




July 2011 Update to the trade ally rating system




On July 1, 2011, Energy Trust updated the rating system criteria for Existing Homes trade allies to include region-specific criteria and average measures per project (or site address). This new criteria will enhance the value of completing multiple-measure projects and improve representation of trade allies in rural regions. Measures are defined as separate incentive applications which are submitted to the program for the same site address.

Trade ally ratings are assessed on a quarterly basis (January, April, July, October) and it is highly recommended for trade allies to periodically check their records for accuracy. For more information, please email existinghomesta@energytrust.org.

As of July 1, 2011, the ratings criteria are as follows:

Region 3*			
			No stars
Minimum of 15 projects submitted in the past 12 months –OR– Minimum of five projects submitted— with an average of at least two measures per project—in the past 12 months	Minimum of five projects submitted in the past 12 months	Minimum of one project submitted in the past 12 months	No projects submitted in the past 12 months
Quality control score of 95 or more	Quality control score of 91 or more	Quality control score of 85 or more	Quality control score of 85 or less
No unresolved customer concerns	No unresolved customer concerns	No unresolved customer concerns	Unresolved customer concerns
Attended Existing Homes Trade Ally Program Training Webinar and Existing Homes Weatherization Specifications Webinar in the past 12 months	Did not attend Existing Homes Trade Ally Program Training Webinar and Existing Homes Weatherization Specifications Webinar in the past 12 months	Did not attend Existing Homes Trade Ally Program Training Webinar and Existing Homes Weatherization Specifications Webinar in the past 12 months	Did not attend Existing Homes Trade Ally Program Training Webinar and Existing Homes Weatherization Specifications Webinar in the past 12 months

Regions 9, 10 and 11*			
			No stars
Minimum of three projects submitted in the past 12 months	Minimum of two projects submitted in the past 12 months	Minimum of one project submitted in the past 12 months	No projects submitted in the past 12 months
Quality control score of 95 or more	Quality control score of 91 or more	Quality control score of 85 or more	Quality control score of 85 or less
No unresolved customer concerns	No unresolved customer concerns	No unresolved customer concerns	Unresolved customer concerns
Attended Existing Homes Trade Ally Program Training Webinar and Existing Homes Weatherization Specifications Webinar in the past 12 months	Did not attend Existing Homes Trade Ally Program Training Webinar and Existing Homes Weatherization Specifications Webinar in the past 12 months	Did not attend Existing Homes Trade Ally Program Training Webinar and Existing Homes Weatherization Specifications Webinar in the past 12 months	Did not attend Existing Homes Trade Ally Program Training Webinar and Existing Homes Weatherization Specifications Webinar in the past 12 months

Regions 1, 2, 4, 5, 6, 7, 8 and 12*			
			No stars
Minimum of five projects submitted in the past 12 months —OR— Minimum of two projects submitted— with an average of at least two measures per project—in the past 12 months	Minimum of two projects submitted in the past 12 months	Minimum of one project submitted in the past 12 months	No projects submitted in the past 12 months
Quality control score of 95 or more	Quality control score of 91 or more	Quality control score of 85 or more	Quality control score of 85 or less
No unresolved customer concerns	No unresolved customer concerns	No unresolved customer concerns	Unresolved customer concerns
Attended of Existing Homes Trade Ally Program Training Webinar and Existing Homes Weatherization Specifications Webinar in the past 12 months	Did not attend Existing Homes Trade Ally Program Training Webinar and Existing Homes Weatherization Specifications Webinar in the past 12 months	Did not attend Existing Homes Trade Ally Program Training Webinar and Existing Homes Weatherization Specifications Webinar in the past 12 months	Did not attend Existing Homes Trade Ally Program Training Webinar and Existing Homes Weatherization Specifications Webinar in the past 12 months

**Regions are based on the location of the trade ally office. Please check the [Trade Ally Service Region Map](#) for more information.*

Website display of rating




As of July 1, 2011, rating-level indicators (stars) only appear when a customer searches for Existing Homes trade allies. Trade allies who participate in multiple Energy Trust programs will not have ratings displayed for other programs.

Energy Trust customers can find explanations of trade ally ratings in two places. The first is reached by clicking on a link above the initial trade ally search titled Ratings Legend. The Ratings Legend will display:

Trade Ally Rating System

Existing Homes contractors are rated to simplify the selection process. Ratings—indicated by one, two or three stars—are based on Energy Trust's experience with each contractor, and do not reflect their complete quality of work. Our rating criteria include the number of completed Energy Trust projects, observed quality of work and commitment to customer service. Only Existing Homes contractors have been rated at this time. Energy Trust will institute a rating system for other contractors in 2011.

Legend

-  Trade allies with this rating have met performance criteria based on a combination of quality of work, and a minimal number of completed projects with Energy Trust.
-  Trade allies with this rating have met performance criteria based on a combination of quality of work, and an average to above average number of completed projects with Energy Trust.
-  Trade allies with this rating have met performance criteria based on a combination of quality of work, and an above average number of completed projects with Energy Trust.

Customers searching for a trade ally will still be able to search by company name, Energy Trust program, service or specialty. The listing will initially be sorted by distance from the customer's zip code. Listings will not be sorted by rating level unless the customer chooses to view rating after the initial list appears.

A brief explanation will appear when a user scrolls and clicks over the question mark next to the rating of any trade ally.

Project count

Existing Homes believes your project count demonstrates a trade ally's familiarity with incentive applications, guidelines for customer participation and installation specifications. Project count is used as a baseline to measure participation; however, it is not the primary measuring tool for trade ally rating level. To be equitable to smaller trade ally companies and those who provide more comprehensive services, the number of measures per project will also be considered key criteria to a trade ally's rating.

Quality Control, or QC, score

All Existing Homes trade allies will begin with a QC score of 100. Fifteen percent of trade ally projects may be subject to QC inspections. New trade allies must achieve two passing inspections to be listed on the website. Trade allies will lose five points from their company's score for each major corrective action and 1.67 points for each minor corrective action. They will gain 1.67 points for each passing inspection, up to a possible total of 100. Under this system, trade allies have the ability to regain their quality control standing, even if some work requires corrective action. The [Weatherization Specifications Manual](#) and [Quality Control Policies and Procedures](#) are posted on the [Forms & Resources](#) section of the Trade Ally Portal.

Please note: Existing Homes will consider missing or incorrect information on incentive applications as a QC demerit. Ongoing missing, incomplete or illegible forms will affect a trade ally's rating, which may impact the number of stars displayed for the trade ally.

Webinars

The Existing Homes Trade Ally Program Training Webinar and Existing Homes Weatherization Specifications Webinar are offered monthly. These webinars offer free additional resources on program requirements, offerings and the most up-to-date information. Please visit the [Training & Education calendar](#) to register for an upcoming webinar.

Rating frequency

Trade ally ratings are recalculated each quarter (January, April, July, October). During this period, Existing Homes will look at each company's past 12 months of project and quality control history to determine the number of projects and measures submitted, quality control inspection results and customer service feedback. If a company's rating rises or falls during evaluation, they will remain at the determined level for the remainder of the quarter before reevaluation the following quarter.

Gas furnace installer considerations

Energy Trust strives to remain fuel neutral and does not advocate for a fuel source when promoting high-efficiency heating and cooling system upgrades. Although Energy Trust discontinued standalone gas furnace incentives and packaged gas water heater and gas furnace incentives for Oregon customers, Existing Homes still recommends high-efficiency gas furnaces as an energy- and cost-saving measure.

Trade allies who install high-efficiency gas furnaces in NW Natural and Cascade Natural Gas territories in Oregon can still count those installations toward their project volume. To submit gas furnace installations, please complete the [Furnace Installation Form](#).

Please note: Standalone gas furnace incentives are still available to Washington customers of NW Natural and Oregon customers participating in Savings Within Reach. Trade allies installing gas furnaces for eligible customers must submit the standard incentive application, not the data entry form referenced above.