

**RESIDENTIAL ENERGY EFFICIENCY RIDER  
OPTIONAL WEATHERIZATION SERVICES – NO NEW SERVICE**

**Purpose**

Service under this Schedule is intended to maximize the efficient utilization of the electricity requirement of existing residential dwellings through the installation of permanent energy efficient materials. No new service after February 28, 2002.

**Applicable**

To residential Consumers billed under Schedule 4 in all territory served by the Company in the State of Oregon. This Schedule is applicable to existing dwellings built before January 1, 1992, with permanently installed operable electric space heating designed to heat the living space of the dwelling.

**Description**

Service under this program is available to improve the energy efficiency of applicable residential dwellings connected to Company's system. The Company will provide a Home Energy Check-Up that will include a home energy analysis which may include the installation of instant energy savings measures and other related energy services as well as access to financial assistance for the installation of cost-effective energy efficiency measures.

**Definitions**

- (1) **Residential Consumer:** A dwelling owner or tenant who, either directly or indirectly, pays a share of the cost for electric services billed by the Company under Schedule 4.
- (2) **Dwelling:** Real or personal property within the state inhabited as the principal residence of a dwelling owner or a tenant. Vacation homes do not qualify. "Dwelling" includes a mobile home as defined in ORS 446.003, a floating home as defined in ORS 488.705 and individual units in multiple-unit residential housing. "Dwelling" does not include a recreational vehicle as defined in ORS 446.003.
- (3) **Dwelling Owner (owner):** The person who has legal title to a dwelling, is the mortgagor under a duly recorded mortgage of real property, is the trustor under a duly recorded deed of trust, or is a purchaser under a duly recorded contract for the purchase of real property.
- (4) **Home Energy Check-Up (audit):**
  - (a) The measurement and analysis of the heat loss and energy utilization efficiency of a dwelling.
  - (b) An analysis of the energy savings and dollar savings potential that would result from installing energy efficient measures in the dwelling.
  - (c) Instant savings products may be installed and/or provided. These measures may include showerheads and faucet aerators, in residences with electric water heat, and compact fluorescent light bulbs. Energy services such as setting back the thermostats temperature setting on electric water heaters and metering the energy usage of refrigerators manufactured prior to 1993 may also be provided.

(continued)

**RESIDENTIAL ENERGY EFFICIENCY RIDER  
OPTIONAL WEATHERIZATION SERVICES – NO NEW SERVICE**

---

**Definitions** *(continued)*

(5) **Permanently installed mobile or floating home**

- (a) The dwelling must demonstrate applicable site improvements such as permanent footings, foundations or moorings plus permanent sanitary, water and electrical service.
- (b) The dwelling must not include potential for mobility, such as wheels, axles, and towing devices or the general absence of skirting, awnings, decking and accessories.

**Information to Consumers**

The Company will make available:

- (1) To all residential Consumers, upon request, information about energy efficient measures available through the Company and any other services which improve the efficiency of electric space heating and electric energy utilization of the dwelling.
- (2) To all residential Consumers, upon request, information about energy efficient measure financing available to dwelling owners.
- (3) To dwelling owners, upon request, where practical, information relevant to the specific site of a dwelling within the Company's service territory with access to: water resources that have hydroelectric potential; wind (which means the natural movement of air at an annual average speed of at least eight miles an hour); or a resource area known to have geothermal space heating potential.
- (4) One audit requested by a Consumer for a dwelling with permanently installed operable electric space heat designed to heat the living space will be provided free of charge at any one location, for any one Consumer.

**Cost-Effective Criteria**

The Company will offer financial assistance in accordance with this Schedule in an amount not to exceed the amount derived by multiplying the measure's expected annual kilowatt-hour savings by the appropriate following amounts:

- \$ .1437 per kWh for measures with an expected life of 7 years,
- \$ .2605 per kWh for measures with an expected life of 15 years,
- \$ .3125 per kWh for measures with an expected life of 20 years,
- \$ .3523 per kWh for measures with an expected life of 25 years,
- \$ .3828 per kWh for measures with an expected life of 30 years.

(continued)

**Financial Assistance**

- (1) The Company will offer to all qualifying dwelling owners a choice between the following incentives:
  - (a) A loan by the Company or another party not to exceed \$5,000.00, upon approved credit, to be used to pay for the energy efficient measures over a period of time not to exceed ten years. Minimum monthly payments will be \$15.00. The Company will provide all papers for the loan and will assure preparation of all documents necessary for completing the loan.

Interest will be paid at:

    - (i) Six and one-half percent (6.5%) annual rate for those measures, or portion thereof, which are in accordance with the cost-effective criteria of this Schedule; and/or
    - (ii) The interest rate established by the Public Utility Commission of Oregon, subject to Section 3 on Sheet 9-7 under Special Conditions, for all additional costs of energy efficient measures up to the maximum loan amount, or
  - (b) A cash payment of thirty-five percent of the cost-effective portion for each recommended energy efficient measure. The cash payment is not to exceed actual cost, or \$1,250, whichever is less.
- (2) Financial assistance will be available up to two times per dwelling, 2 cash payments or 2 loans, the total not to exceed the maximum amounts stated above.
- (3) If the dwelling is a rental unit, the following additional incentives are available to qualifying dwelling owners:
  - (a) If the loan under (1) (a) above is selected, the loan principal will be reduced based on the net present value of the tax credits received by the Company under ORS 469.185 to 469.225. The net present value of the tax credits shall accrue to the dwelling owner.
  - (b) If the cash payment under (1)(b) above is selected, an additional cash payment will be made which is equal to the net present value of the tax credits received by the Company under ORS 469.185 to 469.225.
- (4) Each qualifying unit within a multiple family residential structure will be eligible for financing under the terms and conditions of this tariff.

(continued)

**RESIDENTIAL ENERGY EFFICIENCY RIDER  
OPTIONAL WEATHERIZATION SERVICES – NO NEW SERVICE**

**Energy Efficient Measures**

Financial assistance will be provided based on the results of the cost effective analysis through the Home Energy Check-Up. At least one major measure described below must be installed to qualify for the rebate or loan. The energy efficient measures that may be eligible for funding are listed as follows along with their estimated measure life where applicable:

Major Measures:

- (1) Ceiling insulation up to R-49 for ceilings with less than R-30 in place. R-30 or better attics will not be further insulated: 30 years.
- (2) Floor insulation over unheated spaces up to R-30: 30 years.
- (3) Wall insulation or exterior insulation sheathing up to R-26 for walls with no insulation installed (financing will not be available for the installation of urea-formaldehyde wall insulation): 30 years.
- (4) Replacement windows meeting Chapter 53 of the Residential Energy Code: 25 years.
- (5) Storm windows: 15 years.

Supplemental Measures:

- (1) Attic ventilation, excluding power ventilators when installed with ceiling insulation (required if needed at the time ceiling insulation is installed). Whole house mechanical ventilation, and spot ventilation for kitchen and baths at time ceiling insulation is installed: Always considered cost effective.
- (2) Ground cover and water pipe wrap when installed with floor insulation; other vapor barrier materials as required when installed with floor or ceiling insulation: Always considered cost effective.
- (3) Forced air electric space heating duct insulation and sealing in unheated spaces: 30 years.
- (4) Weatherstripping and/or caulking, including blower door assisted air sealing and duct sealing: Always considered cost effective.

(continued)

---

**Energy Efficient Measures (continued)**

Supplemental Measures: (continued)

- (5) Thermal doors: 30 years.
- (6) Storm doors: 7 years.
- (7) Dehumidifiers and air-to-air heat exchangers when installed with storm windows, storm doors, thermal doors, caulking and/or weatherstripping of all openings allowing infiltration: Always considered cost effective.
- (8) Timed thermostats on centrally controlled multi-room heating systems except when used with heat pumps. Heat anticipating type thermostats for zonal electric resistance heating systems. Zonal thermostats must be separate from the heating unit and must be calibrated at the site to within 2 F of actual room temperature in the range of 65 F-75 F: Always considered cost effective.
- (9) Energy Efficient Showerheads and aerators: Always considered cost effective;
- (10) Fluorescent light fixtures: 15 years;

Nothing shall preclude the Company from financing the installation of a greater R value of insulation for the above items so long as it meets the cost effective criteria section contained in this Schedule.

(continued)

**RESIDENTIAL ENERGY EFFICIENCY RIDER  
OPTIONAL WEATHERIZATION SERVICES – NO NEW SERVICE****Provisions of Service**

- (1) Except for good cause beyond the control of the Company, a Home Energy Check-Up will be provided within 60 days of a request from a residential Consumer.
- (2) A Home Energy Check-Up must be completed before a dwelling owner may be considered for financial assistance in accordance with this Schedule.
- (3) Owner will be required to obtain one or more contractor bids for recommended measures that owner desires to install. Dwelling owners desiring to install the energy efficiency measures themselves shall secure one or more price quotes for material from local suppliers in lieu of obtaining contractor bids.
- (4) Owner will be responsible for the installation of recommended energy efficiency measures. Upon request, and without liability, the Company will provide information for owner installation.
- (5) Company will establish, for each dwelling owner requesting financial assistance in accordance with this Schedule, the maximum loan or cash payment amount available. Notice of the maximum amount available shall be provided to the owner after bid amounts have been obtained.

However, in all cases the maximum financial assistance, either a loan or a cash payment, will be based on an amount which does not exceed the actual cost of materials and labor. Owner's labor does not qualify for financial assistance in accordance with this Schedule.

- (6) Financial assistance will not be available for dwellings that are being remodeled or where the construction process increases or changes the living space of the dwelling.
- (7) Measures installed under this Schedule must meet or exceed the Company's Weatherization Specifications and comply with federal, state, and local building codes.
- (8) Owner will notify Company within 60 days after completion of the installation.
- (9) Company may inspect the installation to insure that the energy efficiency measures meet or exceed the Company's Weatherization Specifications when requested by the owner. At a minimum, Company will inspect 20% of completed installations and the first 10 jobs by a new contractor or one with past inadequate performance. The Company does not assume responsibility for the quality of workmanship or materials.
- (10) Company will provide or have provided to the owner the loan or cash payment amount established for the owner when the provisions of this Schedule have been met.

(continued)

**RESIDENTIAL ENERGY EFFICIENCY RIDER  
OPTIONAL WEATHERIZATION SERVICES – NO NEW SERVICE**

---

**Provisions of Service (continued)**

- (11) To secure loans a security instrument may be filed in the real property records of the county in which the dwelling is located.
- (12) Loans will require credit approval and will be secured by a promissory note.
- (13) Loan repayment shall begin within 60 days after disbursement of the funds.

**Special Conditions:**

- (1) Home Energy Analyses will be conducted to determine the estimated potential benefits of energy efficiency measures recommended, based upon actual consumption for the Consumer in the dwelling, and average local weather. If Company records do not contain sufficient data to establish a normal consumption for the Consumer in the dwelling, the Company will make a reasonable estimate of consumption for completing the audit. However, because of the variability and uniqueness of individual energy use, it is not possible to precisely predict the savings that will accrue to any particular dwelling. Therefore, the Company, by providing information in the course of a Home Energy Check-Up, will not warrant that the energy saving materials that it proposes be installed, will achieve any specific savings for any particular Consumer.
- (2) Loans made in accordance with this Schedule must be paid in full upon sale or transfer for consideration of any legal or equitable interest in any part of the property.
- (3) The interest rate for supplemental financing for any Consumer will be computed so that the combined rate for cost-effective measures and the additional cost of energy efficient measures does not exceed 12 percent. If the combined interest rate as determined on Sheet 9-3, Section 1, exceeds 12 percent, the interest rate for the additional measures will be recalculated so that the combined interest rate does not exceed 12 percent.

**Rules and Regulations**

Service under this Schedule is subject to the General Rules and Regulations contained in the tariff of which this Schedule is a part, and to those prescribed by regulatory authorities.