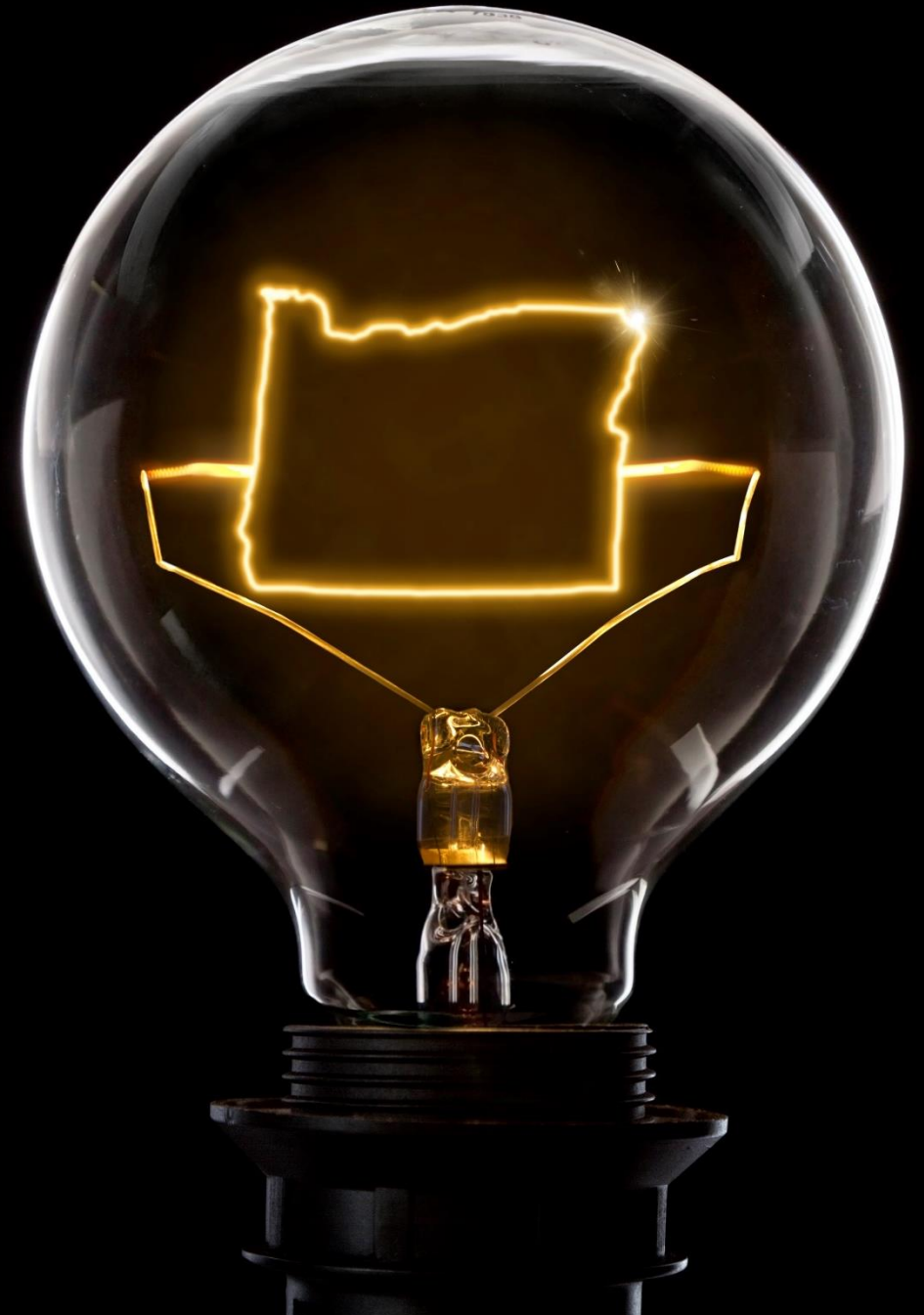




# **Energy Trust Performance Measures (UM 1158) Stakeholder Workshop**

**Benedikt Springer  
February 14, 2024**



# Agenda

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<b>Welcome and Introduction</b>	10:00 – 10:10 am
<b>Equity Metrics</b>	10:10 – 10:30 am
<b>Measuring Market Infrastructure Investments</b>	10:30 – 10:50 am
<b>Measuring Administrative Costs</b>	10:50 – 11:10 am
<b>Open Forum</b>	11:10 – 11:30 am

# Operating Agreements

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- Be energy efficient: Allow room for multiple perspectives. Leave time for everyone
- Stay engaged (connected) without tripping the circuit breaker (don't overheat)
- Consider environmental conditions (mute when not speaking)
- Seek understanding (listen to understand, not to respond)
- Group norms (suggestions from participants)

# Introduction and Background

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- Energy Trust
- Mission
- Performance Measures

## Oregon Public Utility Commission Staff

- Sarah Hall
- Joseph Abraham
- Benedikt Springer

## Energy Trust of Oregon

- Elaine Prause
- Alex Novie
- Chris Dunning
- Cameron Starr

## Utilities and Stakeholders

- Introduce yourself in the chat (name, organization, pronouns)

# Schedule – UM 1158

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- December 2024: [Energy Trust 2024 Budget and 2024 Action Plan](#) adopted
- February 14, 2024: 2024 Performance Measure Workshop
- March 19, 2024: Commission considers 2024 performance measures at public meeting
- May 2024: Energy Trust presents 2023 annual report and performance
- Q3: Energy Trust starts 2025 budget process

# Equity Metric 1: Access to Support for Communities

- Access to Support for Communities: Increased support to nonprofit organizations with a purpose to serve environmental justice communities or to support nonprofit-led initiatives serving environmental justice communities. Increased support can be incentives, training, and funding for energy efficiency upgrades, solar, or solar-with-storage projects.

<b>2023 Performance Measure</b>	<b>Proposed 2024 Performance Measure</b>
Increased support by \$200,000 to \$1.8 million to nonprofit organizations with a purpose to serve environmental justice communities or to support nonprofit-led initiatives serving environmental justice communities.	Spend at least \$4.5 million in support (including incentives) of nonprofit organizations supporting environmental justice communities.  In comparison with 2023, increase the number of participating community-based organizations, the number of projects completed, the amount of savings achieved, and \$ of incentives delivered.



# Equity Metric 2: Access to Information

- Access to Information. Increased funding to support targeted outreach to environmental justice communities, including funding for community ambassadors, education, and workshops.

<b>2023 Performance Measure</b>	<b>Proposed 2024 Performance Measure</b>
10 additional combined FTEs or community ambassadors focused on this effort, a roughly 35 percent increase in people over the 16.5 FTE and 12 community ambassadors in 2022.	Add staff to a total of 35 FTE to support targeted outreach to environmental justice communities.  Describe at least ten examples of how outreach efforts have led to new projects that delivered savings to environmental justice communities.

# Equity Metric 3: Energy Burden Reduction

- Energy Burden Reduction. New and expanded low-cost and no-cost offers to reduce energy burden created and launched.

2023 Performance Measure	Proposed 2024 Performance Measure
10 total offers, a 25 percent increase from the 8 offers available in 2022.	In comparison with 2023, increase the number of community partners and customers receiving no-or low-cost offers.  Report any additional demographic information for customers (e.g. income categories, race/ethnicity) if available.



# Equity Metric 4: Energy Burden Reduction

- Community Resilience. Solar and solar-with-storage system projects supported for low and moderate-income residents in areas with limited infrastructure or high energy burden.

<b>2023 Performance Measure</b>	<b>Proposed 2024 Performance Measure</b>
At least 5 CBOs engaged in creating and evolving the solar plus storage offer.	Increase the number of solar and solar plus storage projects in development or completed for low-and moderate-income customers.  Report total projects and projects (completed and in development) in census tracts that are rural or have above-average energy burden.  Report learnings from program operations and stakeholder feedback. Describe how it will be used to improve the offering

# Market Infrastructure Investments

Topic	Proposed 2024 Performance Measure
Develop and expand the Trade Ally network, \$ 2.6 million	<p>In comparison with 2023, increase the number and diversity (women- and minority-owned businesses) of active trade allies, as well as the number of projects completed and savings.</p> <p>Explain how Energy Trust efforts have helped customers gain access to a broader and more diverse network of qualified contractors.</p>
Workforce development, \$2.0 million	<p>Report activities and spending.</p> <p>Explain how Energy Trust efforts have helped potential trades people gain skills and opportunities; and have increased the availability of qualified workers.</p>

# Market Infrastructure Investments

Topic	Proposed 2024 Performance Measure
Partnerships with community-based organizations, \$4.6 million	See equity metric, support for communities
Community engagement and support, \$3 million	See equity metric, access to information

# Administrative Costs and Staffing

2023 Performance Measure	Proposed 2024 Performance Measure
Administrative and program support costs must be below 8% of annual revenues (no more than \$16,095,768) [waived].	Administrative costs must be at or below 6.5% of expenditures.
Administrative and program support cost growth is limited to 10% year-over-year increase (no more than \$1,529,712) [waived].	Report the year-over-year increase in administrative costs in comparison with the increase in expenditures.
Staffing cost growth is limited to 9% year-over-year increase (no more than \$1,745,639) [waived].	Total staffing costs are limited to 9.5% of expenditures. Report on staffing needs and performance.

# Administrative Costs Comparison

	2022 Actual	2023 Budget	2024 Budget
Administrative Costs (GAPP)	14,083,859 (10,961,677)	17,816,885 (13,506,263)	22,803,607 (17,180,235)
Percent of Revenues	7.0%	8.5%	8.5%
Percent of Expenditures	7.2%	7.9%	7.5%
Percent of Expenditures (GAPP)	6.0%	6.0%	5.6%
Percent Increase	13.0%	26.5%	28.0%
Percent Increase (GAPP)	19.4%	23.2%	27.2%
Expenditure Growth	0.0%	24.0%	35.2%

# Staff Costs Comparison

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	2022 Actual	2023 Budget	2024 Budget
Staffing	16,926,312	20,058,105	25,495,474
Of Expenditures	9.5%	9.1%	8.5%
Increase	10.9%	18.5%	27.1%

# Other Issues for Discussion

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# Schedule – UM 1158

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# Thank you for your participation!

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**Benedikt Springer**  
**[benedikt.springer@puc.oregon.gov](mailto:benedikt.springer@puc.oregon.gov)**





# OPUC Equity Metrics and Market Infrastructure Investments

## 2024 Target Setting for Energy Trust

February 14, 2024



# Energy Trust's 2024 Organizational Goals



Customers will save and generate energy and reduce costs in 2024 and beyond as a result of investments in clean energy programs, including those designed to meet the needs of customers the organization has historically underserved.



Customers will gain access to a broader and more diverse network of qualified contractors who can install clean energy upgrades in their communities, and potential trades people will gain skills and opportunities in the energy efficiency and solar industries.



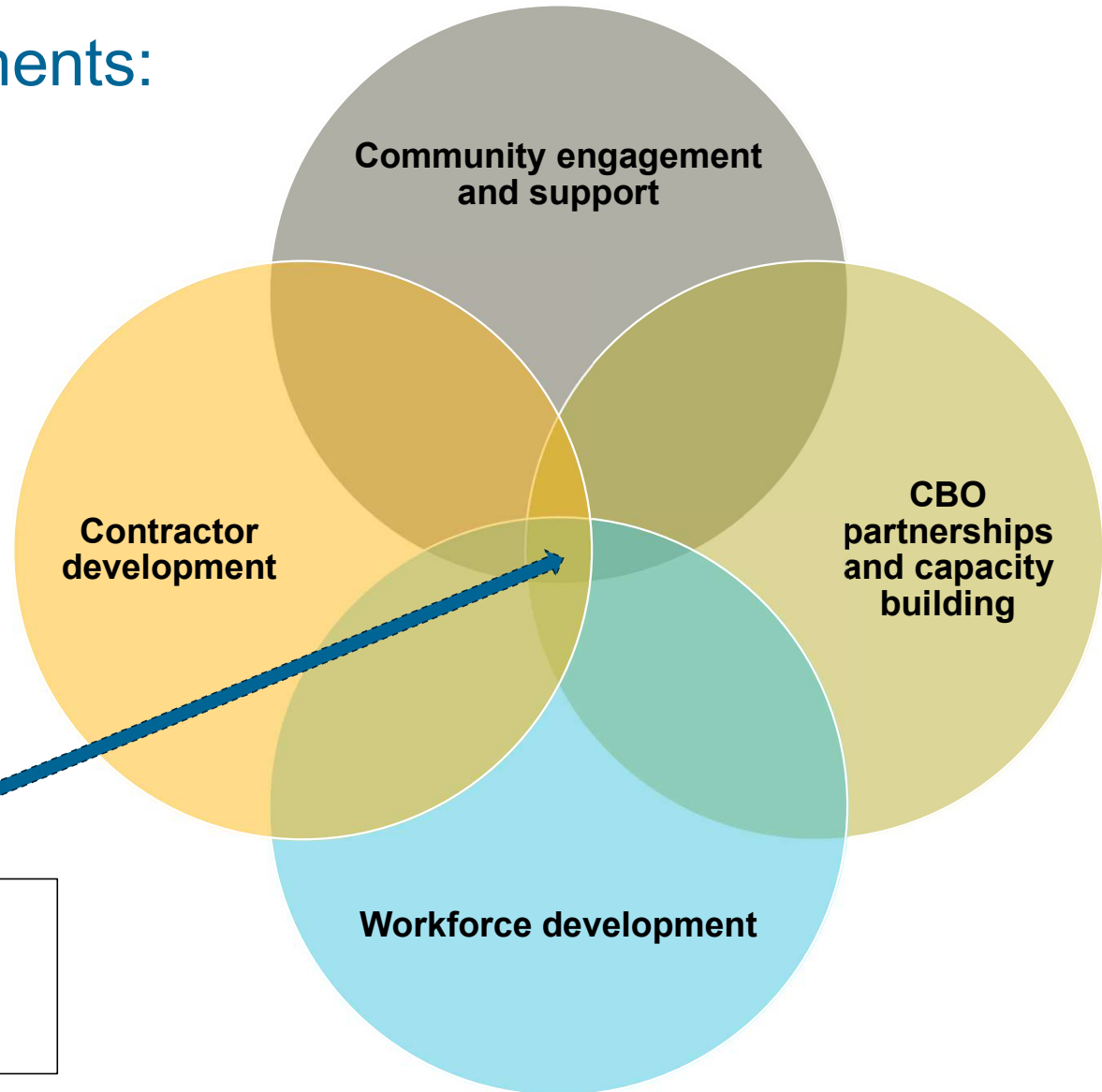
Community-based organizations will have opportunities to bring clean energy benefits to their communities by partnering with Energy Trust to deliver programs and accessing funding, training, mentorship and connections.



Customers, partners and stakeholders will benefit from Energy Trust's ability to achieve long-term goals by shifting to a multiyear budgeting and planning process for future years.



# Infrastructure investments: Key focus areas

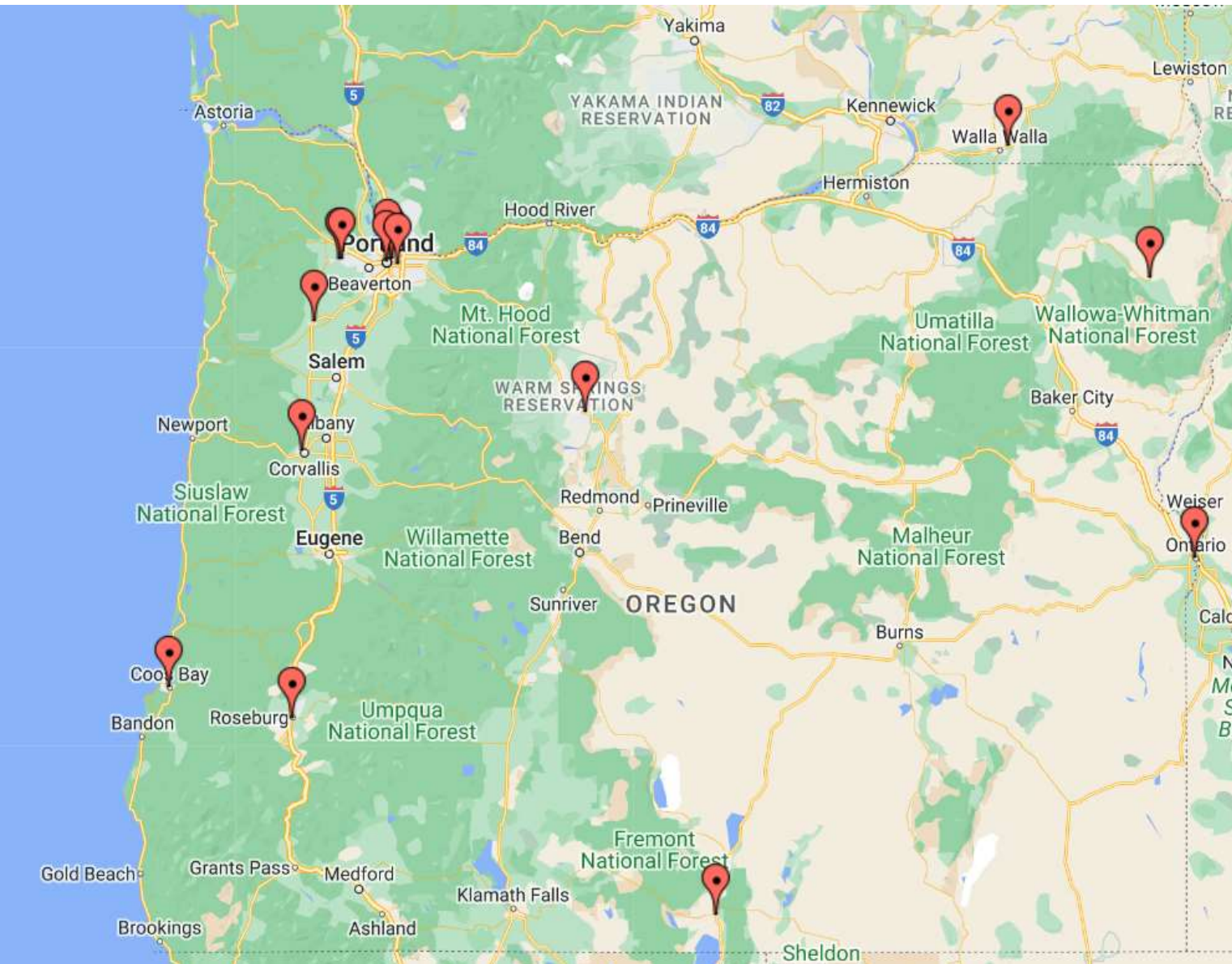




*Serving more residents, businesses, and communities with clean energy services through multiple market and delivery channels*



## Infrastructure Investments: Key Focus Areas

	OPUC Performance Measure Category	
<i>Key Focus Area for Energy Trust</i>	<i>Equity Metrics</i>	<i>Market Infrastructure Investments</i>
CBO partnerships + capacity building	✓	
Community engagement & support	✓	
Contractor development		✓
Workforce development		✓



Community Partner	2022 Project Activity
<p data-bbox="1556 375 1787 418">Warm Springs Housing Authority</p> 	<p data-bbox="1835 375 2053 505">Seven HEAs and four whole-home insulation treatments from Warm Springs Housing Authority</p>
<p data-bbox="1556 578 1619 597">AAAH</p> 	<p data-bbox="1835 586 2053 683">70 Home Energy Assessments and 12 insulation projects from AAAH</p>
<p data-bbox="1556 781 1745 829">Community Energy Project (CEP)</p> 	<p data-bbox="1835 789 2053 911">107 Home Energy Assessments, 38 HWHs and 10 insulation projects from CEP</p>
<p data-bbox="1556 951 1696 976">EUVALCREE</p> 	<p data-bbox="1835 959 2053 1008">38 HEAs and 13 DHPs from EUVALCREE</p>
<p data-bbox="1556 1122 1787 1162">Lake County Resources Initiative (LCRI)</p> 	<p data-bbox="1835 1130 2053 1219">29 HEAs and three DHPs, windows, and insulation projects from LCRI</p>

## Program delivery through community partners

Year	2019	2020	2021	2022	2023*
Projects	40	132	220	295	340
Therm Savings	-	105	2,508	1,587	1,253
kWh Savings	109,503	401,325	544,033	819,937	1,305,485
Incentives	\$90,999	\$351,745	\$538,868	\$1,145,123	\$2,059,519
Enrolled Partners	5	9	12	16	24

*\*Energy Trust is still closing out the 2023 program year*



## OPUC Equity Metrics for Energy Trust

Key focus areas of Energy Trust's "infrastructure investment"

- *CBO partnerships + capacity building*
- *Community engagement & support*

These started with Metrics approved by OPUC Commissioners in December 2022 and initial annual targets in 2023. This is OPUC's oversight of Energy Trust, and their language:

1. Increased support to environmental justice through nonprofits
2. Outreach and access to information for EJ communities
3. No- and low-cost offers to reduce energy burden
4. Community resilience (residential solar + storage)



## Measuring Market Infrastructure Investments – Develop and Expand Trade Ally Network

- Energy Trust has intentionally worked to expand minority- and women-owned contractor representation in our network since 2018 with a focus on enrollment and project counts
  - 2018
    - 18 MBE
    - 11 WBE
  - 2023
    - 41 MBE
    - 55 WBE
- Capacity building is primary focus – helping new and existing trade allies complete energy efficiency projects
- Contractor Development Pathway (CDP)
  - Provides workshops on available incentives, how to submit incentive applications, the utility landscape and how to work with our energy advisors
  - Access to Small Business Trade Ally Resource Network
  - Access to Business Development Funds
  - Mentorship with an experienced trade ally
  - Continuously evolving to meet the needs of contractors based on participant feedback
- 2024 and onward
  - Launching residential CDP offering
  - Expanding technical training
  - Expanding access to Small Business Trade Ally Resource Network
  - Streamlining Trade Ally enrollment procedures and network support structure



CDP cohort attends Burch Energy's Advanced Rooftop Controls training in 2022.

2023 CDP Cohort Participants  
Graduation Ceremony



CERTIFICATE OF COMPLETION  
COMFORT INSULATION SPECIALISTS LLC  
Contractor Development Pathway 2023

CERTIFICATE OF COMPLETION  
MFS HEATING & COOLING LLC  
Contractor Development Pathway 2023

CERTIFICATE OF COMPLETION  
GDC LLC  
Contractor Development Pathway 2023

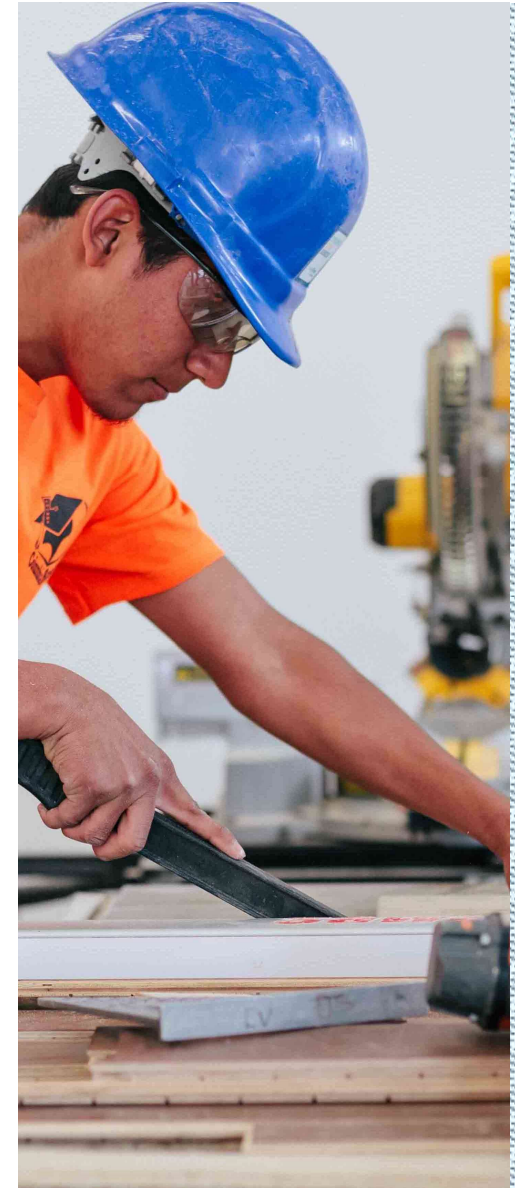
CERTIFICATE OF COMPLETION  
PEAK ELECTRICAL SERVICES LLC  
Contractor Development Pathway 2023

CERTIFICATE OF COMPLETION  
ABM GENERAL CONSTRUCTION LLC  
Contractor Development Pathway 2023



# Measuring Market Infrastructure Investments – Workforce Development

- Trades workforce development
  - Skilled workforce is needed to acquire energy savings and develop small scale renewable solar
  - Lack of contractor access is a barrier for customers and community organizations
- Ongoing development of strategy informed by workforce organizations and communities
  - Goal is to align efforts, identify gaps and coverage needs and support worker pipelines
  - Looking to work with communities to support and scale existing efforts when possible





Thank you!

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