



DRAFT Coordinated Program Delivery Framework
PGE Community Benefits and Impacts Advisory Group
July 24, 2024

Agenda

Presentation objective

- About Energy Trust of Oregon
 - Current Energy Trust and PGE working relationship
- Energy Trust Program Design Overview
- Energy Trust and PGE Coordinated Program Delivery
 - Purpose, draft framework
 - Examples
- CBIAG Feedback

Presentation objective

Seek feedback about the Coordinated Program Delivery framework, desired outcomes and anticipated benefits for PGE utility customers

About Energy Trust of Oregon

Independent
nonprofit

Serving 2.4 million customers of
Portland General Electric,
Pacific Power, NW Natural,
Cascade Natural Gas and Avista

Providing
access to
affordable
energy

Generating
homegrown,
renewable
power

Building a
stronger Oregon
and SW
Washington



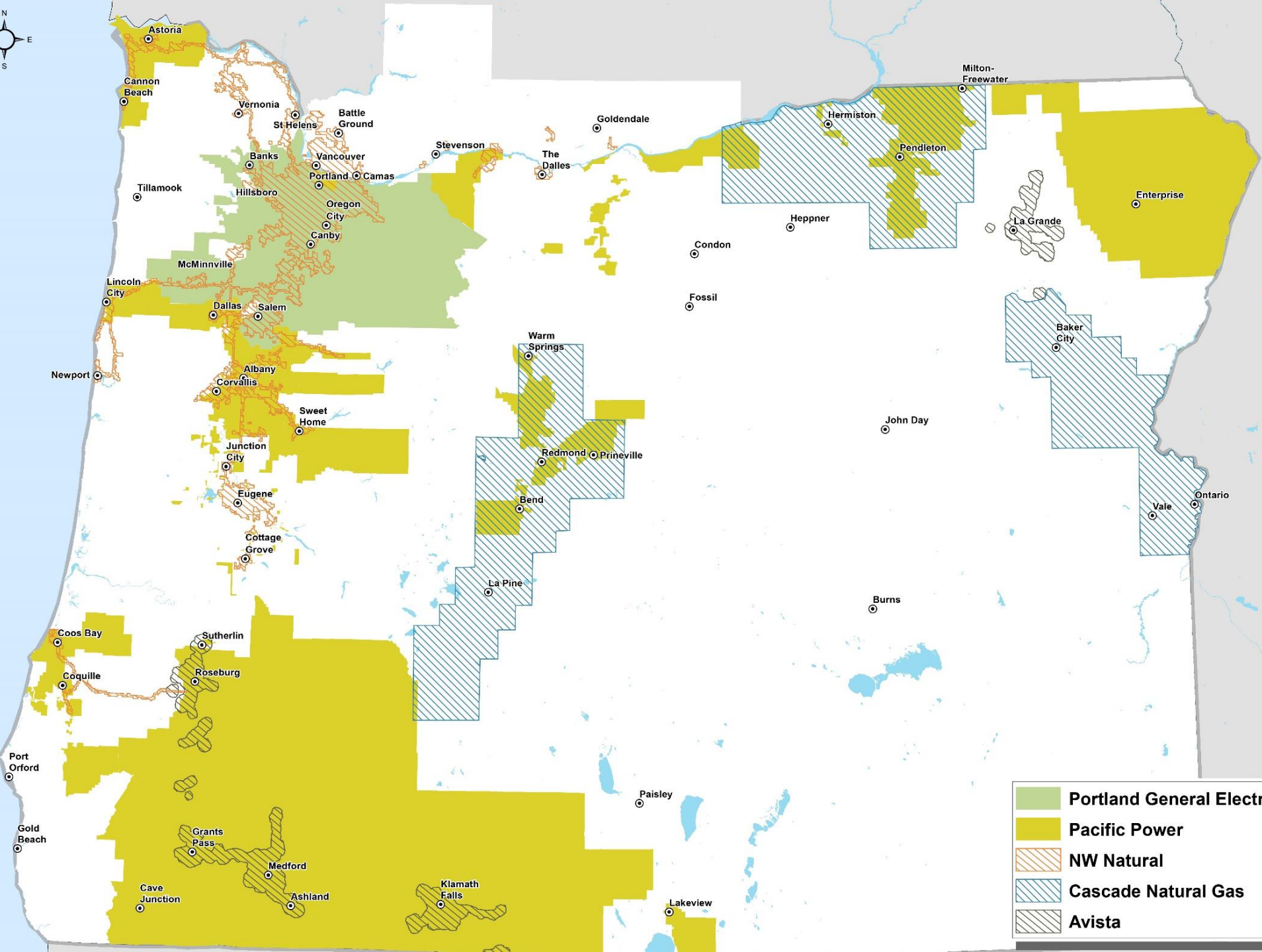
Our purpose:

Help customers and communities reduce costs and realize additional benefits by saving energy and using renewable resources

Energy Trust services

- **Information, cash incentives and services**
 - Energy efficiency
 - Renewable energy, grid-connected technologies
- **Serving all types of customers**
 - Renters and homeowners: existing and new homes
 - Businesses: existing and new buildings, including multifamily
 - Industrial and agricultural
 - Public and nonprofit organizations
- **Working with**
 - Network of trade ally contractors, retailers, distributors, architects and more
 - Community partners
 - Utilities and state agencies





Broadening the reach of clean energy benefits



Energy Trust is developing more no- and low-cost offers

Working with community partners
Fielding no-cost pilots to build delivery infrastructure and identify complementary funding



Emerging programs/funding to reduce energy burden

Federal Inflation Reduction Act
Portland Clean Energy Fund
Energy Burden Docket at OPUC

Current Energy Trust and PGE working relationship

Existing

- Partnering to serve customers since 2002
- Long-term resource planning
- Customer service

NEW

- Coordinated Program Delivery (“co-deployment”)

Energy Trust Program Design Overview

Current program designs



Serving people and businesses across our service area



With energy efficiency, small-scale renewable energy and battery storage offers



Through many partnerships and approaches (“market channels”)

Contractors/trade allies

Retail/distributors

Community partners (e.g., community-based organizations, community action agencies)



Informed by market intelligence and insights from customers and communities

From Design to Launch: How campaigns come together

- We start with the "who"
 - What do we know or not know?
 - Demographics
 - Interests
 - Needs
 - Awareness
 - Attitudes
 - Knowledge
 - Behavior
 - Housing characteristics



How we get input from customers and communities



Outreach managers and field staff embedded in communities across the state



Market information from past projects, surveys, evaluations and ongoing qualitative market research

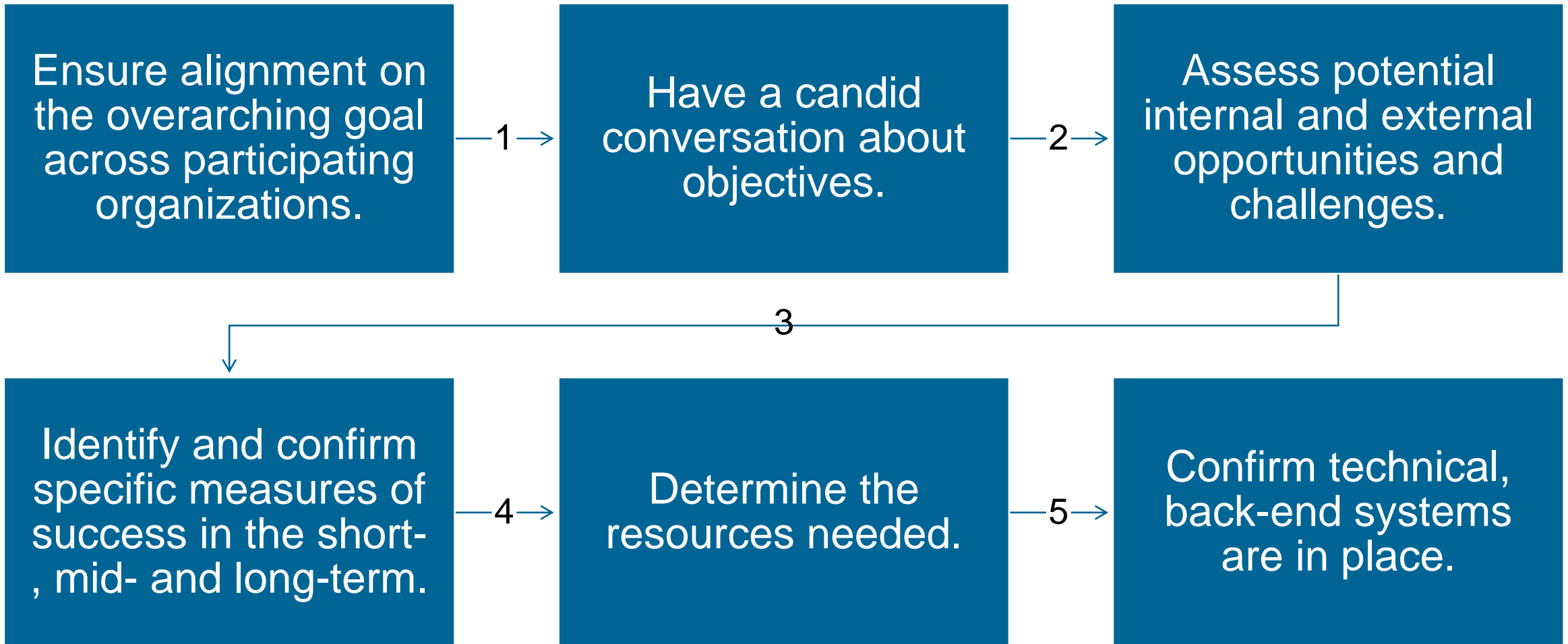


Community partner input



Advisory councils

From Design to Launch: How campaigns come together



From Design to Launch: How campaigns come together

- We develop the marketing and communications strategy.
 - What will we do or not do?
- Choosing not to do something is as much a marketing strategy as doing something.
 - E.g., Forgoing traditional media and focusing on grass-roots, community-based approaches that emphasize outreach
 - Leveraging public relations tactics, as opposed to promotional advertising, to complement the work of outreach teams
 - Using select digital platforms.



Sample of current campaigns

Mi Casa Website

Save Energy, Improve Your Home

Whether you own or rent your home, you can improve comfort and lower your energy costs with just a few simple changes. Energy Trust is here to help.

MAKE SIMPLE CHANGES TO SAVE ENERGY

Saving energy doesn't require a lot of money or time. Take these easy steps to get started today.

Lighting

- Use ENERGY STAR® rated LED bulbs.
- Turn off lights when not needed.

Water

- Install water-saving showerheads and faucet aerators.
- Use cold water for laundry and run full loads.

Heating and Cooling

- Set the thermostat to 65-68 degrees during the day and 58-60 degrees at night during cooler months.
- Clean or replace filters before and after heating season.

Appliances and Electronics

- Unplug battery chargers for phones, laptops and other devices when not in use.
- Use a countertop convection oven or microwave instead of the full-size stove when possible.

Air Sealing

- Add weatherstripping to drafty doors and windows.
- Caulk small holes and cracks under countertops and around ducts, pipes, fans and vents.

MAKE YOUR HOME WEATHER READY

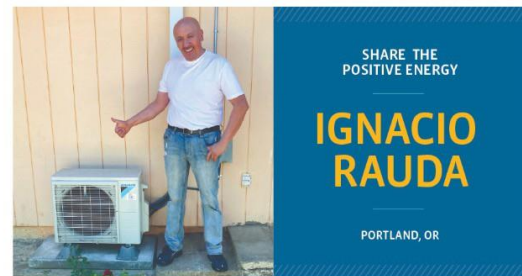
Is your home drafty? Too cold in winter or too hot in summer? With Energy Trust incentives, you can save on upgrades that help to fix these issues so you can enjoy a more comfortable home and healthier indoor air all year long.

Community Voices



Energy Savers: Ignacio Rauda keeps moving forward

September 27, 2022



Ignacio Rauda lives in North Portland with his sister and a blue-eyed cat he calls "mi niña." After seeing his energy bills climb last winter, he was happy to learn from a family member that Energy Trust of Oregon and Verde, a Portland-based nonprofit, were offering low-cost ductless heat pump installation in the neighborhood.



Mi Comunidad
Bonus Incentive
Social & Billboards



Questions on Energy Trust's Overview and Program Design?

Energy Trust and PGE Coordinated Program Delivery

Coordinated Program Delivery Framework

Working definition

Energy Trust and PGE work together where we have shared goals and objectives to bring more resources and market-ready offers to specific customer segments.

Why

A more accessible and seamless experience for customers to think more holistically about how they can manage their energy use by bringing together Energy Trust and PGE services

Co-deployment logic model: Example outcomes and impacts



Outcomes:

More program participation from customers jointly identified

Increased awareness of and access to clean energy offers



Impacts:

Utility bill savings through improved efficiency and/or renewable generation

Increased understanding of and control over energy usage/decisions

Questions on Coordinated Program Delivery Framework?

1. Is the purpose of the Coordinated Program Delivery framework clear?
2. Do you have feedback on the working definition of Coordinated Program Delivery?
3. What Outcomes and Impacts do you recommend we consider to decide on potential efforts?

Potential Coordinated Program Delivery effort: Current offers for customers experiencing energy burdens

Approach

- Providing customers experiencing energy burdens with existing Energy Trust energy efficiency, PGE flexible load and other services

Customer segments

- Leveraging Energy Trust and PGE insights to determine specific customers and locations

Market-ready offers

- Insulation/weatherization, heat pumps, heat pump water heaters, smart thermostats, income-qualified bill discount, community solar

How we reach customers

- Designing campaigns and engagements that resonate with customers
- Collaborating with community partners

Questions on potential example of Coordinated Program Delivery?

1. Do you have questions on the framework or approach being used?
2. What else should we consider or prioritize before we finalize and begin to apply the framework?

Discussion

CBIAG Feedback

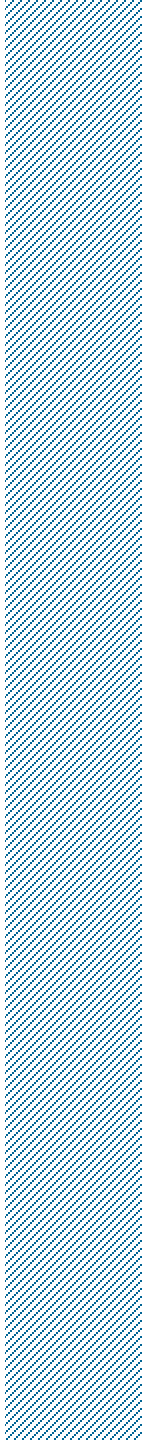
- What clarifying questions do you have?
- Is the purpose of the Coordinated Program Delivery framework clear?
- Do you have feedback on the working definition of Coordinated Program Delivery?
- What Outcomes and Impacts do you recommend we consider to decide on potential efforts?
- Using the energy burden reduction example:
 - Do you have questions on the framework or approach being used?
 - What else should we consider or prioritize before we finalize and begin to apply the framework?



Thank you

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Timeline

CBIAG feedback on the proposed co-deployment framework development and implementation is requested by August 1st for inclusion in the PGE Multi-Year Plan filing in Mid-Sept.

Discovery

Energy Burden Needs Assessment (EBNA) filed on UM 2211
(June 30th)



Engagement

Community Benefit and Impact Advisory Group (CBIAG) discussion of Co-Deployment
(July 24th)



Feedback

Collect and integrate CBIAG recommendations
(Aug)



Planning

File EBNA recommendations and embed Co-Deployment framework in PGE Multi-Year Plan
(mid-Sept)

