

Portland Residential Roundtable September 21, 2010

Tom Beverly: general updates.

We are very close to finalizing the trade ally survey and we got a better response than we have ever had. Over 400 responded so it has taken a long time to categorize all of the comments. Once the survey is finalized the results will be posted on the website. The Better Living Show will take place this year but Energy Trust will not be the title sponsor. Energy Trust will still be a sponsor and will still have a strong presence there. Booth registration is open right now and you can sign up at www.betterlivingshow.org. Cooperative marketing is available for these types of events as well as Energy Trust materials.

Matt Iacovone: new trade ally manager for the existing homes program.

We are only seeing a 4% drop in the number of projects coming in this year compared to last year but with the slower economy this is not that bad. Non-trade ally projects dropped 60% so more jobs are coming over to trade allies. We are seeing more measures per project so there are fewer jobs but larger projects. Since the trade ally rankings went into effect we are showing a higher quality control pass rate. Home energy reviews are down 30% from last year but at about average for past few years. Rankings will be refreshed on October 1st. Please check your profile to see where your company ranks. Top tier trade ally must attend two webinars once a year. So in 2011 you will need to attend the webinars again so your company is up to speed on any changes. October 5th and 6th are the next dates for training. The goal for next year is to improve quality, communication, and customer service.

Residential Energy Tax credit process for duct sealing has a new process.

You will need to complete two forms: Energy Trust form and RETC application. Send both forms back to Energy Trust and we will generate project ID numbers for ODOE and mail back to home owner to review and sign and turn back in to ODOE. Process might change but it will only get better.

Trade Ally Excellence in Building Conference and Expo and scholarships are available.

Weatherization boot camp hands on installer focused training. Home Energy IQ- customer education training. ACI conference in Portland February 1 and 2. Home Performance training next week.

Customer goals: reduce cost, improve comfort, ensure health and safety, and maintain environment. Sales and marketing techniques: use the news, address customer concerns and provide solutions, increase measures per project.

Scott Leonard: new homes updates. New incentives available for southwest Washington in NW Natural service territories. For builders there is a \$600 incentive for Energy Star new homes. There is also an incentive if you install a tankless water heater in a new home. These Washington incentives are available for the new homes program through September 2011.

Recently, the Oregon standalone incentives have been reintroduced. This is available up to the 2011 code changes and retroactively from June 2010. There are four different packages available. For Oregon standalone tankless water heaters they are incorporated into three of the packages. January 1, 2011, best practices new construction projects will be implemented. New best practices guide released this year. Best Practices training on October 26 in Portland. Energy & Environmental Building Alliance training also has discounts available for trade allies. Showerhead promotion starting the 26th for a free low flow shower head. Fridge recycling changed to \$50. Solar ready incentive of \$400 is available for homes that are pre-wired or pre-plumbed for solar; available on Oregon High Performance home now as well.

Dave McClelland: residential solar updates: During breakout session there will be a preview of the 2011 budget and will start talking about solar ranking system. We are looking at what is being done in existing homes and will be implementing a similar ranking system. We would like your feedback on the criteria to use. Solar specialty code will apply to all of your systems. Solar electric and solar water training webinars are in October and you can sign up online on the [training calendar](#). If you are a solar trade ally and have not done a project in the past year you will need to do another training session to remain active. Build It Green Tour in Portland and others across the state this month. It is a great way to showcase your business. Solar program in conjunction with Solar Oregon, City of Portland, and ODOE has created the Solar Now University. This is training for people wanting to become solar champions within the community. They can learn ways to promote solar and become community organizers.

General Updates: The trade ally portal of the website is separated out. To find it go to this by scrolling down to the bottom of the home page. From here you can find the training calendar that lists other organizations events to provide a one stop shop. Cooperative marketing: make sure to take advantage of this.

For the trade ally rating system we are looking at new ways of collecting customer service data. We are looking for information about happy customers and trying to collect customer experience in working with the trade allies as well. We would like to move to a customer service component as part of the rating. Question: Are there other ways to collect customer information? One trade ally suggested following up with customers and hand pick jobs that went well to get customer references and started to put together case studies. Another trade ally provides customer comment sheet that goes out in initial pack of paperwork with customers. When they mail final check back in they can include this form. 1 out of 4 responds back. Trade allies would like to be involved in creating the form. Another trade ally sets up a project follow-up meeting to get feedback on the process. They said that the only way to get well rounded feedback is to do it face to face. Would like to incorporate different ways and use an already existing system since it takes awhile to get feedback. Question: why manage one more

policing tool? You already do quality control of jobs and see if the QC person could sit down with the customer and ask them about the experience to collect the feedback. They are already there in the home and already have the customer's attention. Another trade ally said that they are already collecting the information and suggested that contractors submit their own feedback. With this feedback we would not put specific comments on the website. It would only be used as a ranking factor. Since we are looking for a level playing field quality control could be a good way to incorporate this.

Trade Ally Ranking Breakout session feedback:

Zip code distance search does not influence rating systems. If you plug in a zip code you will get a list sorted by number of miles to your location. The number of stars is not sorted with distance search. Customer needs to put in state as well with city. Ratings are updated quarterly and look back at the past 12 months. You must type in program name to see ratings specifically for existing homes. Question asked: What is the goal with the rating system? Before customers called us and there was no way to distinguish the trade allies with the large list. A trade ally asked if it is our job to choose contractors. This is also an effort for a customer to go deeper and get experienced, trained contractors who are going to get repeat business so we can eliminate barriers for customer and get more savings.

The ratings are based on the number of jobs because it is a good solid data and indicator of experience working with us and ability to help customers get their incentive. There is a legend on the website explaining the ranking system. One trade ally suggested changing this language to be more specific on the website. They would also like an option to pay top performing contractors directly instead of customers. We already do this with some programs but it does require more extensive agreements instead of looser trade ally agreement. Good option for small group of high performing contractors. Another trade ally suggested incorporating the types of jobs they are doing. They would also like to be able to compare with work that is subcontracted out but we gather information from company name submitted on the application so this could be difficult and the contractor is responsible for work done by subcontractor. Another trade ally suggested tracking the energy savings per job and cost effectiveness. However, this would be hard to separate out the type of jobs. Another suggested was to look at Home Performance contractors specifically. A trade ally noted that mandatory webinars only applied to 10% of the work they do. It is great to include all different types of diverse set of contractors but hard to meet everyone's needs. Another suggestion was if we could look at energy savings for home performance contractors specifically.

Meeting adjourned at 11:30 am.