

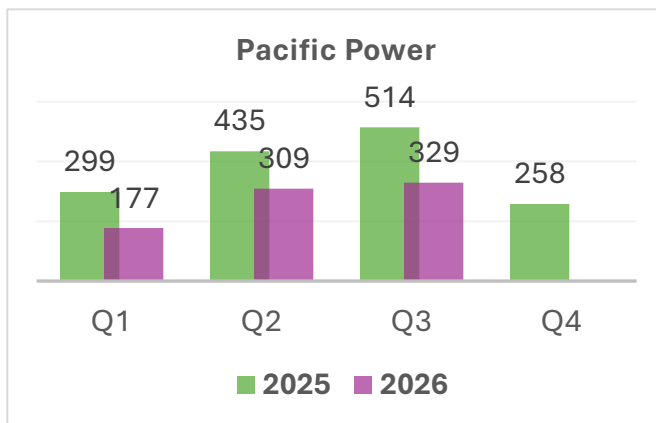
Trade Ally Forum

Session Name: Solar + Storage Program Updates

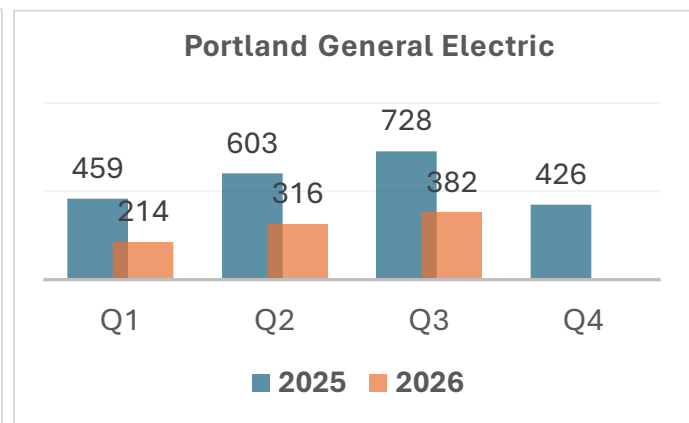
Session Summary:

2026 Review:

When looking at all residential submissions there is a significant decrease in submission volume when compared to last year when the residential federal tax credit was still available. Energy Trust does not incentive third-party owned systems, so these charts don't reflect the full Oregon solar + storage market.



PGE Residential 2026 compared to 2025:
53% decrease in Q1, 48% decrease in Q2,
48% decrease in Q3



PAC Residential 2026 compared to 2025:
41% decrease in Q1, 29% decrease in Q2
36% decrease in Q3

To help support the solar and storage market while we are transitioning away from federal residential tax credits, here are some highlights on where we have been spending some time and resources.

- Increased incentives for residential market rate customers.
- Streamlined incentive reductions
- Innovative solar financing solutions
- Expanded marketing activity
- Stacked incentives with Pacific Power's Wattsmart Program
- Increased Business Development Funds

Income Qualification Changes:

Energy Trust transitioned from using State Median Income (SMI) thresholds to Area Median Income (AMI). **150% AMI became the maximum threshold for moderate income programs on June 1, 2026.** Because AMI is determined on a county-by-county basis, it better incorporates economic variation between regions. Income tables can be found on Energy Trust's website and the Solar + Storage Income Verification Form 210SWR

Solar + Storage Program Guide Updates:

Energy Trust published an updated version of the Program Guide for Solar Trade Allies in July 2026. The updated guide can be found on the Insider Forms and Resources page.

Key updates include:

- Added **Section 1.3.2 Exceptions**, to clarify how to request an exception to program requirements.
- Renamed “Introductory Probationary Period” to “Introductory Period” and changed “Disciplinary Probation” to “Performance Improvement.”
- Expanded **Section 2.3 Consumer Protection and Customer Service Expectations** including not using deceptive language such as “free solar” or “bill swap” if the customer is making a purchase and will still receive a utility bill. The requirement to comply with House Bill 4029 was also added.
- Added **Section 3.4, Solar on New Construction** which includes information on Solar Within Reach for Builders and EPS Solar Incentives for Builders.
- Clarification on SDA and BSDA eligibility in **Section 4.4**.

We encourage all trade allies to review the updated guide in detail and share these changes with relevant staff. As a reminder, trade allies are required to read and understand the program guide and follow applicable portions as a condition of their agreement with Energy Trust.

2027 Development Assistance Update:

Supporting community resilience is a key organizational focus in Energy Trust's Strategic Plan. Basic solar feasibility and resource-assessment work is increasingly part of normal trade ally project development, while some customers need deeper, more customized resilience support. Energy Trust is evolving its business solar strategy to focus resources on the greatest impact for customers, communities, and the grid. To align development assistance with Energy Trust's commercial strategy, the following changes will be made:

- The Solar Development Assistance incentive will be sunsetting at the end of the year. **The last day to submit an SDA application is December 31, 2026.** Battery Storage Development Assistance (BSDA) will remain available in 2027.

- BSDA requirements will be updated to bring more value to customers regarding their site feasibility.
- BSDA submission review process will be updated to do a more thorough review to ensure requirements are met.
- Energy Trust is continuing to develop a future microgrid development assistance.

Solar Consumer Protection - House Bill 4029:

A solar consumer protection bill, House Bill 4029, was passed in Oregon on March 5, 2026 and went into effect on June 5, 2026. The bill clarifies requirements for those selling and installing solar in the state of Oregon.

Included in HB4029 are disclosure requirements and installation contract requirements. On the Insider page under 'Forms & Resources' are checklists trade allies can use. The checklists are for general information purposes only and does not constitute legal advice.

Submit application prior to construction

Energy Trust's Solar and Storage program has identified a trend of trade allies submitting incentive applications after construction has commenced at the site. Initial application and design review are important parts of the incentive application process by identifying eligibility and design issues early. As a result of this trend, the program will be closely scrutinizing funding reservation dates as compared to a project's jurisdictional inspection date.

The Solar and Storage program requires incentive applications to be submitted prior to construction.

Applications submitted post-construction are ineligible for incentives. As a best practice, a project should not commence construction prior to a funding reservation notification being sent to a trade ally and customer via PowerClerk.

