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December 30, 2016

Public Utility Commission of Oregon
201 High Street SE, Suite 100
Post Office Box 1088
Salem, Oregon 97308-1088

Attn: Filing Center

RE: **RG-13** - Oregon Low-Income Energy Efficiency Program (OLIEE)
Annual Report (Program Year 2015-2016)

Northwest Natural Gas Company, dba NW Natural ("NW Natural" or the "Company"), submits herewith its Oregon Low-Income Energy Efficiency Program (OLIEE) Annual Report for the Program Year 2015-2016 in accordance with the Company's Tariff P.U.C. Or. 25, Schedule 320.

Please do not hesitate to contact me should you have any questions about this report.

Sincerely,

/s/ Gail Hammer

Gail Hammer
Rates and Regulatory Affairs

enclosure

NW Natural

Oregon Low Income Energy Efficiency Program
Annual Report To the Public Utility Commission of Oregon
Program Year: October 2015- September 2016

I. OLIEE: Community Action Program (CAP) Overview:

Since October 2002, NW Natural (NWN) has collected public purpose funding for its Oregon Low-Income Energy Efficiency program (OLIEE). This collection is equal to one quarter of one percent (0.25%) of gross revenues received from Oregon’s residential and commercial customers.

The OLIEE program assists NWN’s low income customers by reducing their natural gas needs through the installation of high efficient gas equipment and weatherization. The program is applicable to owners and renters of single or multi-family dwellings, who meet income guidelines as established in Oregon’s annual Low Income Home Energy Assistance Program (LIHEAP) State Plan¹, and is administered by local community action agencies (agencies). On average, the OLIEE program reduces participating customers’ gas usage by approximately 20%² annually.

II. Matching Funds:

Historically, OLIEE has been reliant on matching funds derived from the Office of Community Services’ Low Income Home Energy Assistance Program (LIHEAP) and the US Department of Energy’s Weatherization Assistance Program (WAP). Unfortunately, while matching funds only covered 10-14% of weatherization costs over the last three years, those matching funds contain restrictions that deprioritize natural gas heated homes. Consequently, program completions have been chronically below utility expectations. To address this, the OLIEE tariff was adjusted during the 2015-16 program year to disentangle the utility program from the federal funding. As outlined in the prior annual report, the following adjustments were made:

Expense category	Prior	Current
Weatherization cap per home	\$5,000	\$10,000
Audit and Inspection allotment	--	\$850
Health, Safety and Repairs	\$440	\$1,000
Agency Administrative expense	\$225	\$750
Max reimbursement per home	\$5,665	\$12,600

During the 2015-16 program year, matching funds were only required in 5% of projects and represented only 2% of the total weatherization expenses.

¹ The 2016 Oregon LIHEAP Fact Sheet is found here:
<http://www.oregon.gov/ohcs/pdfs/factsheets/factsheet-low-income-home-energy-assistance.pdf>

² According to 2011 Impact Evaluation performed by Forefront Economics

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III. Current year weatherization results:

Table 1 – Prior three program years' results

	<u>2015-2016</u>	<u>2014-2015</u>	<u>2013-2014</u>
Homes weatherized (Target)	238 to 351	208 to 334	253 to 358
Homes weatherized (Actual)	231	198	201
Total Weatherization (Wx) Costs	\$1,269,561	\$ 919,054	\$ 739,948
Reimbursed Measure Costs	\$1,246,030	\$ 791,611	\$ 664,069
Reimbursed HSR	\$193,184	\$ 85,928	\$ 80,537
Est. therms	52,817	45,876	46,756
Est. therms saved per home ³	229	232	233
Wx cost per est. therm saved	\$24.04	\$20.03	\$15.83
Wx reimb per est. therm saved	\$23.59	\$17.26	\$14.20

Homes/targets: The new tariff went into effect March 1, 2016 and with only seven months of the program year, agencies completed 17% more homes than the prior year. Changes of this magnitude require lead time to increase capacity beyond the margins. With stable, simplified funding, agencies have been identifying production constraints and hiring strategic personnel to help increase capacity. Therefore completions are expected to continue increasing over the next several program years as evidenced by agency goals outlined in Section IV below.

Therms/Costs: As anticipated, total reimbursed weatherization costs increased in 2015-16 but so also did the reimbursed cost *per therm*. NWN attributes this to more furnace installations which increased 60% from the year prior (from 59 replacements in 2013-14 to 83 in 2014-15 to 133 in the current year) but year over year furnace savings only increased 15%. OLIEE allows furnace replacements in “no-heat” (inoperable HVAC) situations, regardless of savings-to-investment calculation. Furnaces are often replaced and upgraded without indication of therm savings. This understates the energy value of furnace replacements and overstates the price per therm. The Company will be making adjustments in the 2016-17 program year to capture savings associated with “no-heat” furnace replacements; NWN expects the per therm cost to decrease in subsequent years.

IV. 2016-2017 Future look including targets and wait lists

In addition to 2016-17 targets, Table 2 provides actual results for program year 2015-16, waiting list information as of program year-end 2015-16 and total meter count by agency geography as requested by the Commission.

³ Estimated therms saved as calculated by the Oregon Department of Energy (ODOE) -approved modeling software, RemRate.

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Table 2: Results, Projections and Wait List Data⁴

CAP Agency	Counties Served	PY 2016-17 Targets		PY 2015-16 Actuals	Gas ⁵ home wait list 9/30/15	As of 9/30/16		Residential Meter Count
		Low	High			Gas home wait list	Total Wait list	
Clackamas County CA	Clackamas	25	35	26	61	79	214	83,756
Community Action Organization	Washington	75	120	51	105	75	264	128,085
Community Action Team, Inc.	Columbia and Clatsop	10	12	3	65	63	264	18,971
Community Services Consortium	Benton, Linn and Lincoln	45	60	19	118	98	476	47,723
Housing & Comm Svcs of Lane Co	Lane	35	50	18	62	41	457	35,108
Mid-Willamette Valley CA	Polk and Marion	60	100	43	295	136	476	72,453
Weatherization & Energy Services	Multnomah	110	124	66	134	34	150	181,409
Yamhill Co CA Partnership	Yamhill	8	10	5	0	7	288	10,764
Oregon Coast Comm Action	Coos	10	20	0	N/A	N/A	N/A	1,342
All Agencies		378	531	231	840	533	2,589	579,611

In addition to a 17% increase in completions over the last program year, NWN is also pleased to see a 37% drop the number of gas homes on the waiting list. The agencies have confirmed the new program design enables them to prioritize gas homes and move customers through the system more quickly.

Projects averaged approximately \$8,000 during the 2015-16 program year. Applying this figure to the anticipated 2016-17 targets will require \$3.0-\$4.2M. Collections for 2016-17 are anticipated to be \$1.3M in addition to the nearly \$3M account balance. The Company will be monitoring balances monthly and the OLIEE Advisory Committee will be monitoring them quarterly. It is possible an increase in public purpose funding will be requested during the upcoming program year to meet the demands of this successful program.

⁴ The waiting list information presented in this table is as reported to NW Natural by each agency.

⁵ As reported in prior annual report; due to timing, figures may not tie exactly to energy ed reports

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V. Program Funding: Cash basis⁶

Table 3 – 2015-2016 OLIEE Program Year Funding

Program Revenue:	
Public Purpose Funding	\$ 1,313,622
Interest and Investment Income	\$ 6,204
Total PY 2015-16 Program Revenue	\$ 1,319,825
Expenses:	
Total Agency Cost ⁷	\$ (1,345,928)
Open Solicitation Program (OSP)	\$ (94,170)
NWN Administration	\$ (65,794)
Energy Education	\$ (149,749)
Total PY 2015-16 Expense	\$ (1,655,641)
PY 2015-16 Excess Funding	\$ (335,816)

VI. Energy Education:

The current tariff allows 10% of program collections to be used for client energy education each program year. The Company's goal is to create synergies in the delivery and funding of traditional low income services - weatherization and bill assistance – while better serving this customer group. By targeting customers on the weatherization waiting lists (OLIEE) and previous recipients of bill assistance (OLGA⁸), NWN specifically hopes to:

- Provide more immediate attention and services to customers on weatherization wait lists
- Provide education and direct install measures to customers whose homes do not qualify for OLIEE
- Show OLGA customers how to use less gas and decrease their dependency on bill payment assistance.

Agency-specific reports are included in Appendix 1. Each includes an overview of their offering and greater detail on:

- Wait list management
- Education methods
- Program Impacts, and
- Accounting

⁶ Note: expenses are paid 1 to 2 months after being incurred. Due to this timing difference, figures in section III and V will not fully synchronize.

⁷ Agency costs include measure reimbursement, health, safety and repair allowance as well as administrative costs.

⁸ Oregon Low Income Gas Assistance

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NW Natural is pleased with the agency efforts and seeks to foster inter-agency collaboration to help create an even stronger education program. In addition to providing reports outlined above, agencies have supplied PowerPoints and other teaching materials and testimonials that NWN is making available to the Community Action network.

VII. OLIEE: Open Solicitation Program (OSP) Overview:

Since program inception, OLIEE has generally collected more funds than were spent each year; naturally this trend created an increasing account balance. To better steward these backlogged funds, the Company partnered with organizations serving a similar demographic as the CAP and identified projects that meet the spirit of the OLIEE program while providing some diversification of housing stock and, hence, tenant profiles. These projects all fall within the scope of the Open Solicitation Program of the OLIEE tariff.

Partners/ Projects:

- Community Energy Project (CEP) > DIY Air sealing training and kits
- Enhabit > Anti-displacement driven efficiency upgrades
- Portland Community Reinvestment Inc. and Verde > Adding energy efficiency upgrades in homes that would otherwise only receive general repairs
- Home Forward > Furnace and possible window replacement in historic building

Contracts have been executed between NWN and all four organizations listed above, however work has only been completed and invoices paid to CEP and Enhabit. Reports for each of these are contained in Appendix 2. Work completed thus far is achieving our goals.

NWN is hopeful that exploring additional pathways to channel monies collected for low income customers will create stronger program efficacy and serve people that have never been reached. Diversification in the program is expected to provide greater strength to each of the individual components and will enable continued learning and refining this offering. NWN is on track for our goal to have the backlog funds deployed by September 30, 2017.

VIII. Program Oversight

To help ensure optimization of program design and execution, the OLIEE Advisory Committee (OAC) meets semi-annually to provide deliberation and counsel to NWN. Members include agency representatives (2), the Citizens Utility Board (CUB), the Public Utility Commission (PUC) and the Community Action Partnership of Oregon (CAPO). The intent of this body is to increase accountability for program performance through the observation of early indicators and greater visibility of upstream statistics (upstream of home completions), and through impact evaluations, when deemed appropriate and necessary.

NWN appreciates the insight and dedication of this body; we are positioned for a very strong 2016-17 program year.

**Community Action Organization – Washington Co
NW Natural Energy Education
Program Year 2015-16 Reporting**

1. Overview:

Community Action Weatherization Services provides energy education as part of its comprehensive weatherization program. Energy education is initially delivered by the Energy Educator at an in-home visit lasting 1½ - 2½ hours. The Educator discusses topics specific to that home such as heating and cooling, hot water, lighting, refrigerators, mold and moisture, and health and safety. The Educator also installs items such as energy-efficient light bulbs, faucet aerators, wall plate thermometers, smoke and carbon monoxide alarms. The client receives printed materials including a Home Energy Manual which Community Action updates and prints. Auditor/inspectors reinforce and add to the energy education with the homeowners during the comprehensive energy audit and inspections. Contractors also add to it while installing measures. Our staff is able to deliver energy education in either English or Spanish. When needed for other languages, we use contract interpreters.

Community Action provided energy education at 32 workshops with 510 attendees, presented at sites throughout the county. Clients sign up through Community Action's Energy Assistance, Head Start or Family Development program. We occasionally present workshops at low-income housing sites, senior centers, etc. The workshop is approximately 1½ hours long, but can last longer when there are a lot of questions. The Educator discusses energy saving topics such as heating and cooling, hot water, lighting, refrigerators, and also health and safety topics such as mold and moisture, combustion safety, and ASHRAE 62.2. Workshop attendees receive a kit of energy-saving items such as energy-efficient light bulbs, faucet aerators wall plate thermometers and our Home Energy Manual. Our energy educators present workshops in either English or Spanish. We have used interpreters to present in other languages.

2. Waitlist management:

October 1, 2015 we had about 350 total households on the waiting list and 125 of them were gas heated homes. On September 30th, 2016 we had about 264 total households on the waiting list and 75 of them were gas heated homes.

Today's (December 1) waitlist of 91 applicants is shorter than last year's, the length of time on the wait list to receive services is shorter and there are no longer any "no heats" on the wait list. With the redesigned OLIEE Program, Community Action continues to ramp up production with a realistic goal of virtually eliminating our wait list by the end of 2018.

3. Education methods:

Community Action presented thirty-two workshops this year. About half are presented in English and half in Spanish. Workshops are presented at our agency, libraries or at community centers. The workshops last about 1½ hours, but can last longer if there are a lot of questions. 15-20 households attend each workshop for a total of 510. Approximately 20% of the attendees are NWN customers. Clients hear about the workshops through our Energy Assistance, Family Development or Head Start

**Community Action Organization – Washington Co
NW Natural Energy Education
Program Year 2015-16 Reporting**

programs. Occasionally there is a workshop at a low-income housing site or other site and in those cases, people hear about it from staff at that site.

Community Action performed 228 home visits during the program year 2015-2016 of which 51 were gas heated homes. Fourteen homes were energy education visits only, with two of them being gas heated homes. 184 home visits were a component of the weatherization work with 19 of them being gas heated homes.

As funds are available, priority is given to households with elderly persons (60 years of age or more), disabled persons, families with children six years of age or younger, high residential energy users, households with a high energy burden and veterans. Priorities are identified through a point system. Community Action maintains a waiting list and awards one additional point for each year a household remains on the waiting list. Community Action may award additional points for homes with inoperable or hazardous heating systems and when partnering on special projects which present leveraging opportunities.

In-home education visits are a component of the weatherization work.

Community Action provides energy education at community outreach events. Community Action also prepares energy educational materials for our Energy Assistance to hand out at client's appointments and mail out to homebound clients. Information and links are available on our website and our Facebook page.

4. Program Impacts:

The NW Natural Energy Education funds have provided materials and helped NW Natural customers better understand how their homes work to make their homes more energy efficient, healthier, safer and more durable. The funds helped reduce the number of NW Natural clients on the wait list, reduced the number of account arrearages and shut offs.

In 2015-16, Community Action distributed 510 kits to households attending energy education workshops. Households received some energy education and Baseload materials during home visits, but not full kits. Kits include the following items:

- 9 watt LED
- 18 watt CFL
- 23 watt CFL
- LED night light
- switch & outlet gaskets
- wall plate thermometer with relative humidity
- rope caulk
- refrigerator thermometer
- aerator bathroom
- shower timer
- teflon tape
- hot water thermometer

At least nine gas furnaces were inspected and either tuned up or had minor repairs performed. Other furnaces inspected, but needing replacements were referred to the OLIEE program.

**Community Action Organization – Washington Co
NW Natural Energy Education
Program Year 2015-16 Reporting**

5. Program Funding/Accounting:

Community Action received and spent \$22,791.00 from NW Natural for Energy Education.

Breakdown of expenditures (in high level terms): Salaries \$1,798.56, benefits and taxes \$651.45, materials and supplies for kits and workshops \$13,446.30, furnace tune ups and repairs \$4,098.33, printing energy education materials and handouts \$1,445.24, and administration costs \$1,351.12.

Community Action received 9.4% of its education funding from NW Natural.

**Community Action Team – Clatsop and Columbia Counties
NW Natural Energy Education
Program Year 2015-16 Reporting**

1. **Overview:** Group classes offered for WX Energy Education clients. If the client is disabled or has another barrier to attending we provide an in-home Energy Education session. Clients receive education on WX, Health and Safety issues in the home as well as Energy Education. Clients are given an energy saving kit when they attend, some items included are CFLs, Refrigerator Thermometer, Nightlight, Sink Aerators, Outlet and Switch Plate Gaskets, etc. Families that are also experiencing difficulty paying their utility bills receive energy education as a requirement of bill pay assistance.

2. **Waitlist management:**
 - Number of total households on your waitlist beginning and end of program year
264 on prescreen list
 - Of that total, how many are heated with natural gas?
63 Gas clients on prescreen list.

3. **Education methods:**
 - Workshops:
 - **Number of workshops conducted:** 32 group sessions
 - **Locations:** Tillamook PUD, Help Hands Homeless Shelter, Astoria CAT Office, Astoria City Hall, St Helens CAT Office
 - **Duration:** 1.5-2 hours
 - **Number of people/households attending workshops:** 110 total attended and 33 of those were clients living in gas homes.
 - **How did participants learn of the workshops:** Local utility partners, through the family resource center, direct outreach and through direct and indirect referrals from CAT's Community partners.

 - In-home Education visits:
 - **Number of homes visited:** 8 in home sessions- They were current or future WX clients or requested directly. Auditor also provides education at time of final inspection.
 - **How were these homes selected:** These clients asked for home sessions due to disabilities or transportation barriers.

 - Other methods: Group energy education and in home energy education provided by CAT's Energy Educator. Client also receives education from auditor at time of final inspection.

4. **Program Impacts:** Clients that are waiting for Wx services are provided education while they are waiting for Wx services. This enables them to take control and make adjustments in how they heat and live in their home to make it more comfortable and affordable until their home is

**Community Action Team – Clatsop and Columbia Counties
NW Natural Energy Education
Program Year 2015-16 Reporting**

weatherized. Clients after education have a better understanding of their utility bills, the safety of their home, and how their choices affect their energy usage.

- 110 energy kits were distributed 33 were given to NWN clients.
- At this time we are not able to inspect and diagnose furnace issues at time of energy ed. We do however send a technician if client reports serious issues with furnace and at time of the audit we complete inspect and test out furnace.
- Narrative: give examples of the participant feedback, or share a success story or two, or highlight a few education successes
Mr. X had been ill for some time so the energy educator went to his home for energy ed. Mr. X suffers from COPD. At some point in the past, a poorly vented gas water heater had been installed. When the furnace came on it sucked the Carbon Monoxide out of the water heater flue and it was distributed throughout the house by means of the furnace located next to the water heater. We were able to address this life threatening emergency and he is now warm, safe and grateful to NWN and CAT. He reports that he feels much better. He also had a hole in the roof that we were able to fix using staff and some revolved rebate dollars. In addition he has been empowered and given the knowledge to reduce his energy usage through the energy education that he received.

5. Program Funding/Accounting:

- Amount received from NWN: **\$8,756**
- Of this, the amount spent: **\$8,756**
- Breakdown of expenditures (in high level terms)

Personnel	\$7174
Travel	\$185
E.E Supplies	\$1,050
Operations	\$ 346
	<u> </u>
	\$8,756
- Percent of agency education funding is from NWN: **12%**

**Clackamas County Weatherization
NW Natural Energy Education
Program Year 2015-16 Reporting**

1. **Overview:** Clackamas County delivers energy education as an integral part of the weatherization process. Savings may be had through the physical installation of energy conservation measures such as insulation and air sealing but this must be complemented with the knowledge of how to operate the house as a system in order to maximize the energy savings. Running the house as a system requires a basic understanding of how heat moves in a house as well as how and how much energy is consumed through lights, appliances and other devices. The goal of our energy education program is to provide a basic knowledge so that our customers can make an informed decision on how they choose to live in their home.

2. **Waitlist management:**

- Number of total households on your waitlist beginning (130) and ending (214) of the program year.
- Of that total, how many are heated with natural gas? Beginning, 52. Ending 79.
- Clackamas County hired a new procurement director and the procurement division has slowed things up a bit trying to implement their changes.

3. **Education methods:**

- **Workshops** – locations, counts and attendees:

Location	# of Workshops /trainings	Attendees
Agency	12	74
Apartment Complex	1	10
Senior Center	1	6
Total	14	90
<i>Gas only</i>	<i>4</i>	<i>17</i>

- **Other methods:** In partnership with Oregon State Extension Service, we were brought in to teach energy conservation education as part of the Science curriculum. This program ended this last school year. We are hoping to be brought back by popular demand. We taught 592 students in 8 schools.
- **In-home Education visits:**
 - Through weatherization 35 homes
 - Standalone home visits 87 homes
 - Weatherization are selected from those interested in receiving services, typically first come first serve.
 - Standalone are received from energy assistance program and those who may not receive weatherization services in the short term.

**Clackamas County Weatherization
NW Natural Energy Education
Program Year 2015-16 Reporting**

4. Program Impacts:

- Impact on Wx: Clackamas County has had yet another great year in providing energy conservation education. We believe this will bring more clients in for weatherization services.
- Kits: At Clackamas County we “tailor” to the client’s needs in lieu of simply “handing out a kit”. For our gas customers the list is somewhat limited and will be dependent on what gas appliances the client owns and operates. All eligible households and workshop participants receive a kit.
- Furnaces inspections: Our “energy educator” does not inspect furnaces for replacement.

5. Program Funding/Accounting:

- Amount received from NWN \$13,017.00
- Of this, the amount spent \$14,502.59
- Breakdown of expenditures (in high level terms) \$12,873.03 Salary & Fringe. \$1629.56 supplies, telephone, postage etc.
- Percent of agency education funding is from NWN 7.9%

**Community Services Consortium – Lincoln, Benton and Linn Counties
NW Natural Energy Education
Program Year 2015-16 Reporting**

1) Overview: The energy education program at CSC is designed to help clients reduce energy costs by making improvements to the home and altering client behavior in terms of energy usage. The program consists of in home visits and workshops where the clients are referred by our energy assistance program.

2) Waitlist Management:

- Total waitlist 476
- NWN waitlist 98

3) Education Methods: The workshops are conducted by our Energy Education Coordinator. When clients come in to apply for energy assistance they are provided the opportunity to attend one of the workshops. The number of people attending varies from 4-12 and the workshops last 2 hours. The participants come from the full spectrum of utilities in our service area.

The in home energy education program is conducted by the weatherization auditors and is a component of the weatherization audit and is done during the initial home visit. Last fiscal year we conducted 19 in home energy education assessments for NW Natural clients.

4) Program Impacts: The main impacts of our program are to educate clients and empower them to reduce energy consumption while remaining comfortable in their home. We also provide each client with an EE kit. The kits contain weather stripping, spray foam, thermometers for checking room temps, fridge temps and hot water temps. It also has a humidity monitor, low flow devices for water conservation, rope caulk, foam outlet sealers and LED light bulbs. The auditors install these devices in the homes where applicable. Since this is done during a weatherization audit all furnaces and heating systems are check out and fixed or replaced as need be.

- Furnace repairs 1
- Furnace replacements 14

5) Accounting

1. Received: \$20,000

2. Spent: \$20,000

3. Breakdown of spend: \$15,000 or 75% went to materials and/or program delivery \$5,000 or 25% went to staffing

4. 19.5% of the agencies EnED funding comes from NWN.

**Housing and Community Services of Lane Co
NW Natural Energy Education
Program Year 2015-16 Reporting**

- 1. Overview:** Currently we require all weatherization clients to have an in home energy ed visit before they are scheduled for an audit. All HACSA auditors are trained and certified energy educators and provide in home energy ed visits. Each month we also provide two energy ed classes. These people are referred by energy assistance. About 10% of those homes are heated by NW Natural. In 2015 we offered an energy ed class to all the residents in income qualified multifamily complexes. This winter we will hold energy ed classes targeting current OLGA recipients with the hopes of increasing our NWN wait list.

- 2. Wait list highlights:** Since 2014, we contacted all 1,200 people on the waitlist and increased production and have cut our overall list to 457. At this point, even with new applicants the wait list is shrinking at a rate of 10-15 applications a month. In an effort to reduce the wait time, we have not been advertising our program. The goal is get the wait time down to under two years or under 400 applicants. With the enhanced NWN program our NWN wait list will not give us enough projects to achieve this year's production goals. We have started marketing specifically to NWN customers so we can get those numbers up without overloading the numbers for the other utilities.

- 3. Education methods**
 - **Workshops:** We held 24 one hour workshops at our facilities with a total of 408 participants. 34 of these participants were NWN customers.

 - **In Home visits:** The all qualified Weatherization applicants receive in home energy education before an energy audit is scheduled. This also allows us to do an early assessment of the home and helps us prioritize future repairs. With these visits, furnaces are inspected and all furnaces are repaired or replaced if not in working order. If there is no need for weatherization or other repairs, work on these homes ends with energy education. This past year we conducted 120 in home energy ed visits and 30 of these were NWN customers.

- 4. Program impacts:** We eliminated our ½ time free standing energy educator position and instead hired a 4th energy auditor. We have trained (at Oregon Training Institute) all of our auditors and our intake coordinator as Energy Educators. The energy ed home visits by trained auditors helps us prioritize and streamline our weatherization processes and allows us the flexibility of having the auditing/inspection capacity when it is needed and also systematically provide energy ed. At this point, the newest auditor provides the workshops. We do not provide energy ed kits since most of our NW Natural education goes to clients whose homes will be weatherized. The majority of Energy Ed. Funds goes to support staff costs and helps support the fourth full time auditor position.

**Housing and Community Services of Lane Co
NW Natural Energy Education
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5. Program Funding/Accounting:

- HACSA received \$11,764 from NW Natural. Of this, 100% was spent during the current program year. The funds were used to pay salary and fringe of Energy Educator. This represents 29% of HACSA's energy education budget.

**Mid-Willamette Valley Community Action Agency – Polk and Marion Counties
NW Natural Energy Education
Program Year 2015-16 Reporting**

1. **Overview:** MWVCAA Weatherization Services provides an EE workshop specifically tailored to NWN clients. Workshops are held prior to the weatherization process. These workshops are a great tool to help our low income NWN clients start saving energy and practicing gas safety well before the weatherization work begins. The workshop explains energy conservation tips, maintenance tips and safety measures tailored to a NWN client. These workshops are available for both our English and Spanish speaking clients.

As part of the OLIEE EE program we also provide community outreach to areas with gas homes. The outreach includes connecting with NWN clients at community events as well as presenting in schools. EE kits as well as CO alarms and other safety items are given to NWN clients who sign up for our waitlist. With this approach we are addressing energy education immediately as our clients sign up.

2. **Waitlist management:**

- 476 total households on waitlist
- 136 NWN households
- Narrative – Describe any issues or highlight success in addressing waitlist over the past year
Clients who are just signing up for the waitlist view energy education as an incentive towards the weatherization program as well as providing some initial energy savings and gas safety tips. The first year of the OLIEE program also affirmed this idea. Providing and requiring energy education as part of the weatherization process works well to get NWN clients engaged who are already on the waitlist. The only issues have been with getting current applicants who have been on the waitlist for a while to participate in the OLIEE EE workshops if they are not required. The approach that appears to work best has been to engage clients with OLIEE EE as they sign up for the waitlist or else requiring EE directly before starting weatherization.

3. **Education methods:**

Number of workshops conducted:

42 workshops at Weatherization (NWN clients only)

15 workshops in client home (NWN clients only)

2 group workshops in community (One middle school in Independence, one charter school in Pedee) (NWN client focused and majority of attendees were NWN clients)

At the workshops clients are given energy efficiency kits tailored to gas homes. The curriculum emphasizes maintenance of gas appliances, safety of gas appliances and carbon monoxide safety. Additional hands-on education is provided in office. Education about technical aspects of gas furnaces and hot water heaters is provided. Three gas furnaces with varying efficiency levels serve to help clients understand their gas appliances more thoroughly. An important gas safety

**Mid-Willamette Valley Community Action Agency – Polk and Marion Counties
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component of the presentation is teaching clients about back drafting and technical information about their gas systems through PowerPoint and video so that clients can understand when their gas appliances may not be working efficiently or safely. With this education we hope that clients will be able to better identify issues with their gas systems promptly and encourage proper maintenance. Our clients learned of these workshops directly from MWVCAA Weatherization through either a phone call or a letter.

Fourteen of the in home energy education visits were standalone education visits and one was a component of the weatherization work. These homes were selected on a case by case basis. If at all possible all weatherization workshops are intended to be held in office. When requested or needed, we will provide in home energy education. Fourteen of the in home energy education visits were selected because of their proximity to each other and we attempted to accommodate our clients' needs.

The two group workshops were both completed in local schools. One event had 15 attendees and the other event had 35 attendees. Attendees learned of these events from their teacher and/or school administration.

***Other methods: workshops and in-home visits are the most popular in last year's report, if you provide education via other means, please describe.**

Other methods of education include community outreach events. These events have been a successful way to engage NWN clients in Energy Education and to add NWN clients who need weatherization services to our waitlist. Part of the importance of these events is the number and diversity of potential applicants that we encounter. This fiscal year we attended events with over 3,700 people in attendance from areas with gas usage that may not otherwise know about our program. At these events we sign up and educate future waitlist applicants. EE kits, carbon monoxide alarms, smoke detectors, community EE kits and education material are given out to NWN clients who sign up for our waitlist.

4. Program Impacts:

The tangible impacts of the OLIEE EE program are seen from the applicants' immediate energy savings and their perceptions of benefit from the program. Across community events and energy education workshops we have provided 124 full energy education kits. Natural gas savings booklets, energy savings booklets and other energy education material are also distributed at these workshops depending on individual client need. From the 124 full kits that have been distributed, there were 228.742 MMBtu savings.

Samples of feedback from the EE workshops include:

- "Clear, simple, informative- thank you"
- "Well done. Good information."
- "Ashley was professional, courteous, and patient. The class was very informative. I'm glad I came."

**Mid-Willamette Valley Community Action Agency – Polk and Marion Counties
NW Natural Energy Education
Program Year 2015-16 Reporting**

- “Free items. Clarity was good.”
- “I feel it was a very well put together class, very good information”

This particular client feedback highlights some themes that are present throughout many of the workshops. Many of the workshop attendees seem to desire simple, usable information that can be easily applied at home, and free stuff to help apply these tips is a good benefit. The entirety of the OLIEE EE program from in house workshops, to outreach at community events, to providing energy saving materials allows for a holistic approach to help a wide range of our low income NWN clients who may not otherwise be served.

EE full kit contents:

- 1.5 GPM Showerhead
- 1.5 GPM Kitchen aerator
- GPM Bathroom aerator
- Eight LED lightbulbs (8.5 Watts)
- Fridge thermometer
- Freezer thermometer
- Coil cleaning brush
- Smart Power strip (7 outlets, one main outlet)
- Kill-A-Watt meter

In addition to kit if needed

- CO Alarm (107 given out)
- Smoke detector (159 given out)
- 218 additional LED bulbs
- Natural gas savings tips booklet
- Energy savings tips booklet
- Water savings tips booklet

5. Program Funding/Accounting:

- Amount received from NWN
 - \$22,000
- Of this, the amount spent
 - \$22,000
- Breakdown of expenditures (in high level terms)

Item	CO alarms	Full kit	Community Kit	LED	Smoke alarms	Educational booklets/brochures
Quantity	107	124	85	218 two packs	159	HUNDREDS/THOUSANDS
Cost	\$ 3,798.50	\$ 10,649.12	\$ 1,688.95	\$ 1,103.46	\$ 1,593.18	\$ 2,043.30

- Percent of agency education funding is from NWN

Multnomah County Energy Services Program
NWN Energy Education
Program Year 2015-2016 Reporting

Overview:

Multnomah County provides energy education in multiple venues. We are participants in 6-8 “Energy Fairs” throughout the year, including the 3 Fix-It-Fairs sponsored by the City of Portland. We provide workshops at all three of these fairs including at least one in Spanish. Participants of these workshops receive energy saving materials including furnace filters. Approximately 40% of all workshop participants are NWNG customers. In addition all homes receiving an energy audit receive comprehensive energy education presentation and materials. All applicants for our services receive a short energy education presentation, including energy saving tips. Furnace tune-ups were provided to 5 NWNG customers.

Waitlist management:

- Number of Households on waitlist in October 2015: **327**
- Number of NWNG Households on list: **117**
- Number of Households on waitlist in September 2016: **150**
- Number of NWNG Households on waitlist in September 2016: **34**

Multnomah County has changed our process to collect people interested in Weatherization and to process applications when they are within a 3-month window for receiving an energy audit. We have increased the number of NWNG households receiving audits per month, to 9. Currently we have 47 NWNG households in-progress.

Education Methods:

- Workshops:
 - 9 Workshops conducted
 - Schools and Ortiz Center
 - Workshops are for 1 hour with opportunity for questions and answers.
 - We served approximately 500 people through our workshops, with 200 NWNG customers.
 - Outreach for workshops is through the City of Portland networking, Sun Schools and community agencies.
- In-Home Education Visits:
 - 312 homes received energy education as part of our energy audit process. Approximately 100 were NWNG customers.
 - All homes audited by our program receive energy education services. Starting July 2016, nearly half of all audits are NWNG homes.
 - Applicants for energy assistance receive energy education tips and energy saving materials through our community agency network.

Multnomah County Energy Services Program
NWN Energy Education
Program Year 2015-2016 Reporting

Program Impacts:

- Funds for furnace repair and furnace filters have a direct impact on energy savings and efficiency. These are two areas that NWNG funds have allowed us to expand to NWNG customers. By combining NWNG funds with our other energy education funds, we have been able to increase the number of outreach events and serve additional Multnomah County residents.
- Energy Education Kits include faucet restrictors, low flow shower heads, energy saving calendar, LED light bulbs, refrigerator thermometer, shower timer, energy saving booklet, night light. At the Fix-It-Fairs the kit also includes furnace filters.
- All furnaces are inspected as part of the energy audit. Furnaces are tuned, repaired or replaced. Most NWNG households served had their furnace replaced with a more efficient furnace. 60 replaced furnaces; 5 repaired or tuned.

Program Funding/Accounting:

- Multnomah County received \$37, 617.76
- Spent \$16,473.91 through September 2016
- All funds went to energy education and energy saving material, except for approximately \$1500 for furnace repair.
- The NWNG EE funds make up just under 25% of all energy education funds for Multnomah County.

**Yamhill Community Action Partnership
NW Natural Energy Education
Program Year 2015-16 Reporting**

1. Overview

A. Provide your procedure for delivery of client education through energy education group sessions

When appropriate, households applying for energy assistance will be encouraged to attend an Energy Education Workshop where invaluable information will be provided on how to save energy, employ sustainable practices and health & safety i.e. Lead & Mold. YCAP delivers LIHEAP (EA) primarily through a mail-out application process in which energy education materials will be made available through a follow-up mailing. For actual appointments, energy education may be provided at point of intake and/or through follow-up mail-out. The schedule is updated quarterly, posted on the YCAP web-site and included in various mailings that go to household's through-out the program year.

Low-cost materials (kits) will be provided to households actively participating in the Energy Education Workshops. Depending on available funds, a small financial benefit may be credited to active participant energy suppliers.

B. Provide your procedure for delivery of client education through a home visit by energy educator

The Energy Educator/Technician will deliver energy education through a home visit. The home visit will be available (based upon funding availability) to eligible households requesting a home visit after attending an Energy Education Workshop or households waiting to receive weatherization services. At the time of the in-home visit the Energy Educator will provide the informational handouts provided at workshops if participant did not attend. The Energy Educator will actively involve the household to seek air leakage areas and may assist individuals with the installation of energy saving materials. It is anticipated that each household will receive the items listed under question 3, Program Impacts. The Educator/Technician will evaluate the dwelling for carbon monoxide detector(s) and smoke alarm(s) and install as per guidance. Other materials may be provided including but not limited to; closed cell weather stripping, caulking and gun applicator, and expanding foam insulation for large air infiltration holes. If the Energy Educator/Technician feels the above materials and/or other supplies are necessary, follow-up will occur with the Energy & Food Services Director. Energy education at this level provides the opportunity to pre-screen potential households for comprehensive weatherization services (i.e. wall, attic, or floor insulation, window and door replacement, and refrigerator replacement).

C. Provide your qualification criteria for participation in your Energy Education Program.

Eligible households include any whose income is at or below the USDOE and/or LIHEAP income eligibility guidelines. These levels are based on household size in relation to income and must have a documented energy burden. Both homeowner and renter households are eligible to receive benefits. Mandatory energy education is required of participants receiving weatherization and/or crisis bill assistance through the department.

**Yamhill Community Action Partnership
NW Natural Energy Education
Program Year 2015-16 Reporting**

YCAP Energy Services Department intends to provide ongoing Energy Education for individuals living in YCAP's Homeless Shelters. It anticipated individuals living in YCAP's shelters are there short term and will be transitioned to more stable housing within 6 months. Education and energy tips received can follow individuals from one living situation to the next providing the stepping stones to energy self-reliance. Low cost energy kits along with a home visit will be available for eligible households upon request after transitioning out of the shelter.

2. Waitlist management:

- Number of total households on your waitlist beginning and end of program year

Beginning program year October of 2015, the referral list started at 172 and ended with 288.

- Of that total, how many are heated with natural gas?

The past year, four (4) households identified natural gas as an energy source beginning October 2015. Additional referrals were added during the program year.

Note: Not all reported projects identifying NW Natural as an energy supplier use it for the primary heat source. In some instances natural gas has been supplying a water heater, kitchen appliance or both and the heating system utilized an alternative source.

Beginning the current program year October 2016, seven (7) households have identified natural gas as an energy source. Currently three (3) potential projects are in various stages of audit, inspection or deferral follow-up.

- Narrative – Describe any issues or highlight success in addressing waitlist over the past year
The department experienced two challenges this past year. The first challenge was identifying NWN weatherization-ready projects to participate in the weatherization program. The NWN referral list was at its lowest level over the past two years with exhausting all potential referrals by the beginning of summer. Beginning the current program year, the referral list has 6 households currently waiting follow-up and 3 in various stages of audit or deferral follow-up.

The second challenge occurred during the completion of weatherization services. Two projects anticipated to be complete by September 30th both had plumbing leaks requiring correction. The department only had one plumbing contractor on contract that experienced a high volume of work at the same time requiring staff to pursue a second plumbing contractor. This resulted in delays that pushed both projects into the next program year.

3. Education methods:

- Workshops:
 - Number of workshops conducted

**Yamhill Community Action Partnership
NW Natural Energy Education
Program Year 2015-16 Reporting**

Total workshops – 161 Thirty-seven (37) of those scheduled for NW Natural Customers and 19 workshops were provided in Spanish

- *Locations: YCAP conducted Energy Education either through workshop or in-home assessment. The department's long term strategic goal to improve service delivery is to evaluate expanding workshops located in various locations through-out the county.*
- *Workshop duration: Standard workshop length is two hours. With In-home assessments, additional time may be spent as the Educator/Technician completes the walk-through.*
- *Number of people/households attending workshops: Three-hundred-twenty-one (321) households (343 occupants) participated in energy education. Of the 321 households, forty (40) were NW Natural customers.*
- *How did participants learn of the workshops: Besides participants engaging in required energy education for weatherization and crisis assistance benefits, the department currently uses quarterly/annual mailings, verbal communication and posting schedule on the website. A component of the department's long term strategic goal is to explore various means of outreach that includes social media.*

- **In-home Education visits:**

In-home energy education assessments were completed in fifteen (15) dwellings this past year. Of those, five (5) received holistic approach weatherization and five (5) are in progress or pending weatherization. The outcome not always producing weatherization ready projects deferred five (5) this past year for the following reasons; Eligibility follow through, Property sold, Already weatherized, Roof leaking and Extensive mold located in attic/roof leaking.

The department has lacked a high number of NW Natural customers on the weatherization referral list for the past several years. Therefore, it has not been necessary to implement priority factors for selection of energy education and/or weatherization applicants. All potential referrals that have been placed on the list have been contacted over the past several years.

Previous comments shared with NW Natural

The area of capacity expansion aligns with the one of the Department Goals for the next two years: "Implement increased outreach, creative approaches, efficiency improvements and accessibility to expedited services." The following areas have been identified as action items under the department goal;

**Yamhill Community Action Partnership
NW Natural Energy Education
Program Year 2015-16 Reporting**

- *Stronger linkage to customers receiving energy assistance from the Northwest Natural customers receiving OLGA and/or GAP.*
- *The department is creating outreach materials specific to Energy Education outlining services provided by OLIEE Energy Education.*
- *Social media is currently under expansion and anticipated to provide a wide variety of postings on services provided by the Energy Services Department.*
- **Other methods:**
 - *Incorporated Energy-Financial video produced by Oregon Coast Community Action – ORCCA. Download file date: 08.24.15*
 - *As part of the over-all energy education component coupons for low cost energy saving items were inserted in mailings for households approved for energy assistance. Households were invited to visit YCAP to attend an Energy Education Workshop and redeem the coupon. The following items were made available; Magnet/thermometer and a choice of LED lightbulb, energy savings playing cards or LED nightlight.*

4. Program Impacts:

Pre and post testing is part of the curriculum with test results recorded. Records indicate of an average of 50% [energy and conservation knowledge] score by participants on the pre-test. Final post-test results show 98% of participants recording a test score answered all twelve questions correctly.

The influence of Energy Education into the day to day patterns and behaviors of household occupants provides short and long-term benefit for energy consumers. The immediate change may be seen as soon as the next energy bill and continues. The generational opportunity with households occupied with young children provides long-term benefits as future energy users with accounts. The following comments come from NW Natural Customers participating in Energy Education at YCAP this past year.

- ✚ *“The “energy technicians”, staff-were excellent in every regard! Meticulous, both the audit and the educational part.”*
- ✚ *“He brought up other good information to help bring down bill.”*
- ✚ *“Thank you for all the information you’ve provided and the video was well made and very informative.”*
- ✚ *“Good job very informative.”*
- ✚ *“It is amazing the amount of tips that add up and will save you money. They seem common sense but they all take a little thought.”*
- ✚ *“This was very educational, I learned a lot, I did not know. The educator did an excellent job of explaining and answering questions. She made me feel comfortable which made it easier to learn. Very nice 😊”*

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- ✚ *"Very informative, I learned more ways to save."*
- ✚ *"Mui bueno education para ahorrar energia."*
- ✚ *"Good information, presented well and accurate. I feel I can benefit from this information."*
- ✚ *"I learned a lot, things that will help me save money, electricity and gas, water too. Thorough & nice."*

- *Kits: All households participating in energy education receive an energy education kit. The Educator provides basic kit to all customers and offers the enhanced kit to the NW Natural customers. The following list represent the contents of the kit:*

The kit is provided in a reusable YCAP tote/grocery bag displaying sustainable concepts on the outside. Each bag provides the following items; Aerator(s) for kitchen/bath sinks, LED light bulbs, LED night light, magnet thermometer, water heater thermometer, refriger./freezer thermometer, shower timer, low flow shower head, digital temperature/humidity light switch plate, outlet caps/gaskets, rope caulk, water leak dye tablets and Teflon tape for plumbing modifications. Additional materials are optional and made available specifically to those households further down the referral list, NW Natural Customers or have the skill set to manage installing additional low cost energy materials; Window kits, door weather-stripping & sweeps, caulking with caulk-gun and expanding foam insulation.

- *Furnace inspections/repairs: As part of the in-home Energy Education assessment an inspection of the HVAC system occurs. If necessary this may also include a review of duct system if occupants raise concerns with distribution air flow. Of the fifteen (15) NW Natural in-home energy education assessments completed two (2) received tune-up servicing, one (1) required repairs and three (3) systems required replacement.*
- *Narrative: give examples of the participant feedback, or share a success story or two, or highlight a few education successes*

Success Story

A client applied and received energy assistance during the winter of this last program year. The electric bill was larger than average due to the client not using the natural gas furnace. Eventually, the owner of the rental property allowed YCAP access to complete an energy audit and evaluate the furnace. The energy audit uncovered that the 1980 gas furnace wasn't working properly. It was leaking at the gas valve inside the furnace. Numerous conversations occurred between YCAP's Energy Educator, Technician and the occupant regarding health & safety, incorporating energy education focusing on the heating system and holistic approach to weatherization. The success of those conversations led to establishing an affordable, energy efficient housing unit.

YCAP staff identified moisture concerns caused by a roof leak. The landlord did extensive repairs to the roof and sheetrock allowing weatherization services to continue. Weatherization services included additional ceiling & floor insulation, duct sealing/insulation, mechanical ventilation and a new 95% high efficiency furnace. Although weatherization was completed in June, staff continue to

**Yamhill Community Action Partnership
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work with the customer regarding use of the newly weatherized dwelling. The home owner and the tenant are both very happy with the improvements to the home. The client states that he feels much more comfortable and safe in the improved home.

Success Story

A household applied and received energy assistance in 2015 for a NW Natural account. The household was also placed on the weatherization referral list and identified as household meeting first priority status with Natural Gas. The Technician identified the need for corrective action related to health & safety concerns plus extensive repairs outside the scope of weatherization. The disconnected ducts and concerns with the furnace located in the crawl space convinced the homeowner to discontinue use of the natural gas heating system.

The home owner applied and received a rehabilitation loan from the Housing Authority of Yamhill County (HAYC) to correct several deficiencies. YCAP placed the project in deferral status during the early stages of the rehab work allowing staff additional time to work with the customer to identify a solution to heating the home. During this time, the household applied for and received energy assistance during program year 2016 continuing the eligibility. Staff from YCAP and NW Natural collaborated to resolve the heating system concern through the installation/relocation of a high energy efficient gas furnace by spring of 2016. The remaining portion of the weatherization work was released at that time. The previous system located in the crawlspace has now been removed thus no longer poses health and safety concerns.

YCAP's installation of weatherization measures, high efficiency furnace, ASHRAE fan and corrective health/safety actions complimented by the HAYC rehab program has sustained this affordable low-income housing.

5. Program Funding/Accounting:

- Amount received from NWN: **10.01.15 – 09.30.16** **\$ 9,007.00**
- Of this, the amount spent: **10.01.15 – 09.30.16** **\$ 3,949.15**
- Breakdown of expenditures **10.01.15 – 09.30.16**

Administrative

➤ Indirect allocated cost \$ 441.26

Service Delivery

➤ Wages/Benefits \$ 2,369.36

➤ Other – (Travel, Space, Utilities) \$ 168.98

➤ Direct Project Cost \$ 969.55

(EED Kit materials & HVAC Service) _____

Service Delivery Total \$ 3,507.89

Grand Total \$ 3,949.15

- Percent of agency education funding is from NWN **5 %**

2015-16 Mid-Year Report

Date Submitted:	December 9, 2016
Subrecipient Name:	Community Energy Project
Program Title:	DIY Weatherization Workshop
Prepared by:	Rob Hemphill

I. Progress towards outputs and outcomes

OUTPUTS	1 st Quarter (Oct-Dec)	2 nd Quarter (Jan-Mar)	3 rd Quarter (April- June)	4 th Quarter (July- Sept)	Total (Year to Date)	2-Year Goal
		33	43	2	0	78

1. PROGRAM SUMMARY

The Do-It-Yourself Weatherization Workshop is a program Community Energy Project has pioneered since 1979. The workshop is delivered to a target audience of low-income Oregonians, primarily in the Portland region. This hands-on workshop covers low-cost energy saving techniques focused on draft stopping that renters and homeowners alike will find valuable, including weatherizing windows and doors, basic air-sealing locations and technique, and basic furnace and water heater upkeep. Income-qualified participants receive a free kit of weatherization supplies to install in their home.

The workshop is funded by NW Natural, Portland Housing Bureau (PHB), City of Gresham, and Multnomah County, and each funder uses different criteria for counting participants. Because of this plural funding, at a workshop we may have PHB participants, NW Natural participants, and attendees who were welcome to learn but ineligible to receive the free energy-conserving materials. CEP examined all of the participants to guarantee they were eligible for a specific contract and spread participants between all the contracts when a participant was eligible for more than one contract. As such, in the first four quarters of this 2-year contract, CEP has served 180 NW Natural customers, 78 of whom were applied to the NW Natural contract.

2. ACCOMPLISHMENTS

This accomplishments section covers the entire Weatherization Workshop from all funding sources. It was through the entire program delivery we were able to identify 78 NW Natural participants, who participated in workshops alongside participants from the other contracts.

- In the 2015-2016 FY, 60 DIY Weatherization Workshops were held throughout the community to meet the contract goals for PHB, NW Natural, and Multnomah County. From these workshops, 78 participants were identified as NW Natural-eligible participants.
- Thirty-eight workshops (63%) were open to the public; remaining workshops were held specifically for a partner host agency's clientele.

- Of 60 workshops, 22 (37%) were offered in at least one language other than English. Workshops were offered in English, Spanish, Russian, Mandarin, and Somali. Additionally, CEP utilized a recorded version of the workshop twice, once in Spanish and once in Somali for audiences where there was no interpreter.
- The Weatherization Workshop benefited from the service of 31 volunteers, including 2 Volunteer Workshop Leaders, one bilingual surveyor, and 9 Kit Builders. Volunteers donated a total of 153 hours to the program year to date.

3. ENERGY SAVINGS:

Through follow-up surveys we conduct with workshop participants, we find that 65% of participants reported savings on their energy bill, and an additional 30% were not sure if they saw savings. Of those that reported saving energy, 35% saved between \$1-\$10 per month on their bills, 19% saved between \$11-\$20 per month, 23% saved between \$21-\$30, 8% between \$31-40, and 12% between \$41-50. For low-income households, these savings can be quite noticeable.

4. CHALLENGES AND SOLUTIONS:

Weatherization workshop season is relatively short and heavily influenced by weather. The season typically runs from October-January, dropping off sharply after that. But the past two seasons we have seen dramatic shifts in weather, creating warmer, wetter October and Novembers with unpredictable Decembers. Portland is also in the midst of a housing crisis, which is displacing our clients and creating fear around engaging landlords about even temporary changes to homes.

Workshops are held at many locations in and around the city. Building relationships with a host site takes months to grow, between introductions to the program, room reservation, and outreach to new participant groups. Scheduling with host sites typically begins in August, and targeted outreach, such as advertising in utility bills, is best conducted during the fall. NW Natural funding for the program was confirmed and received partway through the weatherization season, explaining our initial “slow start” to the contract being met, which will not be an issue in the second year, where we recognize that we have many clients to serve.

We worked with all three major utilities who promised to help advertise workshops in November, as well as several small newspapers who said they’d be interested in writing articles. We have also begun working with a wide variety of new and returning host sites, who help us to reach diverse communities often left behind by other programs.

5. NEW DIRECTIONS:

The funding from NW Natural enabled CEP to serve participants from outside of the city of Portland. Participants from outside of Portland represented 12% of all clients so far, and we intend to increase that share next year through more outreach and workshop locations. Additionally, we have received a small grant to serve those in the City of Gresham. This allows us to more easily serve NW Natural customers in all of Multnomah County, because we can provide supplies for every single participant. We have already begun relationship-building with new host sites and partner organizations, and are

confident in our capacity to complete the contract.

6. NW NATURAL PARTICIPANT TRENDS:

These trends apply only to NW Natural participants, not for the entire Weatherization Workshop Program as the ACCOMPLISHMENT section covers.

Race/Ethnicity – The Weatherization Workshop’s clientele is incredibly diverse. 51% of the clients identify as a person of color; 6% of participants are African American, 14% are Latino, and 21% of participants identify as Asian.

Service Area – Clients are overwhelmingly from East Portland – including North, Northeast, and Southeast, constituting 82% of clients. Residents outside of Portland represent a modest 14% of participants this year, and we intend to grow that number next year.

Income – Half of participants (51%) have extremely low incomes, under 30% of the Median Family Income (MFI). The next income group, between 31-50% of MFI is the second largest portion of participants (28%). The remaining participants (21%) have incomes between 51-80% MFI.

Home Ownership Status – Our participants are fairly evenly split between homeowners and renters, with 53% owning their homes and 47% renting.

Gender – The ratio of women to men is nearly two-to-one, with female-identified clients at 60% to 36% identifying as men.

Disabilities – 14% of participants identify as having a disability.

PARTICIPANT DEMOGRAPHICS REPORT

1. GENDER	TOTAL YTD	PERCENTAGE
Male	28	36%
Female	47	60%
Other	1	1%
Refused	3	4%
Total	78	

2b. RACIAL DATA: PARTICIPANTS CHECK ALL THAT APPLY	TOTAL YTD	PERCENTAGE
African immigrant or refugee	3	3.85%
Asian	16	20.51%
Black/African American	5	6.41%
Latino/Hispanic	11	14.10%
Middle Eastern	0	0.00%
Native American/Alaskan Native	3	3.85 %
Native Hawaiian	0	0.00%
Pacific Islander	0	0.00%

Slavic	1	1.28%
White	38	48.72%
Declined to answer	6	7.69%
Total**	83	

**Total is higher than number of people served, as 5 participants identified themselves as belonging to multiple categories.

3. INCOME (Required)	TOTAL YTD	PERCENTAGE
(Moderate Income) 51%-80% of MFI	16	20.51%
(Low) 31%-50% of MFI	22	28.20%
(Extremely Low) 0-30% of MFI	40	51.28%
Total	78	

4. RESIDENCE – AREA OF PORTLAND	TOTAL YTD	PERCENTAGE
NE Portland	26	33.33%
SE Portland	30	38.46%
NW Portland	1	1.28%
SW Portland	2	2.56%
N Portland	8	10.26%
Outside of Portland	11	14.10%
Total	78	

5. RENT/OWN	TOTAL YTD	PERCENTAGE
Rent	35	46.67%
Own	40	53.33%



CULLY 2.0

2015-2016 NORTHWEST NATURAL FUNDING RECAP

"We know our work is making a difference, and the heart of the program has shifted substantially over the past year."

CULLY 2.0

2015-2016 NORTHWEST NATURAL FUNDING RECAP

BACKGROUND | THE COST OF WORK

Enhabit has partnered with the Native American Youth and Family Center (NAYA) the past two years to bring critical home repair and energy efficiency upgrades to low-income homeowners in the Cully neighborhood. After one year of critical home repair work, it was clear that we were going to have to dive deeper in order to truly make an impact. Existing funding allowed us to complete some deferred maintenance projects, but in many cases, we barely scratched the surface. Many of the homes needed substantial repairs before we could even begin to think about weatherization measures. A difference was made by assisting in the completion of financially burdensome home repair projects, but there was still much more to be done. After asking our contractors to develop prioritized lists of work – both energy efficiency and repair related – it was identified that an investment between \$10,000-15,000 was needed per home. The funding we had in place was limited, resulting in a \$5,000-10,000 deficit per project.

IMPACT | NWN CONTRIBUTES

This year, the story has changed. We were awarded \$74,900 from NWN, allowing us to bridge this gap. \$70,000 was allocated to projects, and \$4,900 to administrative costs associated with program delivery. We anticipated \$8,000-10,000 per home with a goal of working in 7-9 homes for the year. During the 2015-2016 program year we were able to dedicate NWN dollars to 8 out of 12 homes served. Two of these were conversions from oil to natural gas. The four homes that did not receive NWN contributions were either ineligible by primary heat source, or had already had substantial energy efficiency upgrades completed prior to our initial visit.

PORTLAND HOUSING BUREAU

Cully 2.0 is well on its way into the third year with PHB. The 2016-2017 funding year began July 1, and we have hit the ground running. The additional funding awarded by NWN has allowed our team to effectively tackle much needed energy upgrades in the homes of the Cully community. We know our work is making a difference, and the heart of the program has shifted substantially over the past year.

PARTNERSHIPS | FUNDING & IMPACT



During the program year we leveraged both NWN and Portland Housing Bureau (PHB) dollars to execute our work. We met our goals with 8 homes at an average investment of \$8,740 per household for energy efficiency upgrades. All 8 homes received PHB dollars to complete some minor weatherization work as well as deferred maintenance repairs. In many cases, these repairs were crucial in getting the home to a point where weatherization work could begin. Two of the 8 homes had work completed during the 2014-2015 program year. We had the

opportunity to revisit these homes in an effort to take care of energy efficiency upgrades that we did not have funding to tackle before. The work in these homes largely consisted of: air sealing, mechanical ventilation, attic insulation, and basement/crawlspace insulation.

EFFICIENCY | COST EFFECTIVENESS

In developing project scopes we focused on low hanging fruit. Insulation and air sealing were the primary measures completed with NW Natural funding. Supplemental funding was used to complete the necessary repairs to ready the home for weatherization. These included roof leaks, pest issues, knee walls that needed to be enclosed, etc. Once the repairs were complete, our team used a deemed savings calculator to rank the most cost-effective weatherization measures. Based on this prioritization, many projects included both attic insulation and air sealing. In a few cases, we insulated crawl spaces and even walls, but due to the high cost of insulating an exterior wall, we typically stuck to air sealing and other insulation. When the entire shell is weatherized homeowners report a great difference in comfort but for the purpose of this project we focused on the lower cost, highest savings measures.

BENEFIT | ANTI-DISPLACEMENT

We have had the opportunity to connect with many of our participants from the first year of the program, and look forward to reconnecting with our participants from this year as well. Homeowners tell us that they now have the peace of mind that costly repairs have been taken care of. The additional funding has allowed us to not only take care of these repairs, but to also ensure that comfort in the home is increased. We have always focused on a holistic approach to energy efficiency and home health, and feel that we are now able to work towards this as well as affordability. A very small percentage on our homeowners have moved out of the neighborhood, generally due to extenuating circumstances such as caring for a relative in another state. Those who have stayed, intend to stay for the long-haul, and have expressed a sense of pride in their homes and neighborhood.



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REPORT NAME: 2015-2016 Oregon Low-Income Energy Efficiency (OLIEE) Annual Report

COMPANY NAME: NW Natural Gas Company

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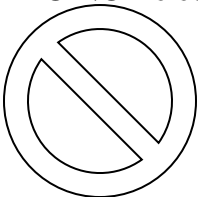
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