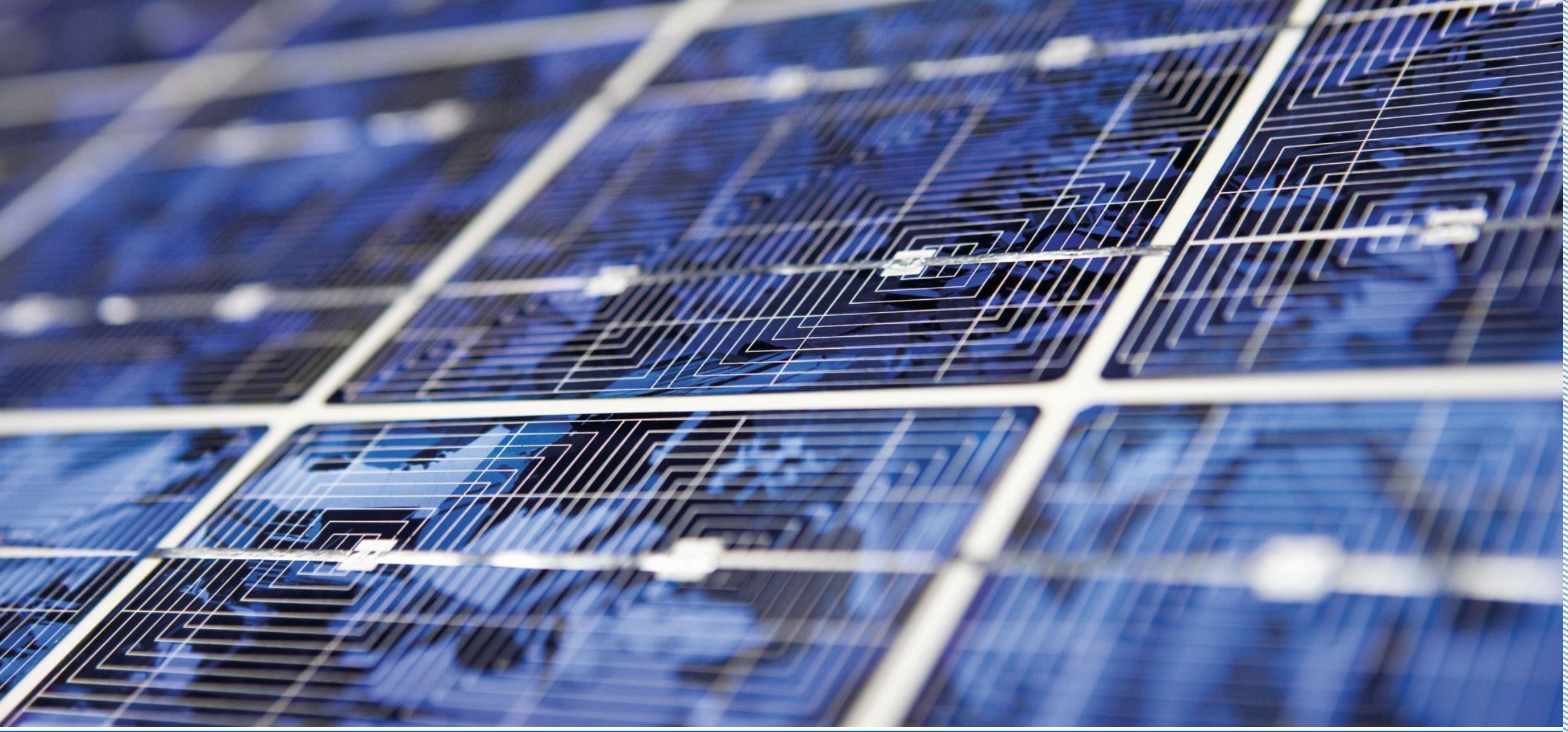


2023 Solar Updates for Trade Allies

Lori Lull, Project Manager – Renewable Energy
Kyle Holmes, Account Manager

Energy Trust of Oregon

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)*

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)*

Energy Assurance Company

- Project Design Review and Verification
- Trade Ally Support Services

Tradeallysupport@energyassurancecompany.com

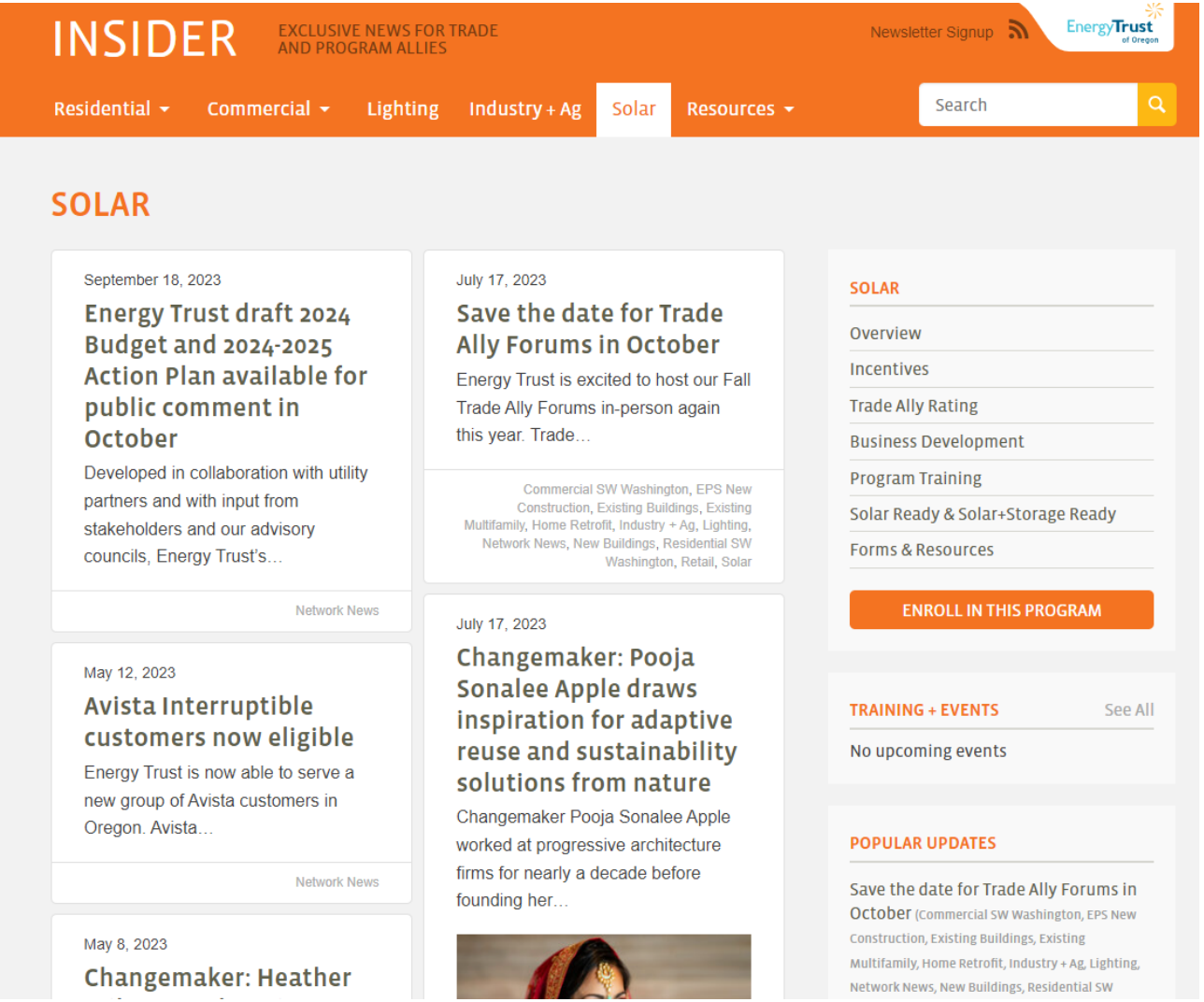
Recent Transitions

- **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



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 (PGE, PAC) 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	Received 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	Received 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

energytrust.org/solarstatus

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.

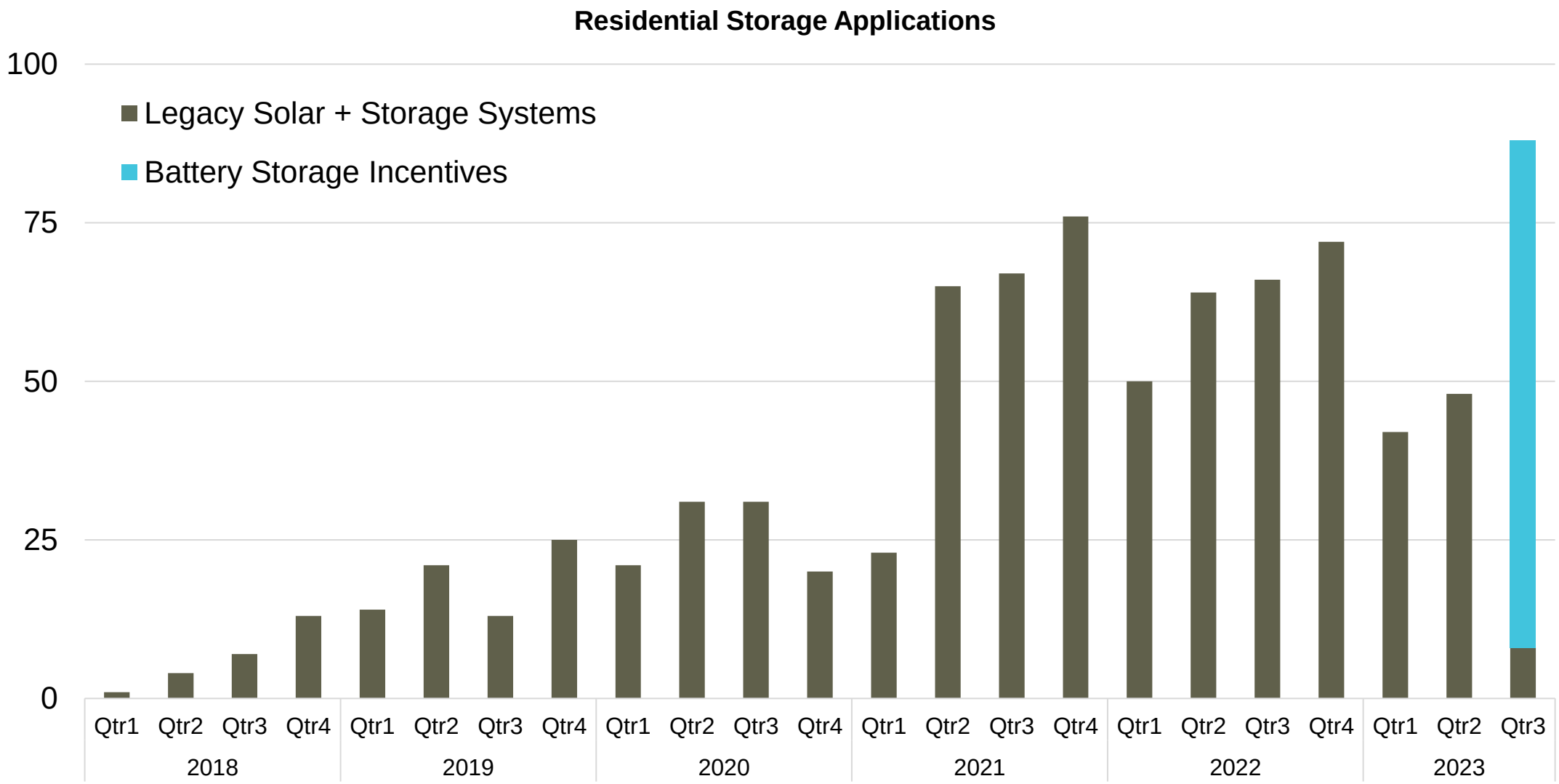
1.3 Must be paired with a new or existing program-qualifying solar installation.

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

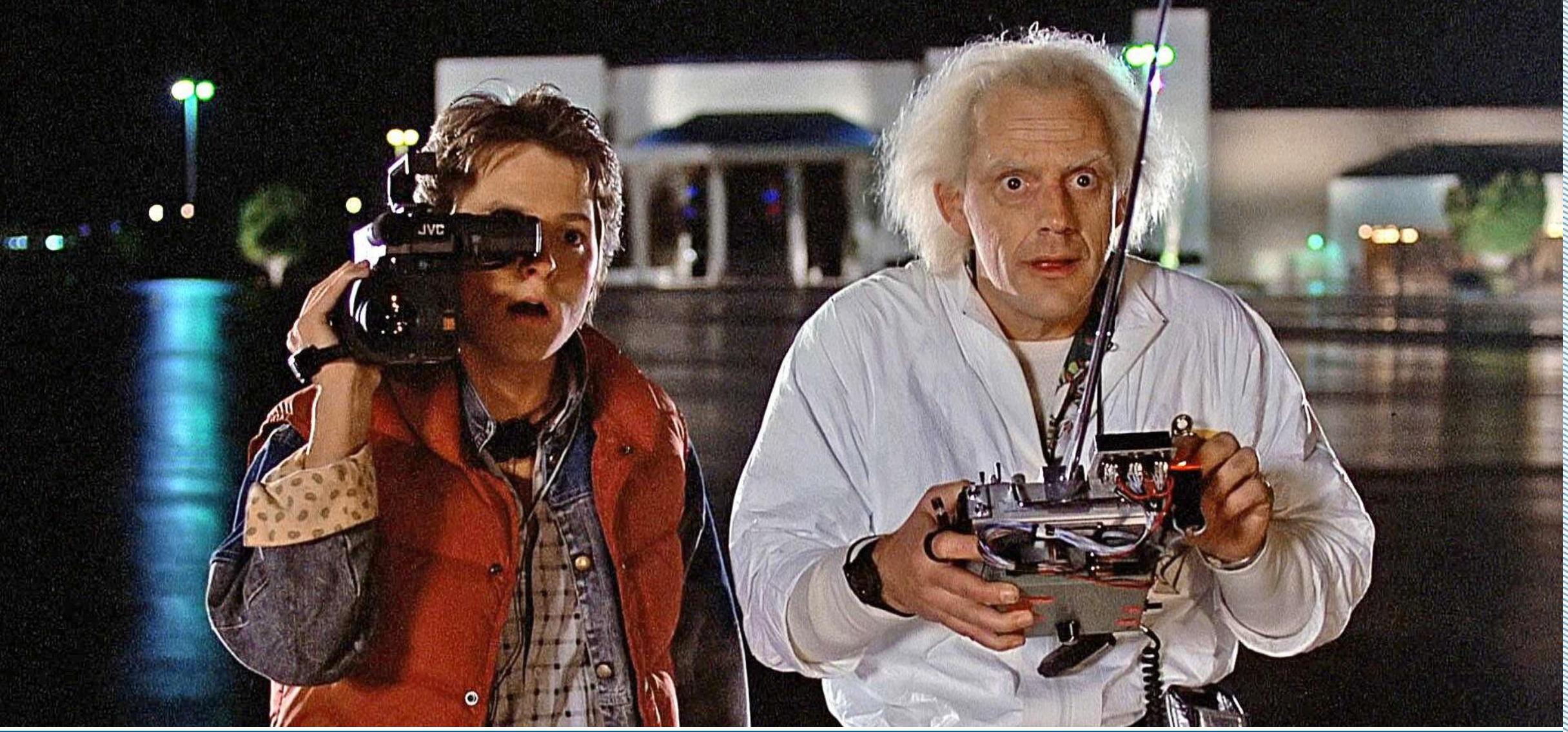
As an active Solar trade ally contractor, you are eligible to receive reimbursement for marketing projects, equipment and training as approved by Energy Trust.

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?

Energy Trust of Oregon

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

EnergyTrust of Oregon

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

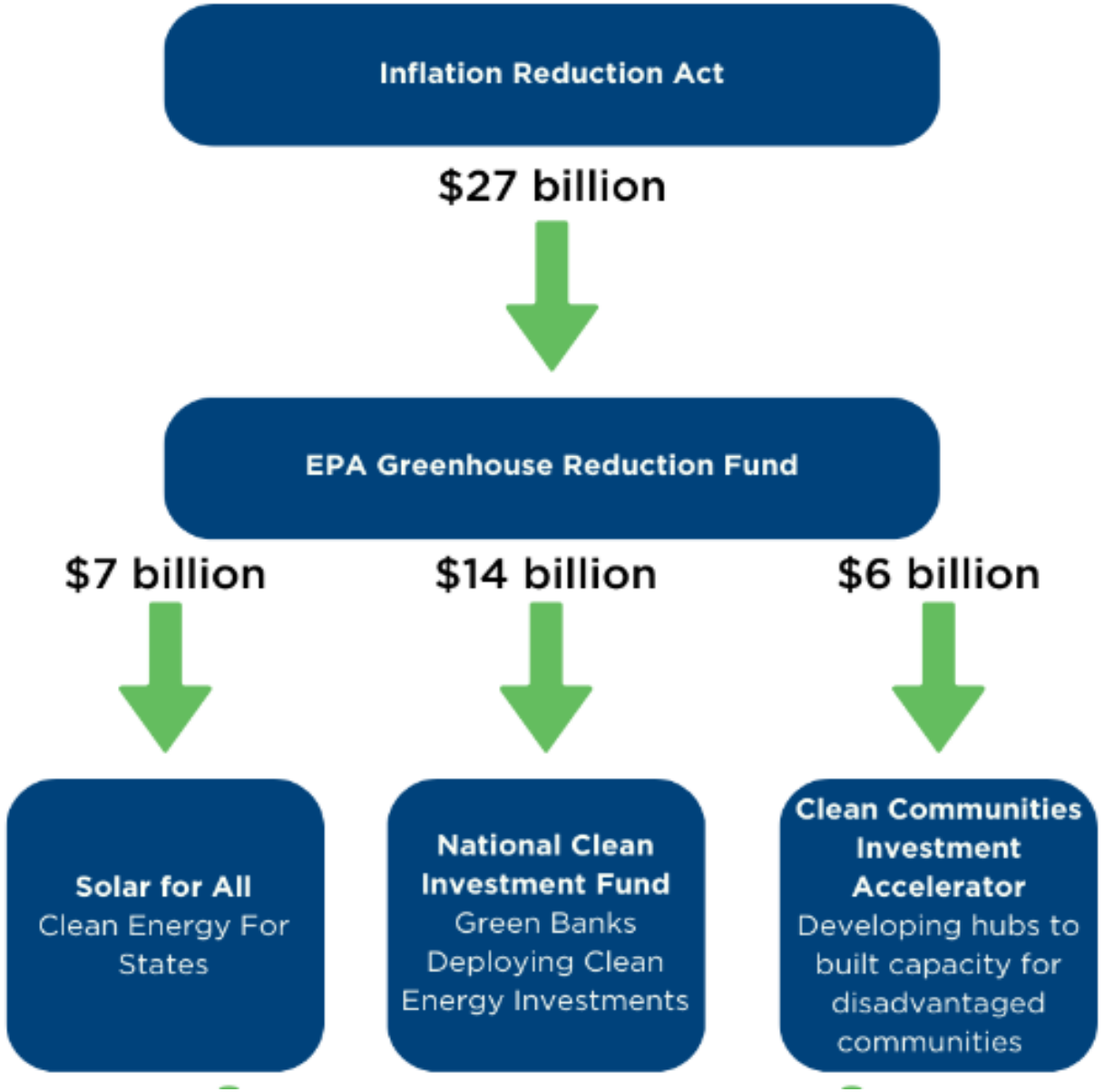
Within our existing budget what can we do?

- 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
$14 billion
$6 billion
Solar for All
Clean Energy For States
National Clean Investment Fund
Green Banks Deploying Clean Energy Investments
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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877.777.4018

kyle.holmes@clearesult.com
503.548.1632

lori.lull@energytrust.org

EnergyTrust of Oregon

Questions?

Feedback?

Feedback Session:

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

OSSIA & ODOE