



Thurston Climate Mitigation Collaborative Executive Committee  
January 8, 2024

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# 2024 Regional Initiatives

Residential Energy Efficiency and Electrification Campaign  
Home Energy Score Model Ordinance

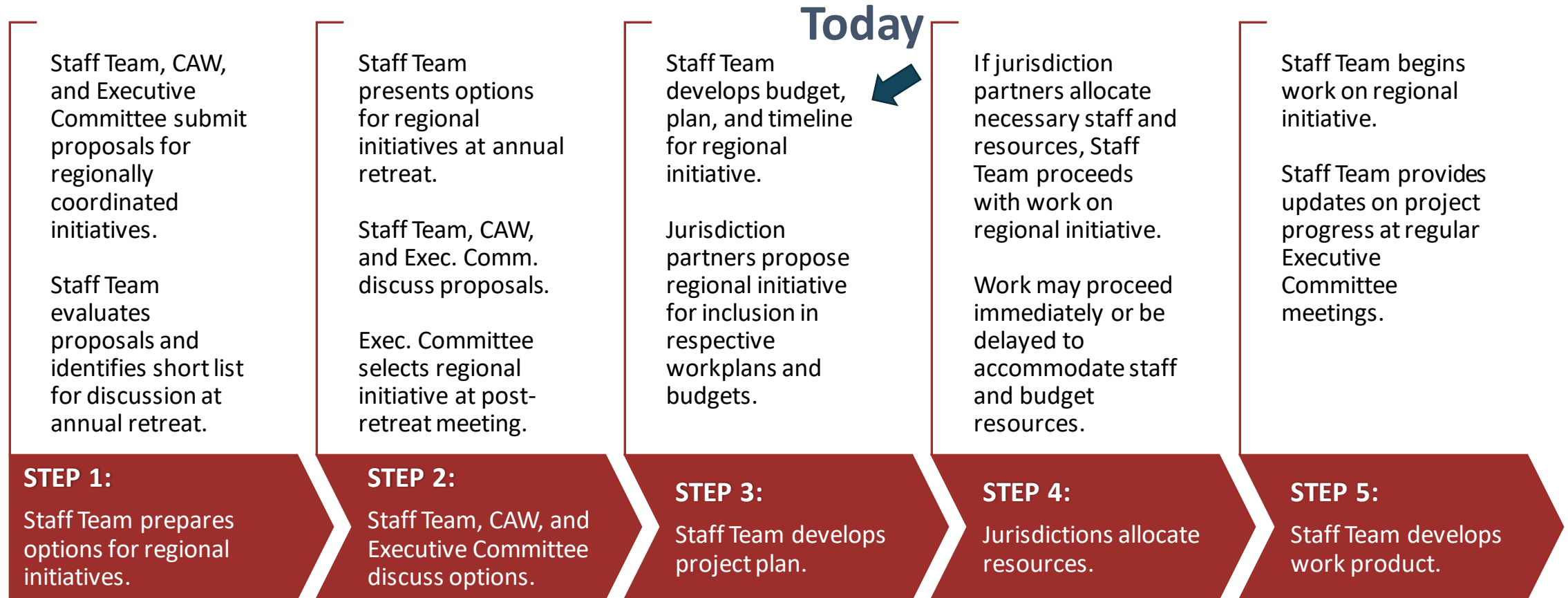
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## TCMC Staff Team

Rebecca Harvey, Thurston County  
Linsey Fields, City of Lacey

Pamela Braff, City of Olympia  
Alyssa Jones Wood, City of Tumwater

# Proposed Process for Regional Initiatives



Selection of a regional initiative by the Executive Committee does not guarantee that it will be implemented by the Staff Team. Jurisdiction partners must approve the necessary staff, resources and budget for this work to occur.

Executive Committee advocates for allocation of staff and budget resources.

Executive Committee supports and champions completed work product.

# Selected 2024 Regional Initiatives

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At the 6/24/23 Annual Retreat, the TCMC selected Regional Initiatives for 2024:

- Residential Energy Efficiency and Electrification Campaign (*EEE Campaign*)
- Home Energy Score Model Ordinance (*HES Policy*)
- Both initiatives directly align with TCMP Strategies:
  - B1: Reduce energy use in existing residential buildings.
  - B6: Convert to cleaner fuel sources.
- Both were determined to be substantially improved by regional coordination.

# Residential Energy Efficiency & Electrification Campaign

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2024 PROJECT PLAN:

PHASE I - DESIGN AND PLANNING

# Residential Energy Efficiency & Electrification Campaign

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## Background

The IRA has the potential to kickstart widespread residential decarbonization, with rebates and incentives to help households implement electrification and efficiency improvements.

However, many homeowners are unaware of electric technologies and their benefits and may not know how to take advantage of the forthcoming rebates.

Even those who are aware still face barriers to implementation including high upfront costs, lack of specific localized information, and limited technical support to guide them along the way.

# Residential Energy Efficiency & Electrification Campaign

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## Goals

- Accelerate residential building electrification and energy efficiency throughout the Thurston region
- Build and evaluate a foundational, holistic, and flexible program
- Raise awareness of climate, health, and economic benefits of electrification and energy efficiency
- Support energy equity by prioritizing benefits to LMI residents and overburdened communities
- Provide personalized, step-by-step technical guidance and support
- Quantify the number of home electrification and efficiency improvements resulting from the campaign

# Residential Energy Efficiency & Electrification Campaign

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## Campaign Structure

**Web-Based Information Hub** to provide education and location-based resources (Anticipated Launch: January 2024)

**Advisory Support Service** to answer technical questions and support action (Anticipated Launch: April 2024)

**Local Incentive & Outreach Campaign** to raise awareness and reduce financial barriers to action (Anticipated Launch: January 2025)

# Residential Energy Efficiency & Electrification Campaign

## Web-Based Information Hub (January 2024)

Regional “Switch Is On” Pilot

Partnership with King County, Pierce County, Seattle, and Tacoma

The regional SIO pilot will feature:

- Educational website with information and resources about heat pumps and electric appliances and tools to find incentives and local contractors.
- The website rollout will be accompanied by a regional outreach campaign including a kickoff event for local leaders, contractor and community events, social media, and paid media.





# Incentive Search Tool

Search for available incentives by location, type, eligible equipment, and eligible applicants.



## INCENTIVE LOOKUP FOR CUSTOMERS

**INCENTIVE TYPE** ▾

- REBATE
- TAX CREDIT
- FINANCING
- INDUCTION LENDING PROGRAMS

**BUILDING TYPE** ▾

- SINGLE-FAMILY
- MULTI-FAMILY

**EQUIPMENT TYPE** ▾

Choose ▾

**INCOME QUALIFYING?** ▾

- CONDITIONAL
- NO
- YES

**WHO CAN APPLY?** ▾

- HOMEOWNERS
- CONTRACTORS
- RENTERS

Zipcode  Home Function

SEARCH



**3C REN**

### Save \$500-\$750 Per Dwelling Unit - Rebate On Heat Pump Water Heater

**GET REBATE**

**LEARN MORE**

**REQUIREMENTS**  
Multifamily building project scope must include 3 or more energy efficiency or electrification measures. Bonus rebate of up to \$1000 for each heat pump installed. This incentive can be used in combination with the TECH Clean California incentive

**WHO CAN APPLY**  
 Contractors  
 Homeowners  
 Renters

**BUILDING TYPE**  
 Multi-family

**3C REN**

### Save \$500-\$750 Per Dwelling Unit - Rebate On Heat Pumps, Ductless (Mini-Split)

**GET REBATE**

# Contractor Search Tool

Search by zip code, services provided, and other criteria.

Contractors are vetted before being added to the directory. Contractors must:

- Sign a pro-electrification pledge
- Meet standard licensing and insurance requirements
- Have a proven performance record (positive reviews and ratings on reputable review sites)



## FIND A CONTRACTOR

Contractor Name (optional)  Zipcode  Distance from Zip

### REFINE SEARCH

#### SERVICES ▾

- AIR SEALING
- BATTERY STORAGE
- ELECTRICAL PANEL UPGRADES
- ENERGY AUDITS
- EV CHARGING
- FRESH AIR SYSTEMS
- HEAT PUMP CLOTHES DRYER
- HEAT PUMPS DUCTED (CENTRAL AIR, HVAC)
- HEAT PUMPS DUCTLESS (MINI-SPLITS)
- HEAT PUMP WATER HEATERS
- INDUCTION COOKING
- INSULATION
- SMART HOME CONTROLS
- SOLAR PV
- VARIABLE SPEED POOL PUMPS
- WHOLE HOUSE FANS
- WINDOWS

#### CERTIFICATIONS ▾

- TECH HEAT PUMP HVAC
- TECH HEAT PUMP WATER HEATING

#### REBATES ▸

#### CATEGORY ▸

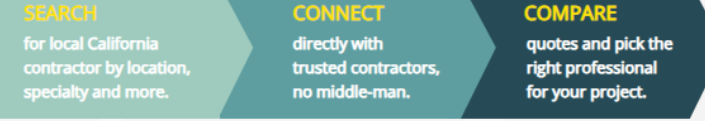
#### PROPERTY TYPE ▸

#### PROJECT TYPE ▸

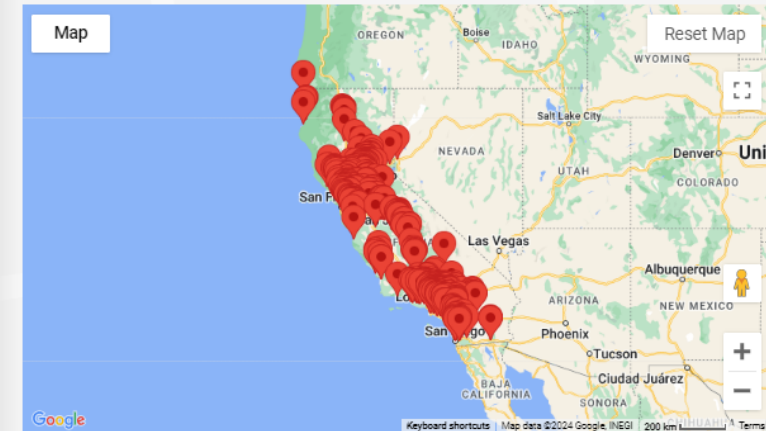
#### DIVERSE BUSINESS CATEGORIES ▸

#### LANGUAGES ▸

#### OFFERS ▸



(-) AIR SEALING



### Balcom Heating & Air Conditioning

SUNNYVALE

[VIEW CONTRACTOR PROFILE](#)

CLEAN ENERGY CONNECTION VERIFIED  
JULY 31, 2023



- Air Sealing
- Fresh Air Systems
- Heat Pump Water Heaters
- Heat Pumps Ducted (central air, HVAC)
- Heat Pumps Ductless (mini-splits)

### AirWorks Solutions

Somis

[VIEW CONTRACTOR PROFILE](#)

- Air Sealing
- Fresh Air Systems
- Heat Pumps Ducted (central air, HVAC)
- Heat Pumps Ductless (mini-splits)

# Residential Energy Efficiency & Electrification Campaign

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## Advisory Support Service (April 2024)

Personalized support service to make the information more relevant and actionable for individual residents.

Contract with existing software and service provider (e.g., Canopy Climate).

The advisory support service will feature:

- An online “personal electrification planning” (PEP) tool for customized, step-by-step recommendations to support residents throughout the electrification process.
- One-on-one personalized support (email, phone, and/or video calls) to answer technical questions and help residents plan and complete home electrification and energy efficiency upgrades.

Personalized  
electrification planning  
(PEP) tool:

Recommendations and  
Step-by-Step Guides

The screenshot displays the CANOPY website interface. At the top, the navigation bar includes the CANOPY logo, links for Benefits, Concierge, and Blog, an 'Add a reduction' button, and a user profile icon. Below the navigation, a breadcrumb trail shows 'Benefits > Heat pump > Guide', and a progress indicator shows '0% complete'. The main heading is 'Your guide to purchasing a heat pump'. A sub-heading explains that the guide is personalized based on shared information and includes checklists, quizzes, and other tools to help users feel confident. A 'GET STARTED' button is positioned above the first step. The first step is '1 Perform a home audit', which involves checking home insulation, windows, and appliances. It includes a blue 'Audit checklist' button, a blue 'Skip' link, and a green 'Complete' button. The second step is '2 Consider weatherizing your home first', which explains that weatherizing can reduce the need for a large heat pump system. It includes a blue 'See insulation, windows, and doors' button and a grey 'Complete' button. The third step is '2 Review rebates and tax incentives', which explains that these can reduce the cost of a heat pump. It includes a grey 'Complete' button.

CANOPY Benefits Concierge Blog Add a reduction

Benefits > Heat pump > Guide 0% complete

## Your guide to purchasing a heat pump

This guide is designed for you, using information you've shared. It includes checklists, quizzes, and other tools to help you feel confident every step along the way. Complete it at your own pace, and track your progress by marking steps complete.


GET STARTED

- 1 Perform a home audit**  
Check your home insulation, windows and appliances and more – so you're prepared when home equipment starts to age.  
[Audit checklist](#) [Skip](#) [Complete](#)
- 2 Consider weatherizing your home first**  
Properly weatherizing your home means that you won't need as large of a heat pump system, which can save you money.  
[See insulation, windows, and doors](#) [Complete](#)
- 2 Review rebates and tax incentives**  
Bring the cost of a heat pump down with available rebates, tax incentives, and financial assistance programs.  
[Complete](#)

1:1 advisory service to navigate projects, incentives and financing.

The screenshot shows the CANOPY website interface. At the top left is the CANOPY logo, followed by navigation links for Benefits, Concierge, and Blog. On the top right, there is a button labeled 'Add a reduction' and a profile picture of a woman. The main content area features a section titled 'TALK TO SOMEONE' with the sub-header 'Get advice from nearby advisors'. Below this is a paragraph explaining the service: 'Talk to an advisor near you to ask questions specific to your home or region. We can help with rebates, making a plan, assessing quotes, and more.' Two buttons are provided: 'Message us' and 'Schedule a call'. To the right of the text is a photograph of a living room with a grey sofa and a potted plant, overlaid with a red hand-drawn box and an arrow pointing to it. Below this section is a heading 'What our experts can do for you' followed by four bullet points, each with a green checkmark icon. The bottom section is titled 'What to expect' and contains three rounded rectangular boxes, each with a different icon: a clipboard, a document with a bar chart, and a calendar.

CANOPY Benefits Concierge Blog


Add a reduction 

TALK TO SOMEONE

## Get advice from nearby advisors

Talk to an advisor near you to ask questions specific to your home or region. We can help with rebates, making a plan, assessing quotes, and more.




[Message us](#) [Schedule a call](#)



### What our experts can do for you

- ✔ Provide detailed heat pump options that will work with existing systems in your home
- ✔ Assess your home's electrical panel, service, and energy efficiency issues
- ✔ Analyze how much you'll save on energy costs
- ✔ Help with financing options, including incentives, loans, and tax credits

### What to expect



# Residential Energy Efficiency & Electrification Campaign

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## Local Incentive & Outreach Campaign (January 2025)

**Design and plan in 2024** for a 2025 launch.

Build off the success and lessons of Energize Olympia.

Expand heat pump campaign to provide a wider range of services and incentives for all residents of Thurston County.

The local campaign will feature:

- Time-limited discounts for installations and services.
- Targeted outreach and marketing campaign.

# Residential Energy Efficiency & Electrification Campaign

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## Anticipated Funding Sources

### Switch Is On Campaign

- Thurston County, Olympia, King, Pierce, Seattle, Tacoma are contributing.

### Phase I - Design & Planning (2024)

- **Each TCMC jurisdiction will contribute \$14,875 from 2024 budget.**

### Phase II – Launch & Implementation (2025)

- Energy Efficiency & Conservation Block Grants:  
\$81,040 (Thurston County), \$112,030 (Olympia), \$150,000 (Lacey)
- Potential additional funding sources

# Residential Energy Efficiency & Electrification Campaign

## Phase I - Design & Planning

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### Step 1: Launch Advisory Support Service

January – April 2024 (evaluation in September)

#### *Step 1 Deliverables:*

- Executed ILA for 2024 Regional Initiatives
- Contract with Advisory Support Service provider
- Launch of Advisory Support Service and Personalized Electrification Planning (PEP) Tool
- Memo evaluating Advisory Support Service for potential inclusion in Phase II interlocal agreement



# Residential Energy Efficiency & Electrification Campaign

## Phase I - Design & Planning

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### Step 2: Background Research and Stakeholder Engagement

January – June 2024

#### *Step 2 Deliverable:*

- Memo summarizing market assessment, program and incentive research, partner engagement, and community forum

# Residential Energy Efficiency & Electrification Campaign

## Phase I - Design & Planning

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### Step 3: Develop Campaign Plan

June – August 2024

#### *Step 3 Deliverables:*

- Final Phase II Launch and Implementation Plan
- Draft ILA for implementation phase

# Residential Energy Efficiency & Electrification Campaign

## Phase I - Design & Planning

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### Step 4: Prepare to Launch Campaign

September – December 2024

#### *Step 3 Deliverables:*

- Executed ILA for implementation phase
- Contract(s) with installation partners
- Communications Plan and Materials
- Partner and volunteer kickoff/training (may be moved into Phase II)

# Home Energy Score Model Ordinance

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2024 PROJECT PLAN

# Home Energy Score Model Ordinance

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## Background

Lack of information on home energy performance is a significant barrier to improving energy efficiency of existing homes.

Several cities and states have developed residential home energy labeling policies and programs to increase consumer awareness of home energy performance.

Home energy assessment and disclosure programs provide homebuyers and occupants with an assessment of home energy performance, expected energy costs, and recommendations for cost-effective improvements to reduce energy use and costs.

# Home Energy Score Model Ordinance

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## Alignment with State Policy

The WA state legislature will likely consider a bill in 2024 to standardize home energy labeling using the Home Energy Score (developed by the United States Department of Energy) to adopt rules and implement a program for the licensing of home energy assessors.

If passed, the TCMC will align its residential performance disclosure ordinance with the state Home Energy Score and licensing requirements.

# Home Energy Score Model Ordinance

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## Model Ordinance Goals

Design and propose a regional HES Disclosure Policy for consideration by the TCMC Jurisdiction Parties in early 2025.

Proposal goals include:

- A regionally consistent policy
- A path to connect homeowners/occupants to existing and forthcoming resources.
- It will support energy equity and housing affordability by providing subsidized home energy assessments and additional resources.
- Increase implementation of home energy efficiency and electrification upgrades and retrofits.
- Develop a monitoring and reporting system to track implementation of home energy assessments and energy efficiency upgrades.
- Provide a mechanism for the real estate market to value both home energy performance and home energy improvements that reduce the cost of homeownership/occupancy.

# Home Energy Score Model Ordinance

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## Stakeholder Outreach

The largest portion of the planning for a HES model ordinance is the stakeholder engagement phase.

This policy plan includes steps for stakeholder engagement:

- TCMC Staff Team will review existing home energy assessment and disclosure policies, best practices and resources.
- Then the staff team will develop preliminary recommendations for key code concepts
- The staff team will then host focus groups to collect stakeholder feedback on the proposed concepts.
- After the initial feedback stage, the staff team will draft a model ordinance for review and feedback from key stakeholders, community members and jurisdictions partners.
- Based on feedback the staff team will then refine the proposed model ordinance, outline a supporting program to implement the proposed policy and estimate implementation costs.



# Home Energy Score Model Ordinance

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## Step 1 Policy Research (January-March 2024)

1.1 Execute ILA

1.2 Market Assessment

1.3 Policy Research

1.4 Policy Goals and Code Concepts

### Step 1 Deliverables

- Memo summarizing the results of Step 1 (market assessment, policy research, and initial draft of policy goals and code concepts).

# Home Energy Score Model Ordinance

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## Step 2 Stakeholder Engagement (March-June 2024)

2.1. Stakeholder Engagement Part 1: Conduct focus groups to collect stakeholder feedback on proposed policy goals and code concepts.

### 2.2 TCMC Engagement

- Briefing and discussion with Climate Advisory Workgroup on proposed Policy Goals and Code Concepts.
- Briefing and discussion with Executive Committee on proposed Policy Goals and Code Concepts.

### Step 2 deliverables

- Summary of focus group feedback

# Home Energy Score Model Ordinance

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## Step 3 Draft Model Ordinance and Proposal for Supporting Program (July-September 2024)

3.1 Draft Model Ordinance

3.2 Design Supporting Program and Preliminary Budget

3.3 Partners request budget to develop a regional home energy score supporting program in 2025

### Step 3 Deliverables

- Draft model ordinance.
- Proposed supporting program design and implementation budget.

# Home Energy Score Model Ordinance

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## Step 4: Refine Model Ordinance and Proposal for Supporting Program (October-December 2024)

4.1 Stakeholder Engagement Part 2

4.2 Brief jurisdiction advisory boards, committees, commissions, etc.

4.3 Brief TCMC Climate Advisory Workgroup and Executive Committee.

4.4 Revise model ordinance, program proposal and budget, as needed to address stakeholder and jurisdiction comments.

### Step 4 Deliverables

- Final model ordinance for consideration by all jurisdiction partners.
- Supporting program design and implementation budget.

# Home Energy Score Model Ordinance

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Step 5: Jurisdictions Consider Ordinance Adoption (target: January – February 2025)

Each jurisdiction will consider ordinance adoption.

# Proposed Budget for 2024 Regional Initiatives

Project Step and Task	Description	Total
<b>EEE Campaign</b>		
1.3 Personal electrification planning (PEP) tool	One year of localized web platform to support residents (homeowners and renters) throughout the electrification process. This PEP tool will be integrated into the foundational SIO website for access by Thurston County residents, based on user zip code.	\$7,000
1.4 Advisory Service	1-on-1 advisory service for residents to include both: <ul style="list-style-type: none"> <li>- Unlimited low-touch support via email</li> <li>- High-touch support via phone and video calls for a maximum of 200 calls</li> </ul>	\$12,500
2.4 Stakeholder Engagement	Contract services to facilitate stakeholder engagements ( <i>in coordination with Policy Component</i> )*	\$10,000
4.4 Develop communications plan and materials	Contract services to brand and develop outreach materials aligning with Energize Olympia and/or Switch Is On campaign.	\$5,000
<b>HES Policy</b>		
2.1 Stakeholder Engagement	Contract services to facilitate stakeholder engagements ( <i>in coordination with Campaign Component</i> )*	\$25,000
<b>Subtotal</b>		<b>\$59,500</b>
<b>Per Partner</b>		<b>\$14,875</b>

# Next Steps

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- Jurisdiction partners approve an Interlocal Agreement for the 2024 Regional Initiatives.
- Staff Team implements the Regional Initiatives as described in the project plans.

# Questions & Discussion



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