

Residential Portland Roundtable November 30, 2010

Tom Beverly: General Updates. Next year we are looking at other options for trade allies and continued focus on customer service. For example, we are looking into direct incentive payments to top rated trade allies. That should make it easier for the customer to get an incentive or make a decision to go forward with projects.

EPS Score was brought up as a concern by trade allies that it will take away diagnostic testing opportunities from the home performance program. Trade allies were worried about unintended consequences. However, Energy Trust expressed the intent of this is to drive work to trade allies, as a way to generate more work for them and not take it away. This should help customers become more aware of their options and help them take the next steps. The EPS score is not static and could become more accurate over time. The testing method is still being determined and trade allies expressed interest in giving input into the score and who could do testing. Trade allies suggested creating a consumer facing marketing piece that explains all of this messaging so customers understand the differences between all the testing and scores. They would like to see a disclaimer explain the score and how it is not a home performance audit. Energy Trust will set up another meeting to discuss this more in depth with the trade allies.

Matt Iacovone: Existing Homes Updates. There are continued trends that customers are using more trade allies over other contractors and the measures per project are continuing to increase for trade allies. There is also an increase in quality control pass rate among trade allies and little improvement in non-trade allies.

Energy Trust is working closely with Oregon Department of Energy on the residential energy tax credit process. It should take ODOE 1-3 weeks to process the application. Energy Trust is handling the administrative process to reduce ODOE's administrative burden and save on additional fees for the trade allies.

The ratings will be updated on January 1st and we will update the logic in July 2011. A trade ally suggested looking at number of measures completed instead of number of jobs. Especially with Home Performance contractors, there are multiple measures per job, and each measure is a chance for a QC inspection. Energy Trust will complete a usability study on the website with customers, and the rating system will be a component of this.

A trade ally gave feedback on the webinars and said it is too hard to interact and ask questions with the webinar format. Others liked the webinars and said that it made it much easier for them. It turns out there were some technical issues with the last webinars, and the team at Existing Homes is working to improve them.

There will also be changes to the Existing Homes cooperative marketing structure for next year, so make sure to get pre-approval on all pieces. In 2011, Insider will still be the main way to receive updates, but we will also send out specific e-mails. One trade ally suggested making a consistent and bold header for the e-mail title, and we will work this into the process. Top tier trade allies will also be able to list their promotions on the promotions page.

The 2011 specification manual will be updated. Please submit suggestions, and there will be a webinar to go over suggested changes. Ductless heat pumps will become a regular incentive and will no longer be a pilot.

Scott Leonard: New Homes Updates. All projects installed after January 1, 2010 will have five new best practices requirements to receive an EPS score. Next year the reservation letter will be sent electronically. The model home incentive is due by December 15. So far in 2010, 523 homes have received an EPS score with energy modeling. In Southwest Washington there is a \$600 incentive for new homes and a \$200 incentive for water heaters. Some of the appliance incentives for next year include dishwashers, refrigeration, freezers, clothes washers, and fridge/freezer recycling.

Kacia Brockman: Solar updates. There are no major program changes at this time. For the Residential Energy Tax Credit new rules have been written and will be implemented at the end of December. You must install the system before the end of the year to be eligible under the old rules. The Business Energy Tax Credit is still uncertain and could expire at the end of 2011. The feed-in tariff is an alternative incentive structure based on capacity, and has been successful so far.

Kate Hawley: Southwest Washington updates. Energy Trust serves customers of NW Natural in Southwest Washington through the Existing Buildings, New Homes, and Existing Homes programs. The program reached its goal this year with 119,000 therms saved. There are 132 trade allies operating in Washington. 365 single family homes were retrofitted. 2011 holds plenty of new opportunity. A trade ally asked about Clark County PUD and we do connect and work with them for joint opportunities.

Brian Alfano: Umpqua Bank updates. Greenstreet lending was launched over two years ago and there have been many lessons learned, and ways to make the loans more appealing. There is a new home equity line of credit. They also now require that at least 51% of the loan is going to energy efficiency or solar power, but other items can be rolled into the loan, so it can be use for large projects. For example, if the loan covers comprehensive remodeling, and 51% will be used for energy projects, the homeowner can roll painting, flooring, roofing, or other projects into the same loan.

SW Washington Breakout session: Trade allies have not noticed many differences operating in Washington but responses have been lower. There have

been many instances where customers had no idea about Energy Trust and the trade ally had to make them aware, and tell them about our incentives. The trade allies have to convince customers that the incentives exist in Washington, since customers are skeptical of our name. Trade allies said the Department of Labor and Industries, in Washington, has been difficult to work with. Trade allies also said prices are very competitive in the market across the river. Trade allies received a few customers directly from utility bill inserts. The federal tax credit expiration has created a larger push from customers. If the customers do know about Energy Trust then the incentive is helpful for projects.

Another trade ally asked what happens when you do a Google search for Energy Trust Washington, and would also like to see more Washington information on our website home page. There was a general consensus that testimonials on brochures are not valuable and that testimonials would be more valuable on the website. Overall, we need to convince customers that we are there, and that the trade allies will do all the paperwork.