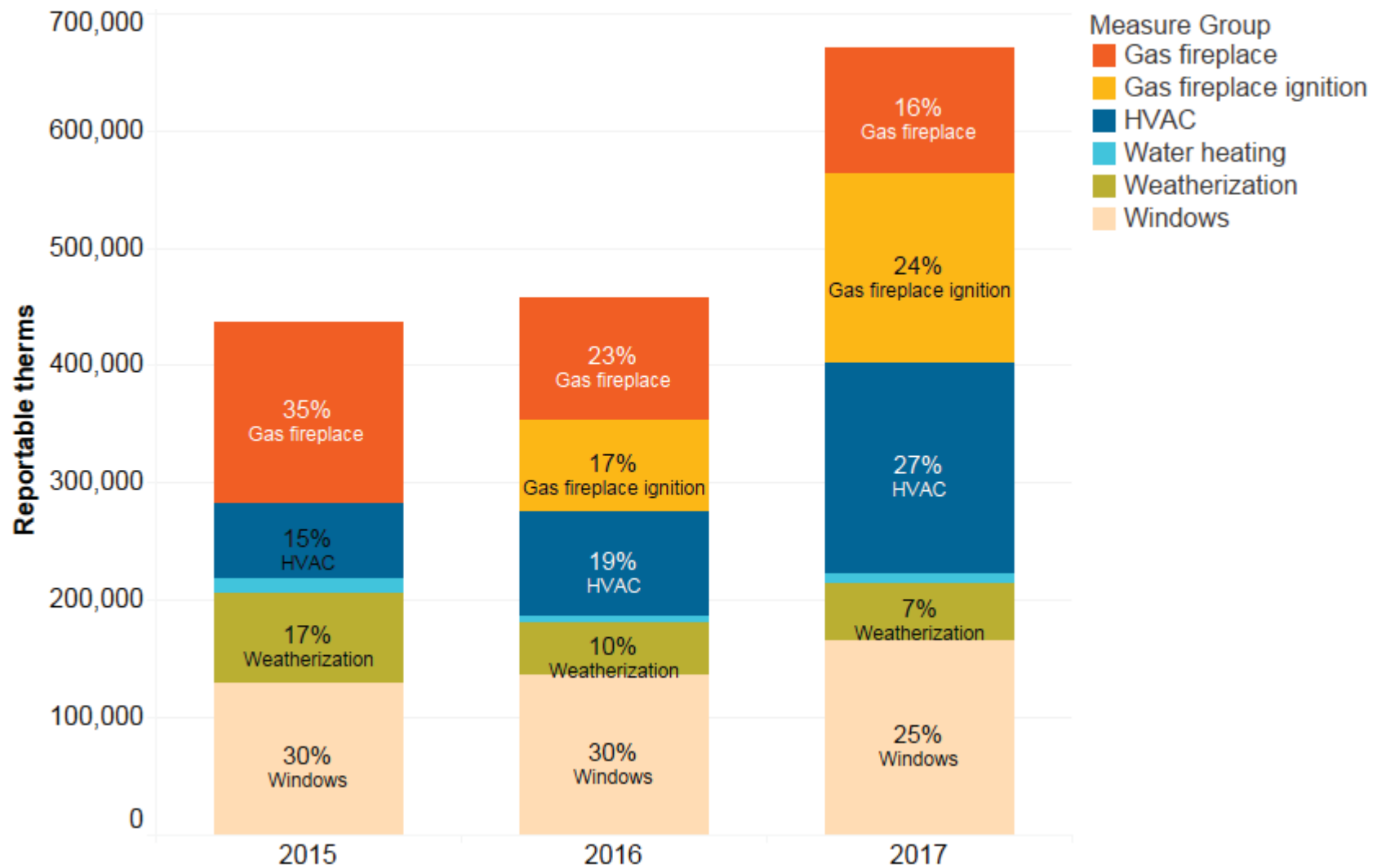
Trade ally forums

2017 Residential Home Retrofit & EPS™ New Construction

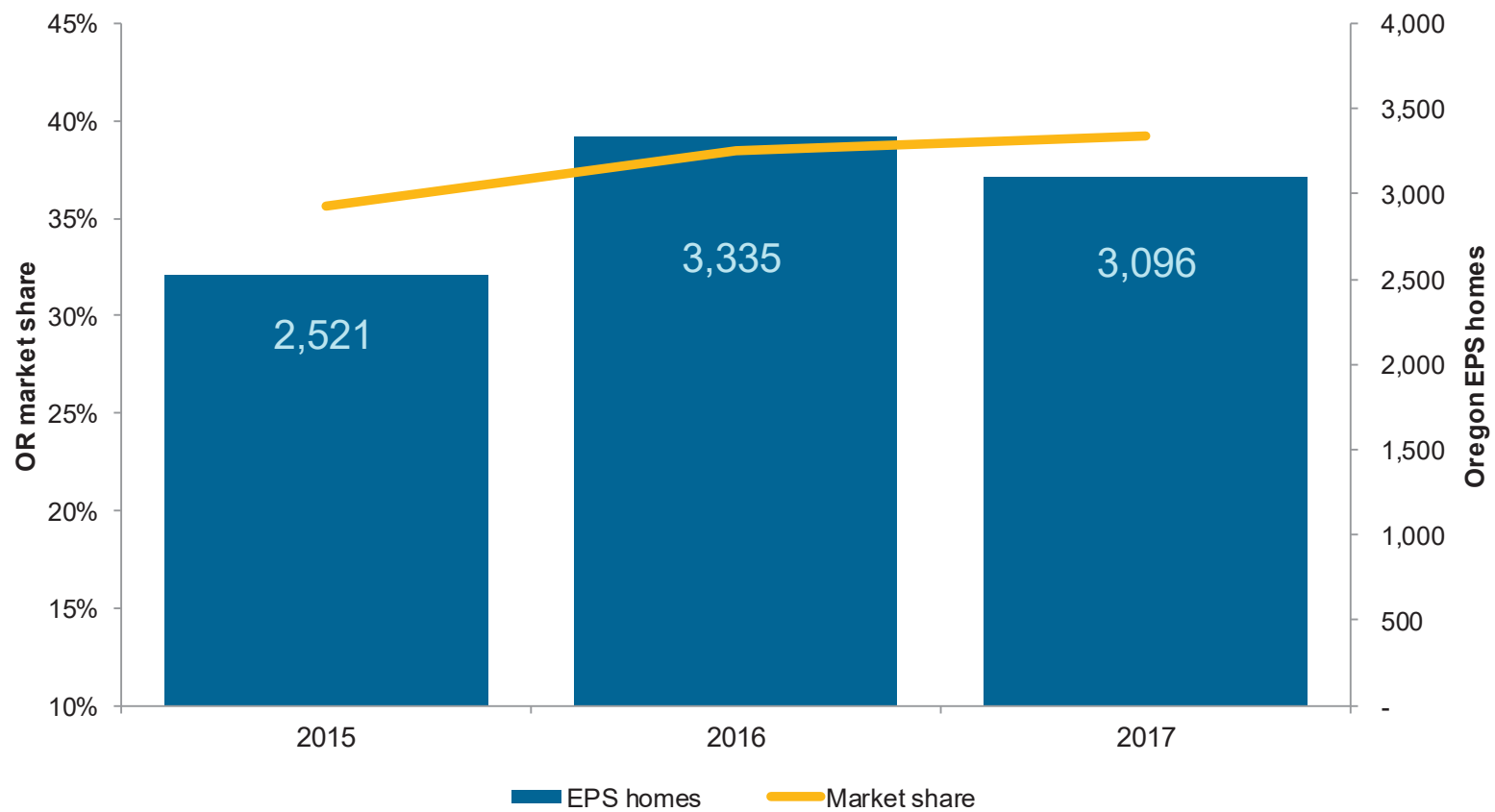
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2017 Drivers: Gas



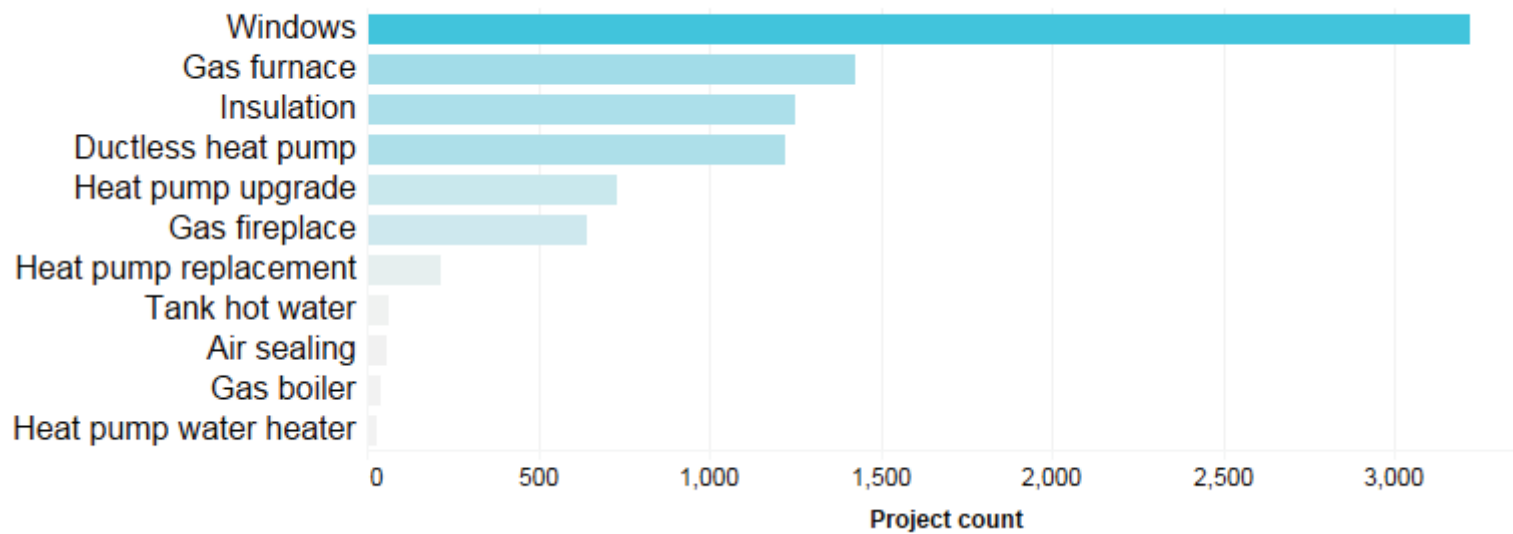
EPS Market Share



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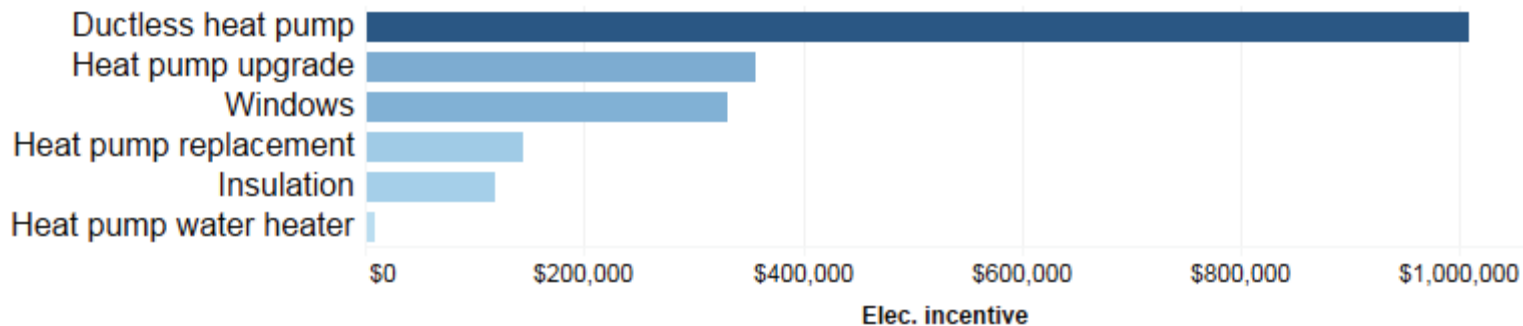
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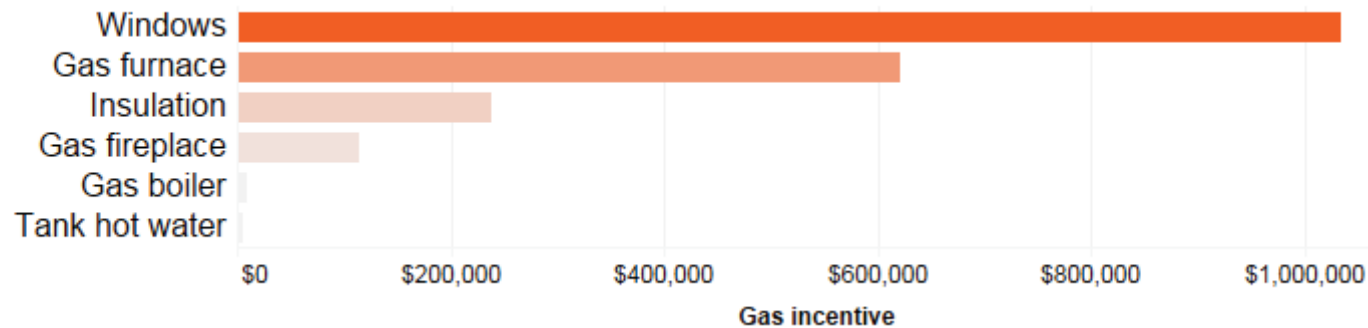


Home Retrofit – Portland Metro (incentives)

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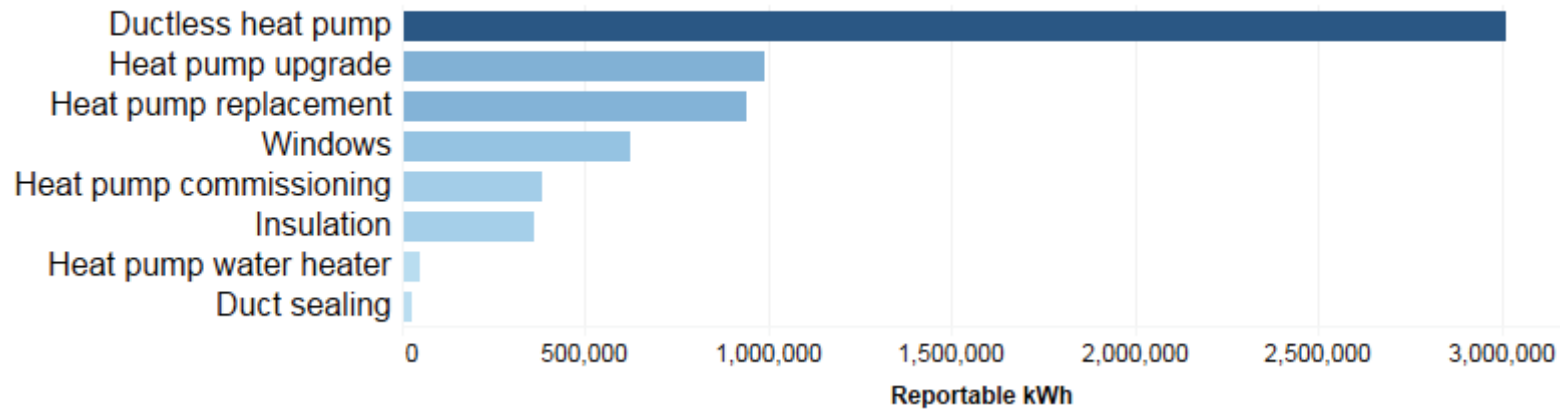


Portland Metro Gas Incentive

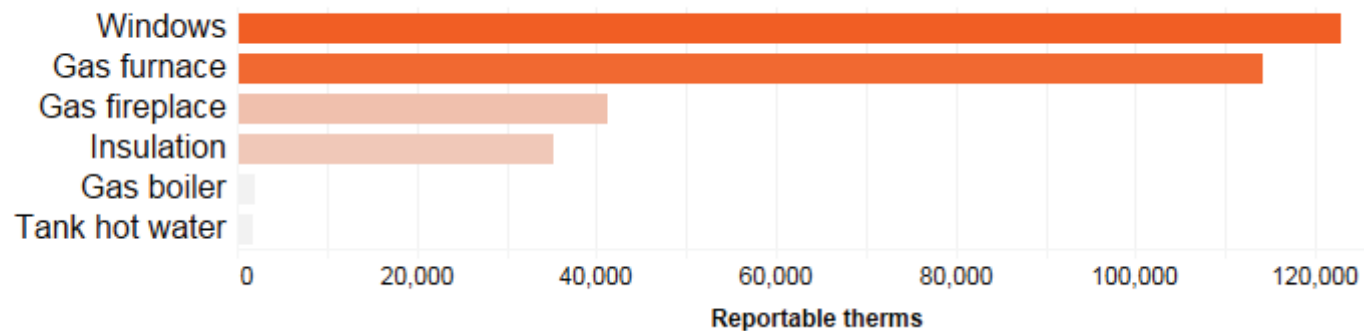


Home Retrofit – Portland Metro (savings)

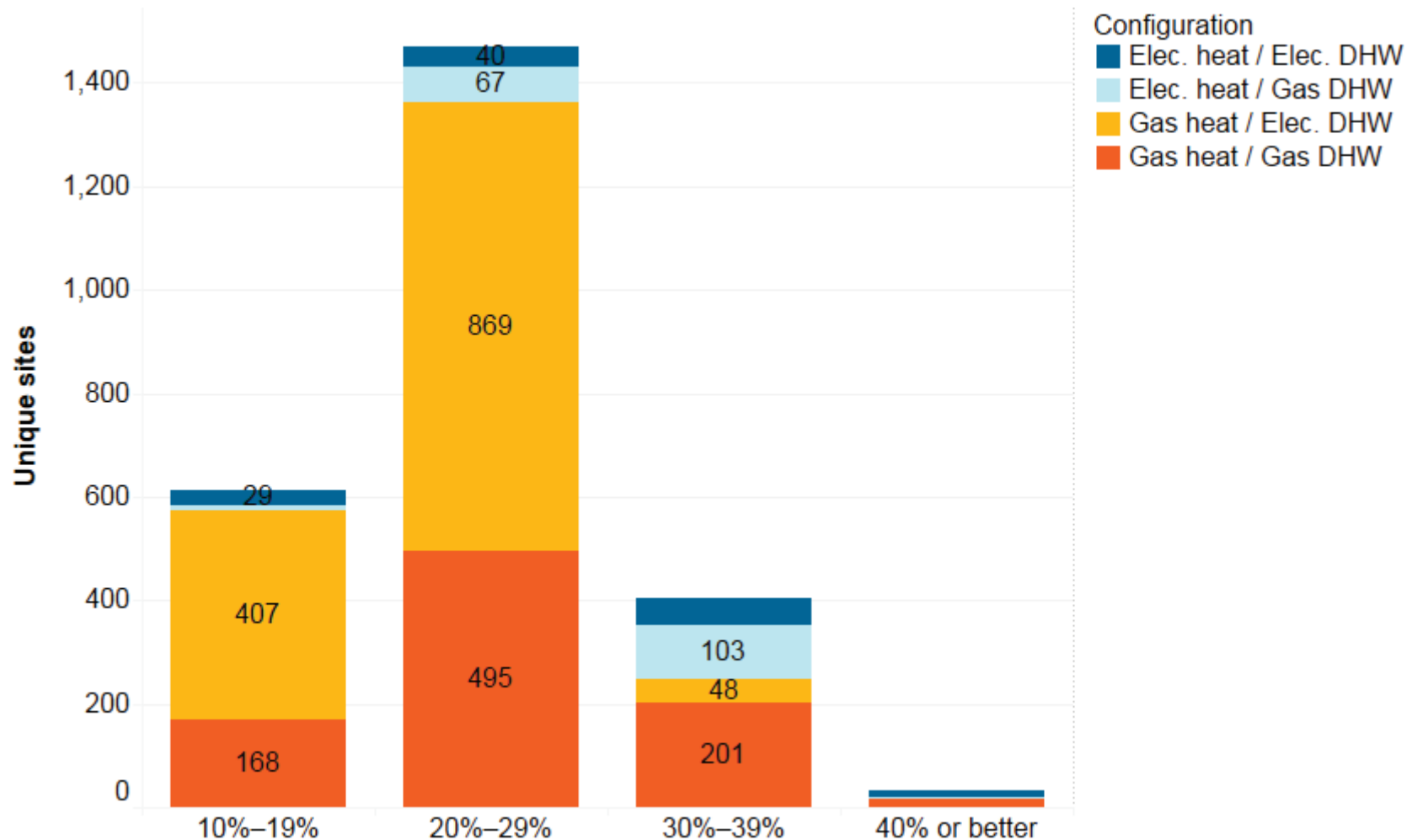
Portland Metro Elec. Measures



Portland Metro Gas Measures



Number of Homes by % improvement and home configuration: Portland Metro



2018 Priorities

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 - Targeted Marketing
 - New Opportunities: Manufactured Homes
 - Efficient Controls
 - Supply-Chain Offerings





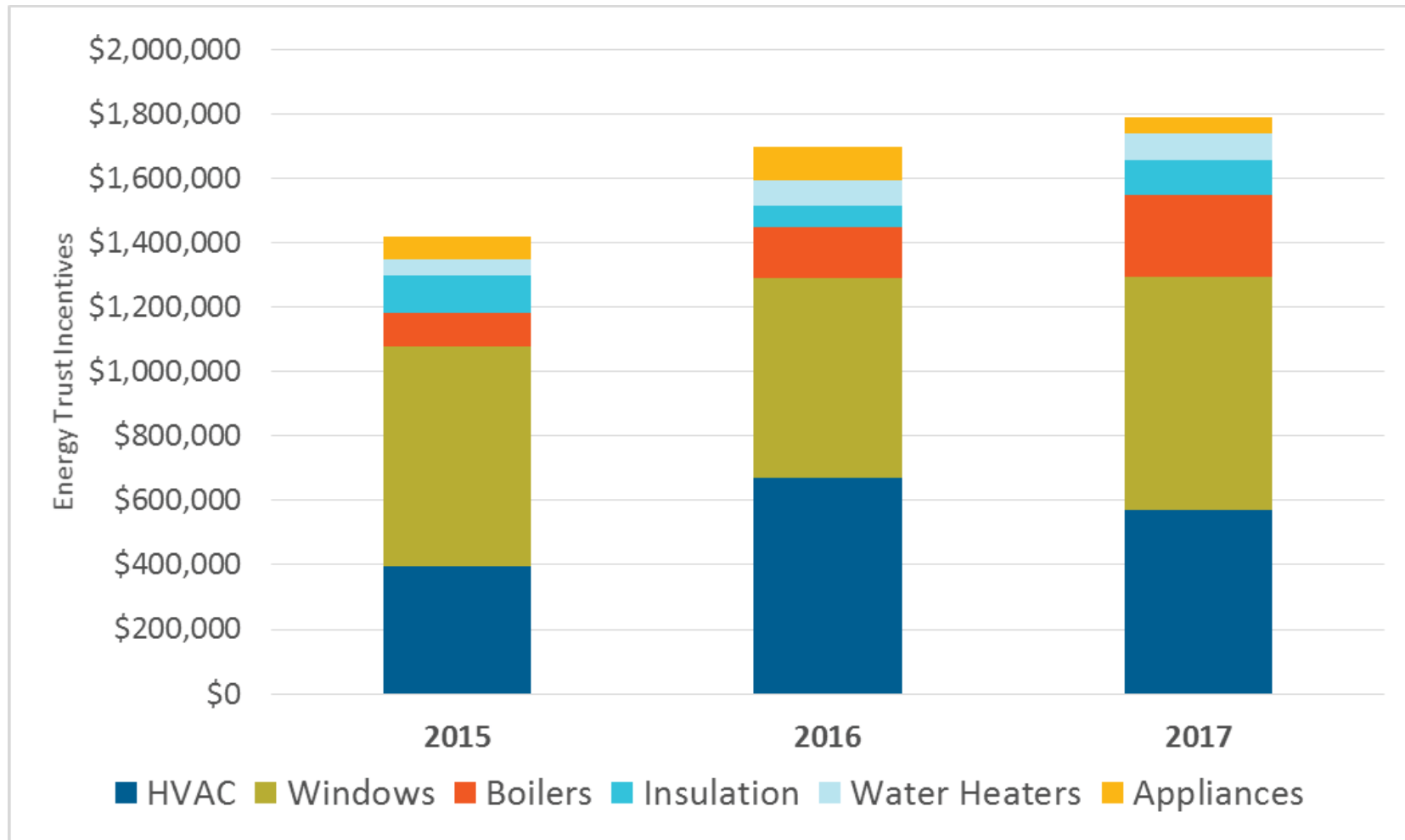
Existing Multifamily Program

Trade Ally Forums

April 2018

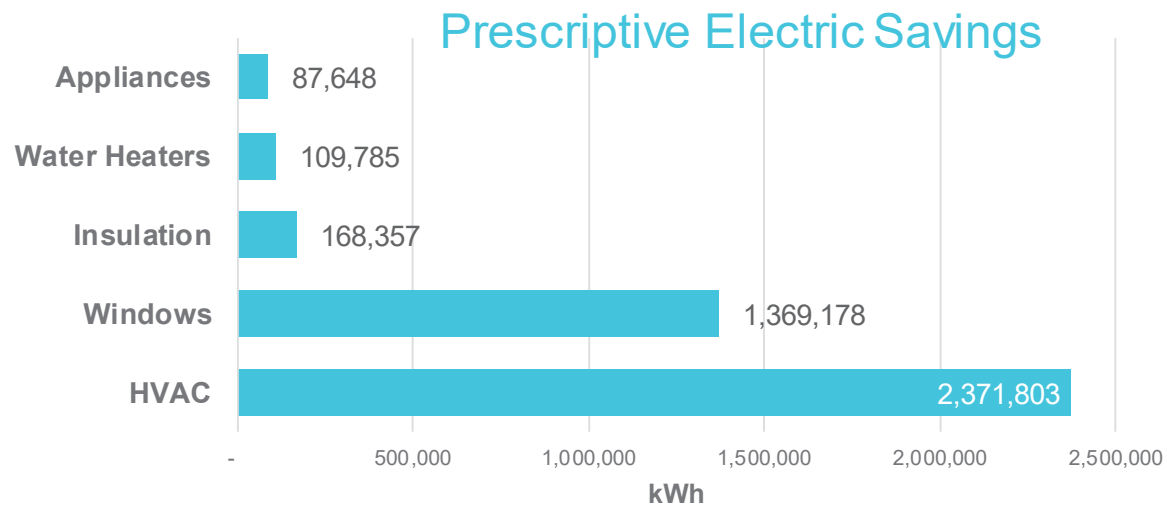


Multifamily Prescriptive Incentive Trends



1,804 prescriptive projects in 2017
\$1.7M prescriptive incentives paid

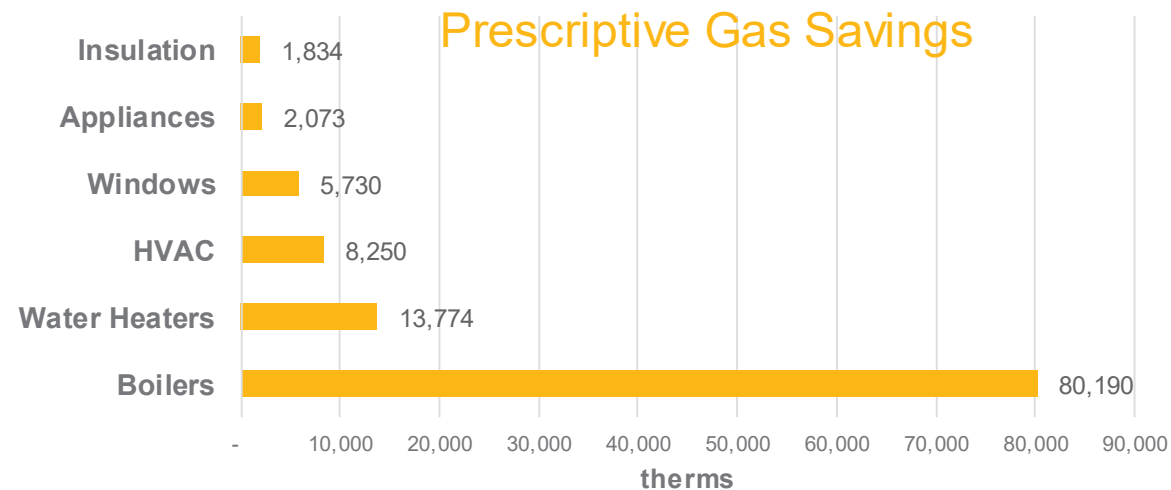
2017 Existing Multifamily Savings



2017 Electric Savings by Track

Lighting	39%
Direct Install	33%
Prescriptive	25%
Custom	3%

Total 16,052,407 kWh



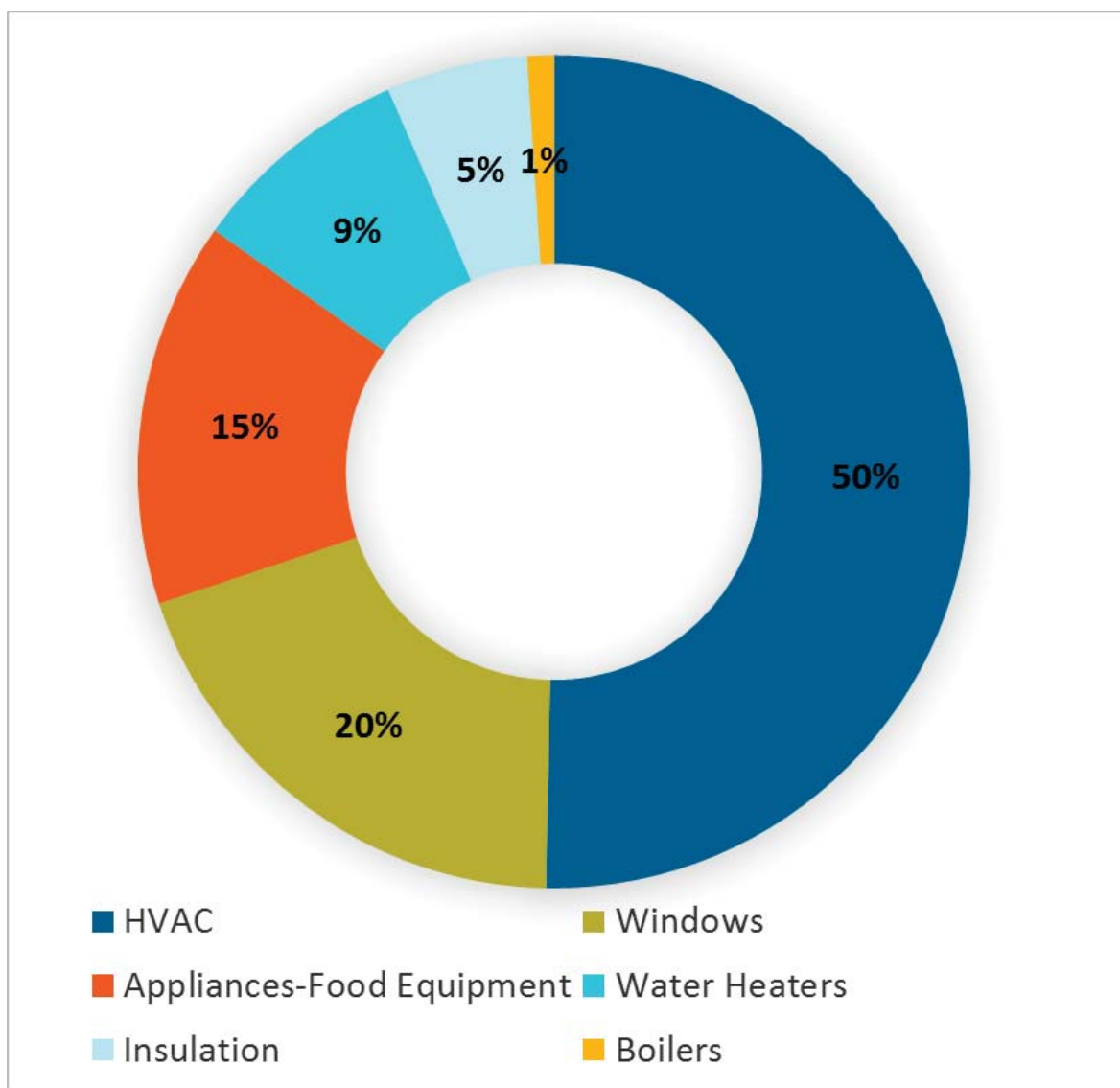
2017 Gas Savings by Track

Prescriptive	62%
Direct Install	24%
Custom	14%

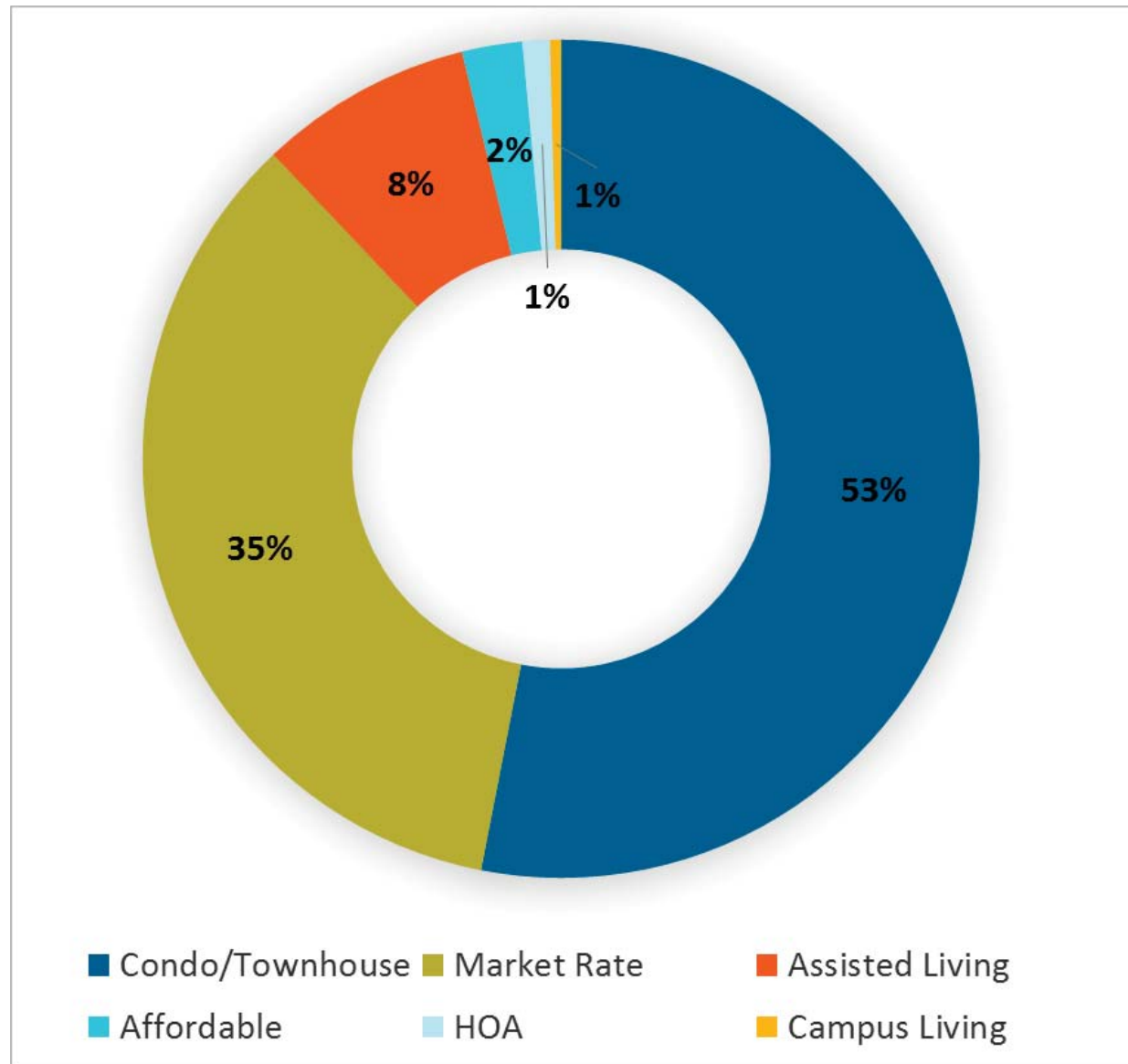
Total 181,642 therms

2017 Existing Multifamily prescriptive projects Portland Metro

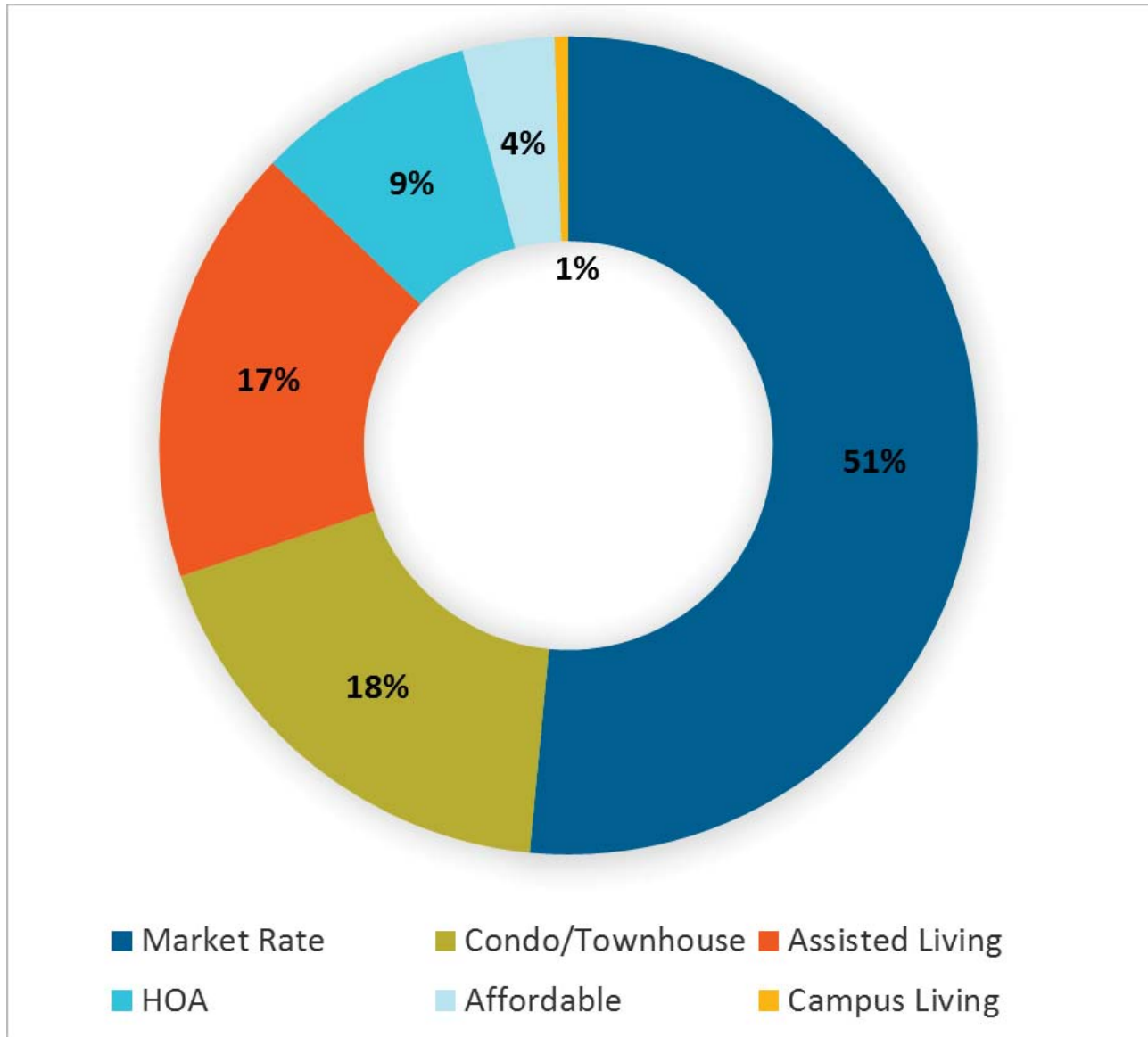
Measure Group	Project Count
HVAC	733
Windows	285
Appliances	218
Water Heaters	126
Insulation	80
Boilers	15



2017 Existing Multifamily projects by sector Portland Metro



2017 Existing Multifamily incentives by sector Portland Metro



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

Existing Multifamily – SW Washington

As of January 1, 2018:

- NW Natural customers in SW Washington
 - Condo, townhome, duplex, triplex, fourplex

Incentives available:

- Smart thermostat
- Gas Fireplace
- Gas Furnace
- Tankless Water heater

Contact: Eric Falk, Washington Account Manager
eric.falk@clearesult.com



Thank you

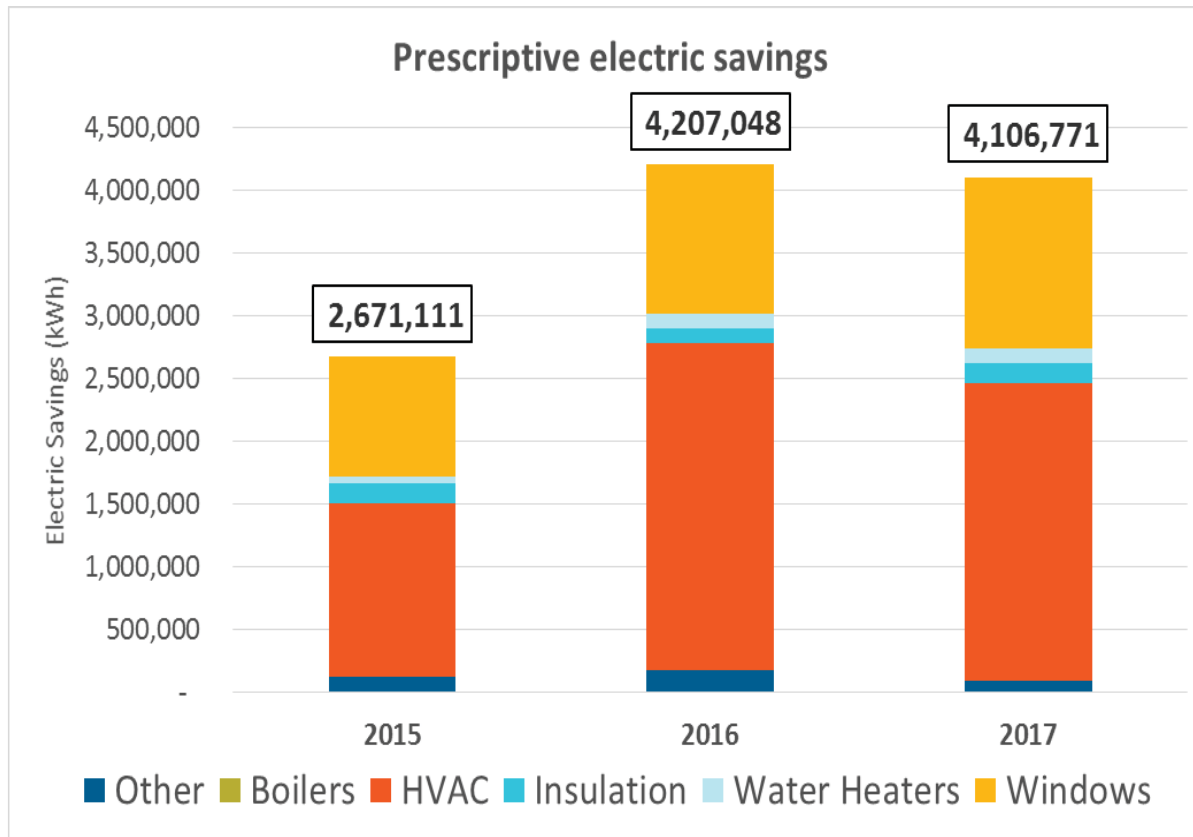
Kate Scott, Existing Multifamily Program Manager

kate.scott@energytrust.org



ADDITIONAL SLIDES

Multifamily Electric Savings – Statewide



2017 Electric Savings by Track

Custom	3%
Direct Install	33%
Lighting	39%
Prescriptive	25%

Total 16,052,407 kWh

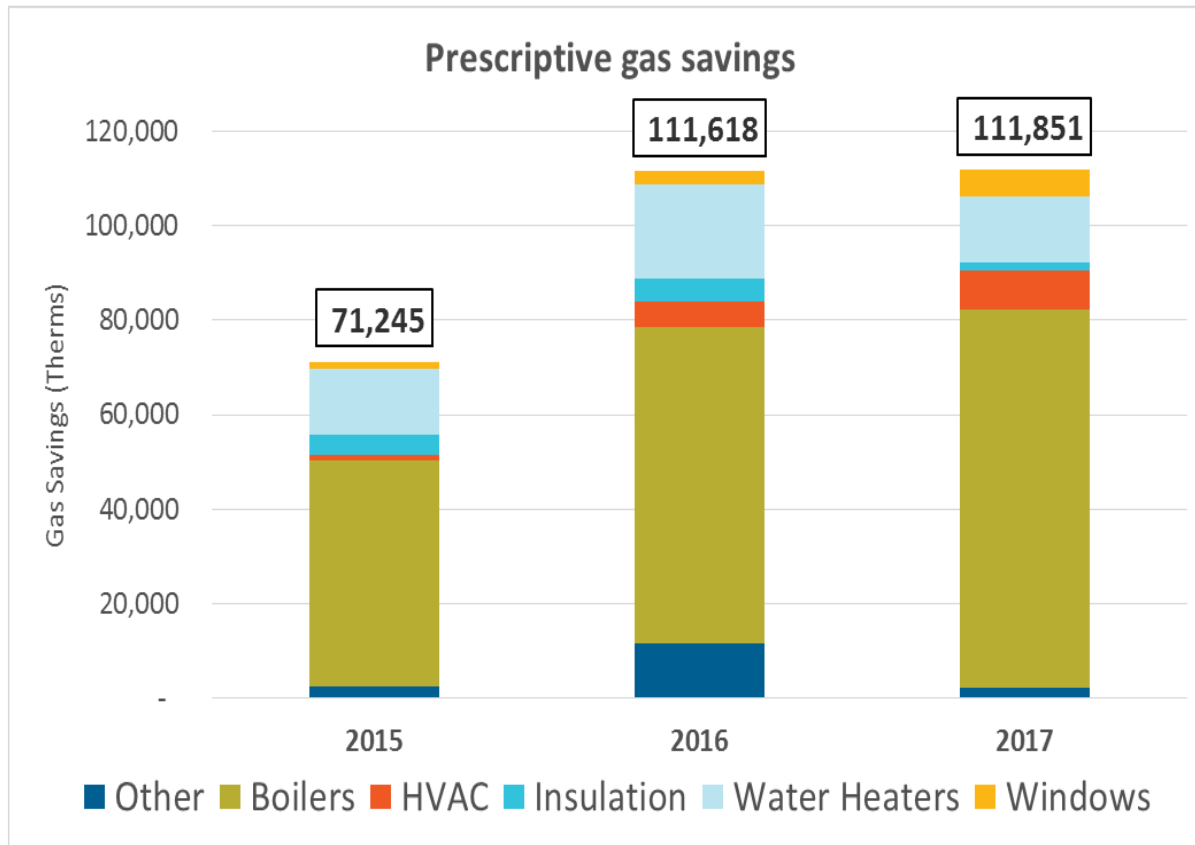
Incentives paid for prescriptive electric projects in 2017

\$3,250,301

Prescriptive electric projects in 2017

2790

Multifamily Gas Savings – Statewide



2017 Gas Savings by Track

Custom	14%
Direct Install	24%
Prescriptive	62%

Total 181,642 therms

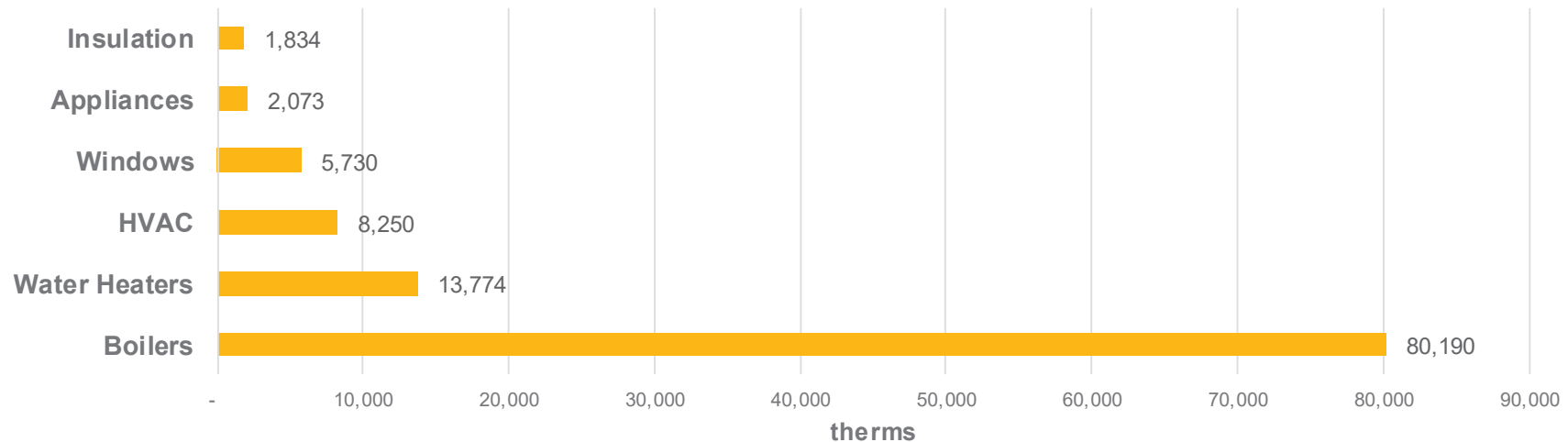
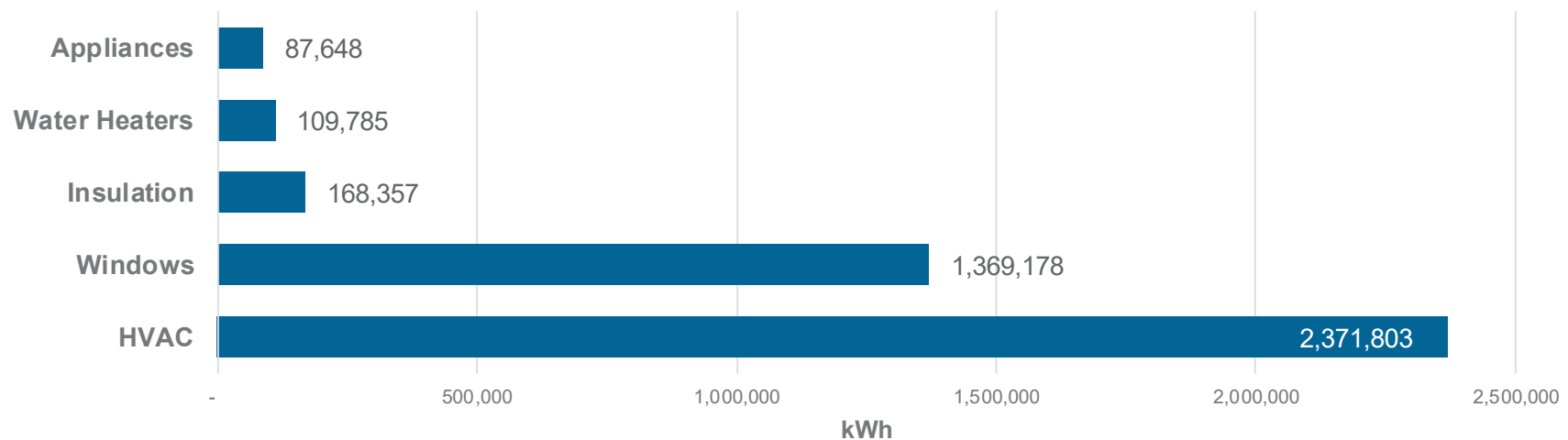
Incentives paid for prescriptive gas projects in 2017

\$592,807

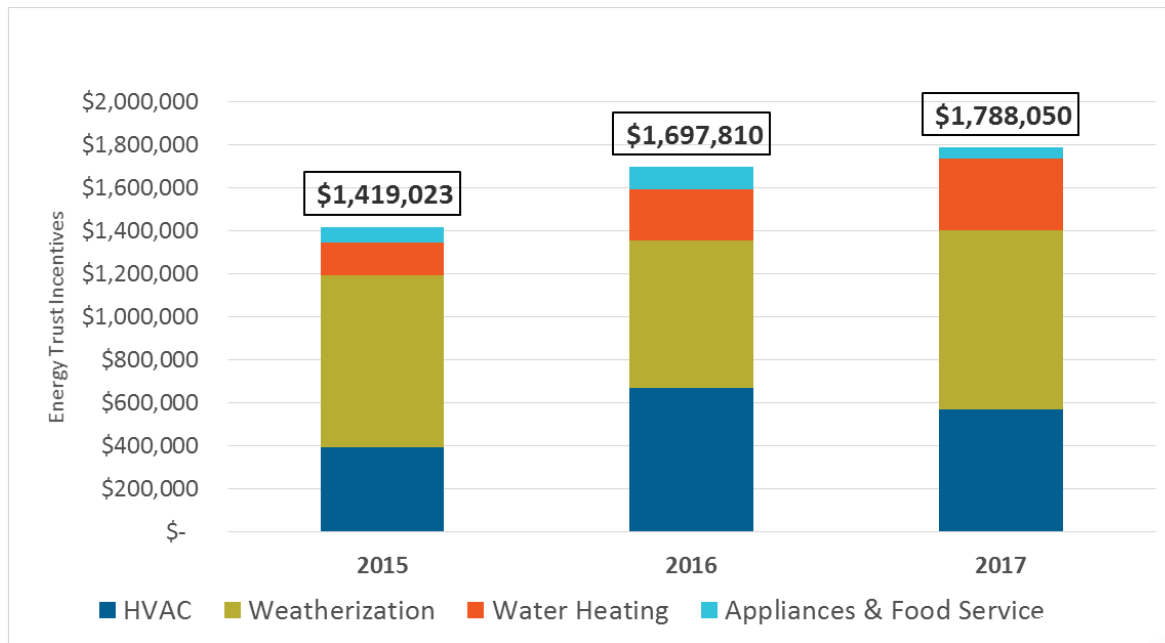
Prescriptive gas projects in 2017

611

2017 Prescriptive Savings - Statewide



Prescriptive Incentives - Statewide

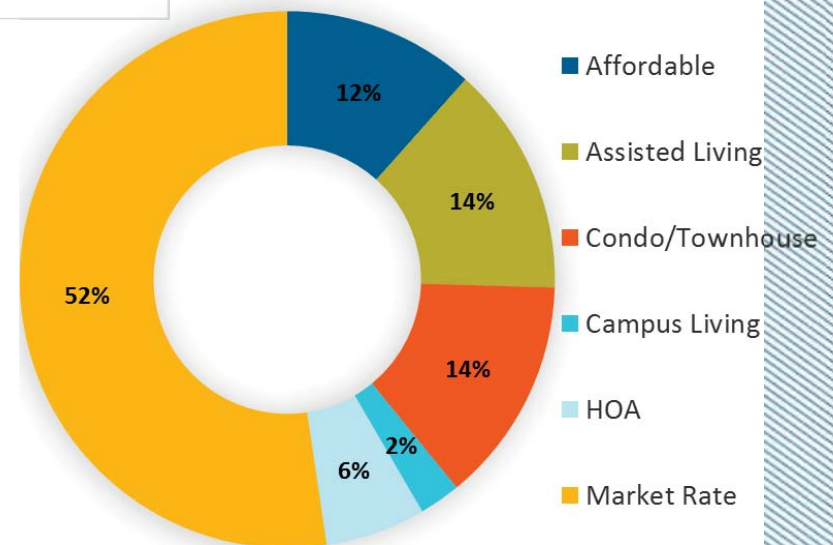


Prescriptive projects submitted in 2017

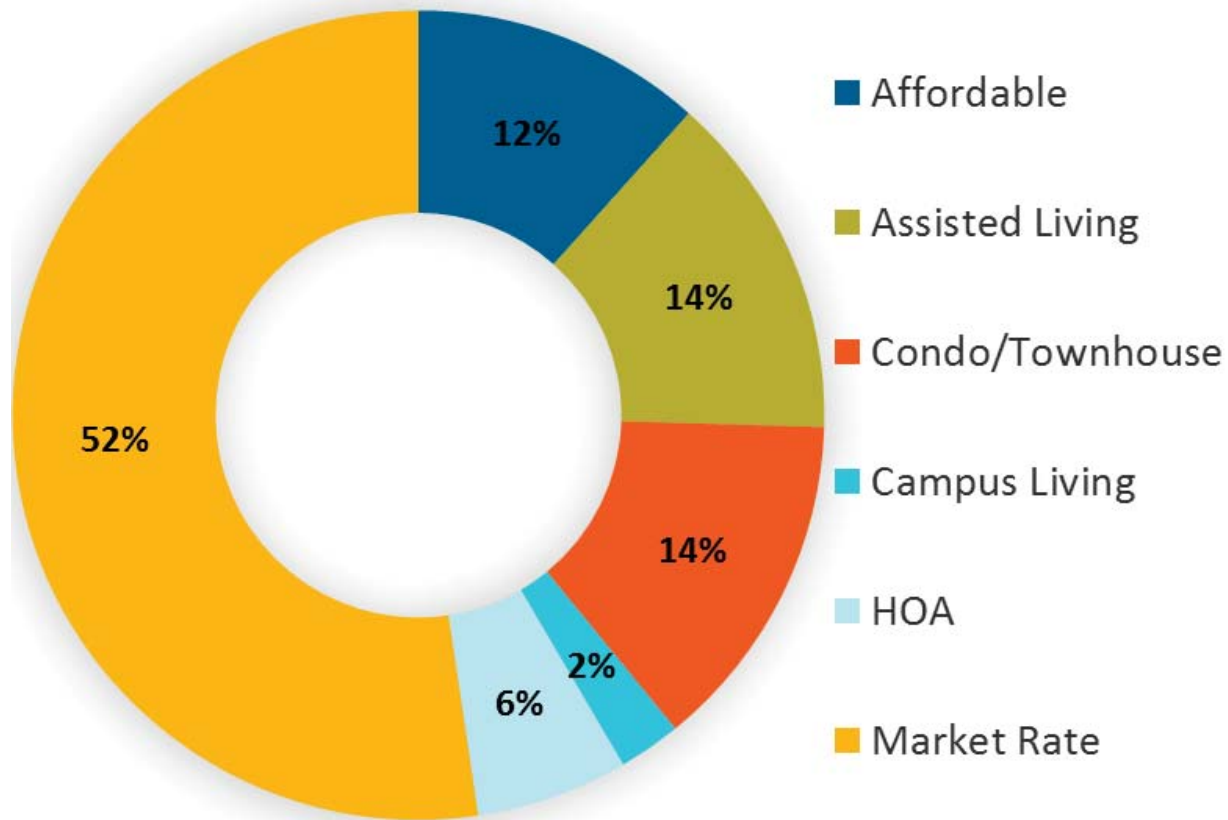
3401

Top Prescriptive Measures 2017

Ductless heat pumps – 1,1.5 & 2 ton
Windows – stacked structure single pane
Condensing boiler
Condensing tank water heater



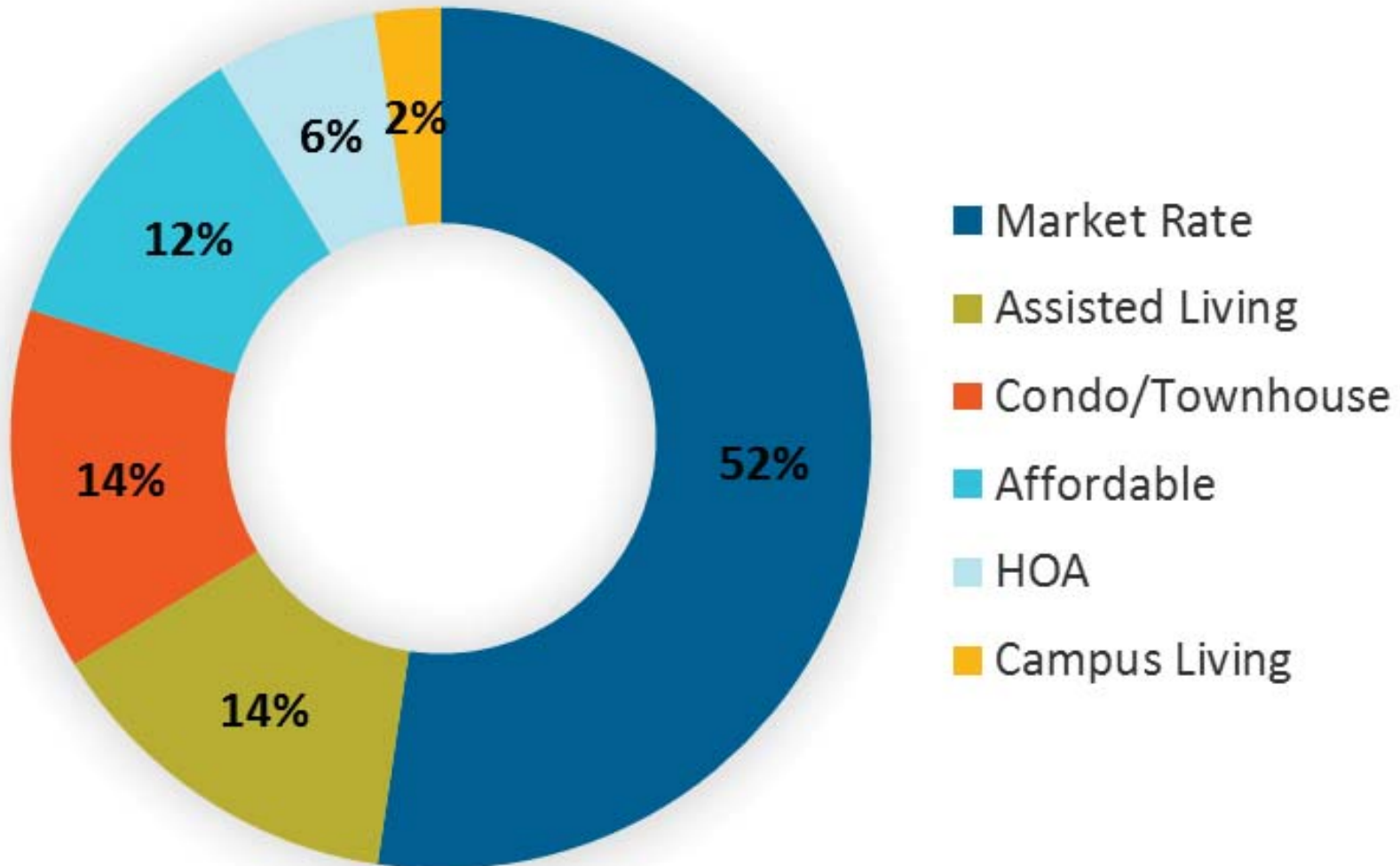
2015-2017 Incentives by sector – Statewide



Top Measures 2015-2017

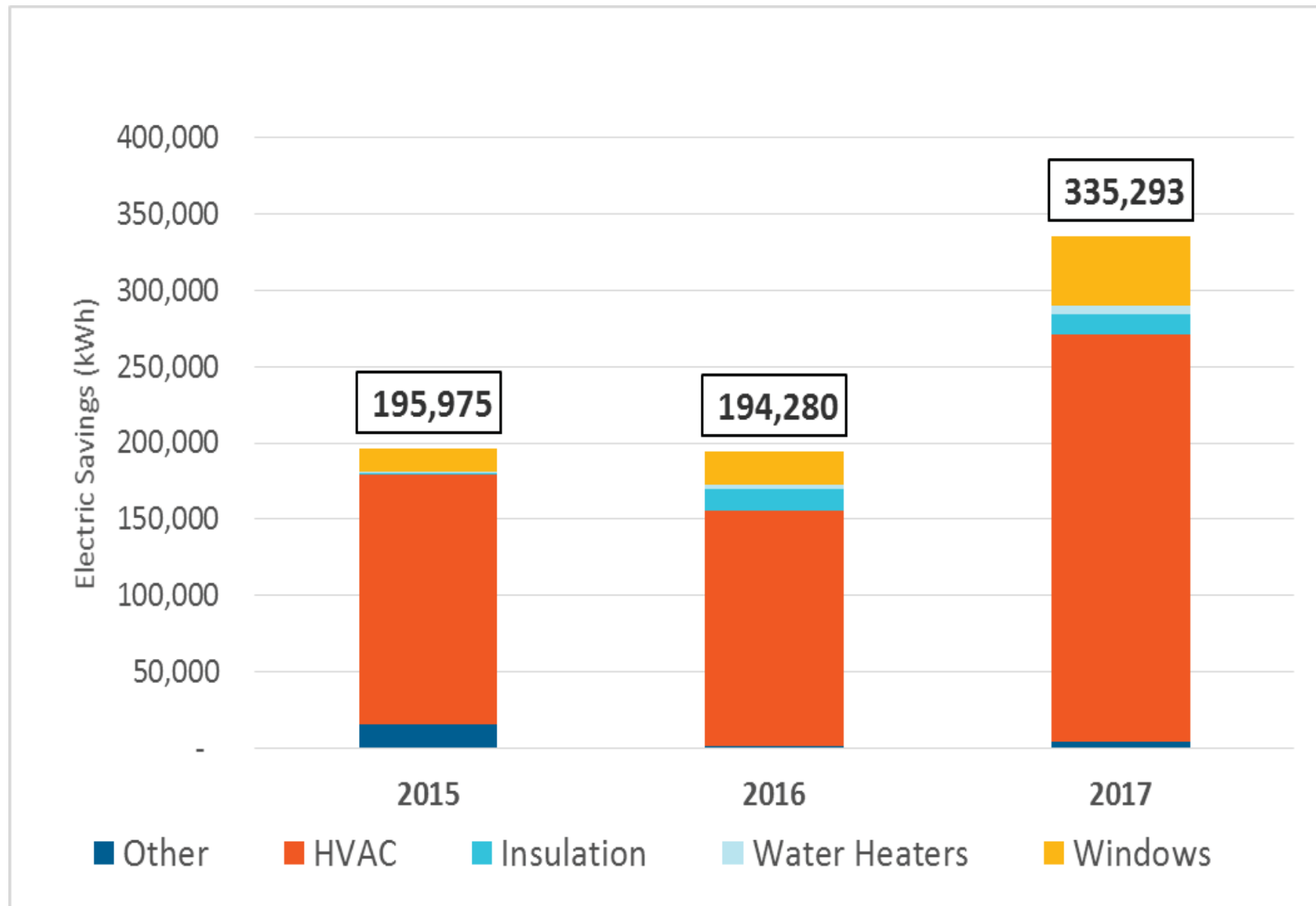
1. Windows
 - \$2,023,350
2. HVAC
 - \$1,637,750
3. Boilers
 - \$512,231

Incentives by Market Sector 2015-2017

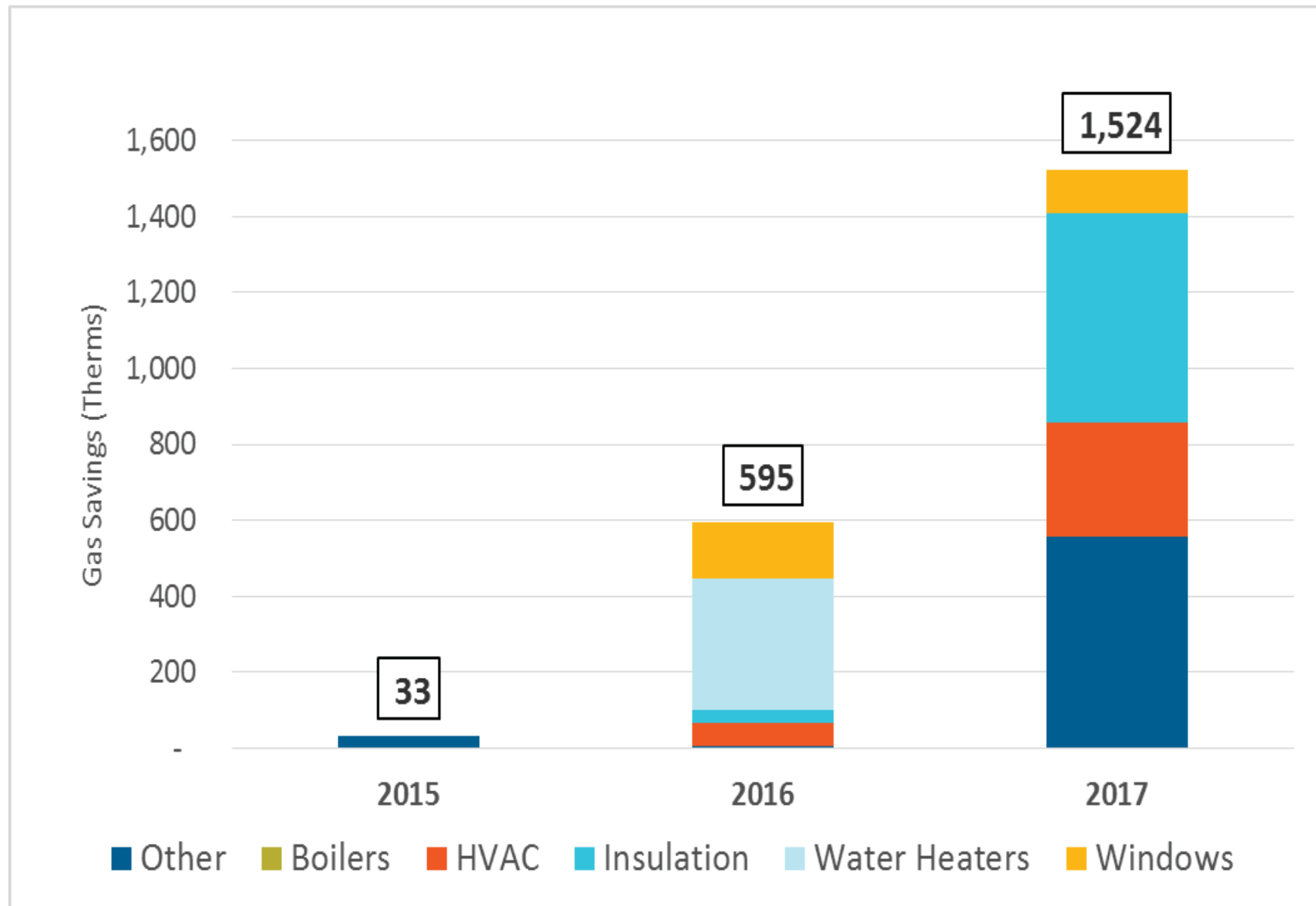


Central Oregon

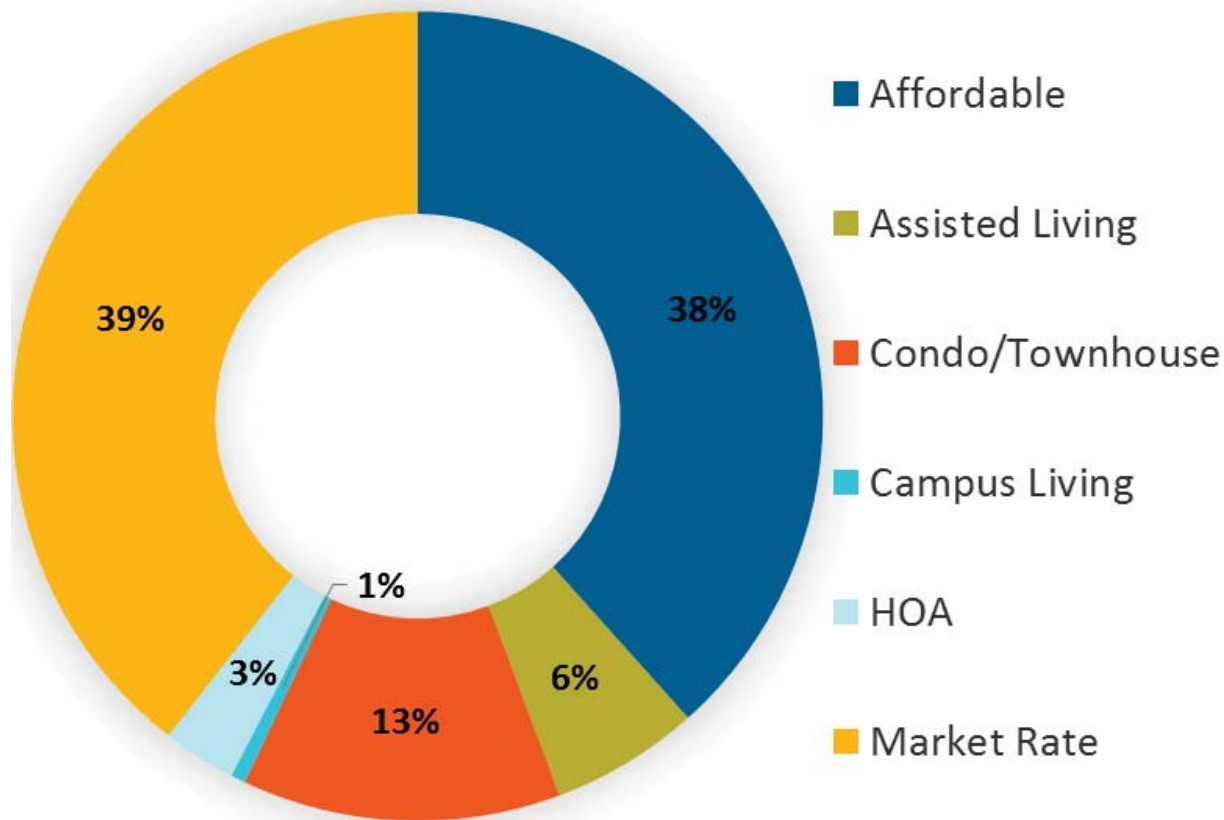
Prescriptive Electric Savings – Central OR



Prescriptive Gas Savings – Central OR



2015-2017 Incentives by sector – Central OR



Top Measures 2015-2017

1. HVAC
 - \$124,019
2. Windows
 - \$47,707
3. Insulation
 - \$18,141

