

Commercial Portland Roundtable November 18th 2009

- Rebekah Skelly- Existing Buildings Program
 - applaud mechanical trade allies and thanks for hard work
 - \$2.2 million give out for prescriptive path
 - Change for next year: trade ally must bring in 2 projects in 2010- make sure we know about this and more details will follow with tracking system in place
- Jason with New Buildings Program:
 - 2010 moving MF program into new buildings program
 - enroll projects as early as possible
 - if want to become New Buildings trade ally- will have New Buildings webinar to learn about the program
- Judy with lighting program
 - Thank you for turning in lighting projects- many coming in
 - if projects not turned in but complete please get those in as soon as possible to get into this year
 - training session in January for 2010 guidelines
- Doug with Solar Program
 - very busy with in the solar program
 - New change: trade ally will be able to keep 30 projects active in the queue
 - no more than 12 can be commercial or in Pacific Power territory
 - Solar Pool heating: will be targeting this market next year with a large push
 - mostly in lodging, athletic clubs, and multifamily
 - incentive will be staying the same
 - Under-utilized application of solar
 - In order to preserve the budget need to lower incentive Nov 9th
 - incredible influx of incentives before the deadline
 - Renewable Energy Advisory meeting: going on now to come up with strategy to cover the projects
 - New funding level will cover those projects but issue of the deadline and cut off point
 - Good work on bringing in projects
- Dan Weldon with Green Street Lending Program
 - Eco Banking manager
 - 60% approval rate for loans
 - positive trend for number of projects brought in and number of loans approved
 - Green Street loan targets to trade allies only- competitive financial edge
 - marketing materials can be ordered on greenstreetloan.com under trade ally resources
 - Eco Banking initiative: projects larger than \$200,000 up to commercial real estate, equipment financing of \$1million- more options for larger commercial requests
- Tom general updates

- Moving towards electronic communication- environmental and cost impact
- roundtables more for discussion and informational
 - Renewable energy advisory council and conservation advisory council
 - make decisions and notes available on our website
- more training via webinars next year
- trade ally ideas:
 - for custom path it is a more individualized review that is really technical and it would be nice to understand engineers doing the study are actually talking about
 - would like more training led by an engineer to understand custom design and track more clearly
 - can send all suggestions to any staff
 - Also would be nice to learn about other financing options for customer
 - Network more formally to build relationships- would like social networking
 - would like to understand other products offered from trade allies
 - would like collaboration opportunities
 - Behavior change training- sales or marketing, ways to present information
 - Advisory committees: would like focus group to discuss program allies
 - raise awareness of what other utility companies are doing and they offer training as well
- New website:
 - distance search by zip code will be integrated in 2010
 - Trade ally portal separate from consumer pages: small writing on bottom left corner of page
 - trade ally comment: more cumbersome to find forms- they are now divided and before they were all listed on one page- know what looking for so don't want to click through all pages- suggestion to add quick links
 - add a page that shows all forms without the description since they know the forms already
 - liked how it was a spreadsheet before
 - know the number and would prefer all for all programs to be listed
 - Training & events calendar:
 - also lists other organizations
 - moving towards more online registration tools
- Customer Focus: reorganizing Energy Trust
 - sharing information and moving people across programs and focus on customer how they would see the process
 - attempt to remove barriers to make easier to understand us

- trade allies are a large piece of this and more of a focus on trade ally network
- more resources in rural areas of the states
- Roundtable will meeting will continue into 2010 with same format but feedback on this is appreciated