



Trade Ally Roundtable Existing Homes



Existing Homes Dashboard

January – July 2011

Trade Ally Network (324)		Non-Trade Ally (469)	
Projects	Measures	Projects	Measures
14,281	51,730	3,972	7,079
Average/Company (per Month)		Average/Company (per Month)	
8	31	2	4
Measure/Project		Measure/Project	
3.1		1.7	
kWh	Therms	kWh	Therms
15,186,046	542,510	4,196,239	189,922
Incentives	Per Project	Incentives	Per Project
\$7,195,179	\$503	\$1,348,399	\$339



2011 Trade Ally Ratings

- Most recent update: July 1, 2011
- Next update: October 1, 2011
 - Please check your company profile
 - Contact us with concerns:
 - ExistingHomesTA@energytrust.org
- Logic was updated July 2011
 - 3 stars (region 3):
 - ≥ 15 projects, QC score and webinars
 - ≥ 5 projects + average 2 measures per project, QC score and webinars
- Trade allies must attend two webinars:
 - Part 1 – Trade Ally Program Training
 - Part 2 – Weatherization Specifications



Updates

- Existing Homes Trade Ally Team:
 - ExistingHomesTA@energytrust.org
 - 1.866.365.3526
- 2011 Weatherization Specifications Manual
 - Effective: July 1, 2011



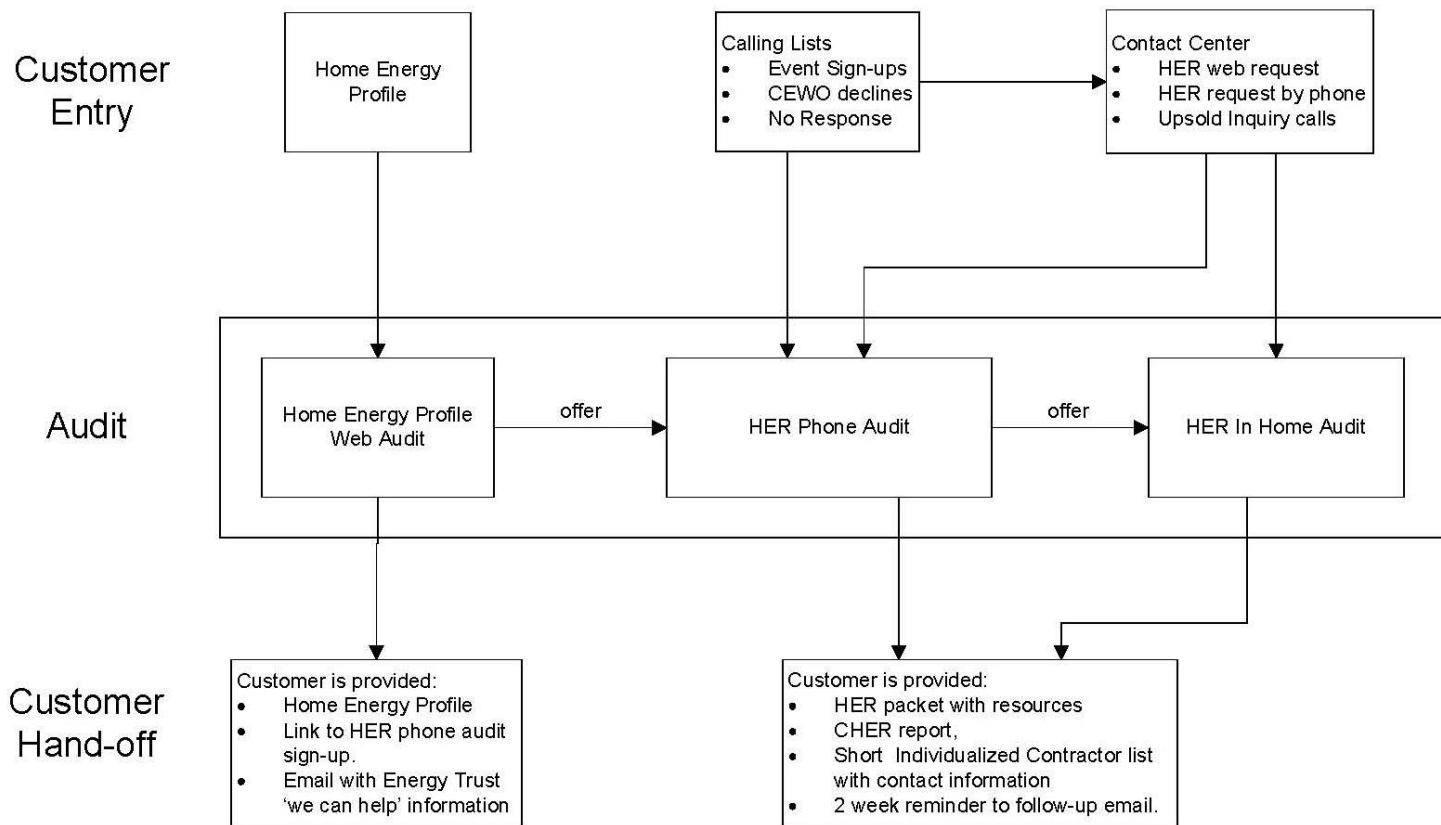
Updates – Customer Engagement

- Act Now bonus
 - \$100 to customer if installing measures within 90 days of customer engagement
 - Starting in October
- As of September 1, 2011:
 - 3 methods of customer engagement
 - Online
 - Phone
 - In-home



Updates – Customer Engagement

Customer Engagement Overview



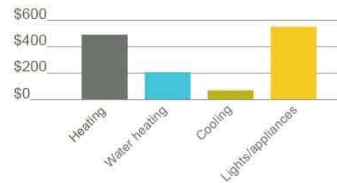
CUSTOM HOME ENERGY REPORT

ENERGY-EFFICIENCY RECOMMENDATIONS FOR YOUR HOME

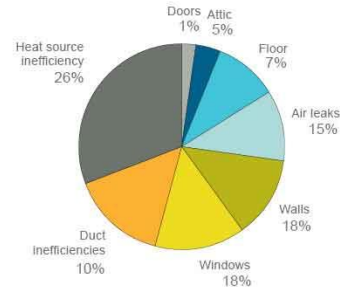
Report for: 12345 Example Road, Portland, OR 97217
Issue date: 02-01-2010

Year built: 1975
Prepared by: John Sweet, Energy Trust of Oregon

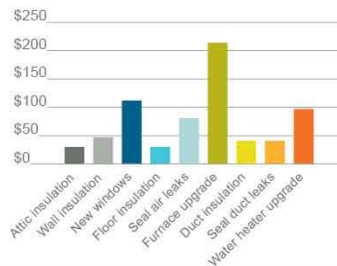
Current Annual Estimated Energy Costs



Where Your Home Loses Heat



Annual Estimated Energy Cost Savings



EXISTING CONDITIONS

Attic insulation	R-5
Wall insulation	R-4
Windows	single pane
Floor insulation	R-11
Air leakage	very leaky
Heating system	gas furnace, age, model #
Cooling system	type, age, model #
Duct insulation	R-3
Duct leakage	very leaky
Water heater	age, size in gallons, model #

RECOMMENDED IMPROVEMENTS

	Annual ¹ Savings	Energy Trust Incentive
Seal air leaks	\$	\$
Seal ductwork	\$	\$
Gas furnace	\$	\$

Keep up the momentum! Making the recommended improvements listed above could be your greatest opportunity to improve comfort and energy costs in your home.

OTHER OPPORTUNITIES

	Energy Trust Incentive
Solar water heater	Up to \$1,500
Solar pool heating	Up to \$1,500
Solar electric	Up to \$20,000
Recycle old refrigerator/freezer	\$50
ENERGY STAR® refrigerator	\$50 or \$100
ENERGY STAR freezer	\$50
ENERGY STAR clothes washer	\$50 or \$100
ENERGY STAR dishwasher	\$25

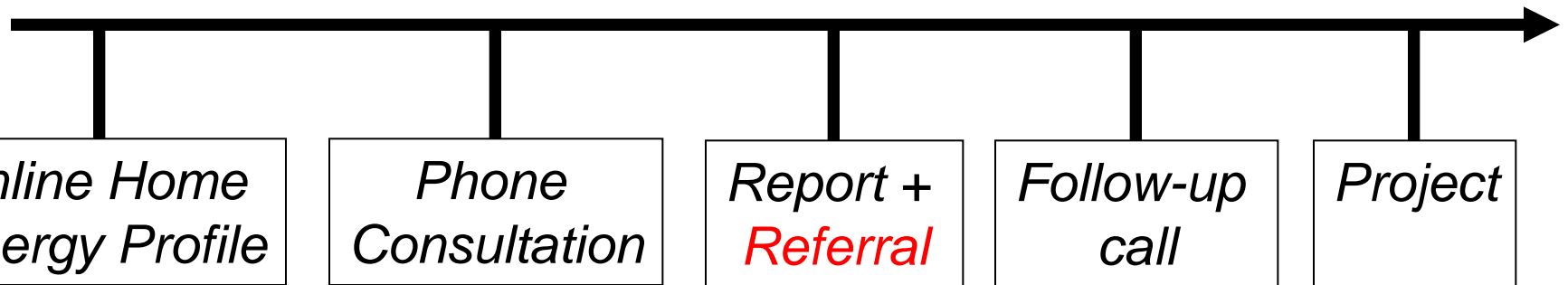
¹Actual savings and payback results may vary and are dependent on many factors such as occupant behavior and weather. Savings estimates will vary slightly with diagnostic testing. Current Annual Estimated Energy Costs and Annual Estimated Energy Cost Savings are based on the most recent 12 months of energy use at this location. If the occupancy of the home changed during this period, results may vary significantly.



Updates – Contractor Referral

Basic Existing Homes program customer flow

- Post-consultation: 3 TA contractors referred with Custom Home Energy Report via email





Context

Relevant customer engagement changes, as presented at May 18, 2011, CAC:

1. Guide customers through targeted information to customer specific need(s) and relationship building.
2. Expand role of Trade Ally as a favored technical resource for customers.
3. Customer service designed to drive customers to take action more quickly.



TA Contractor Referral Eligibility

1. 3-star or 2-star Trade Ally rating*
 - QC rates
 - Contractor activity

1.1 mi

Contractor Name

1323 SE 8th Ave
Portland, OR 97214-3400

Contact: [REDACTED]

Phone: (503)804-1746

Fax: (503)232-7924

Email: stephen@_

Url: <http://www> [REDACTED]

★ ★ ★ ?

Comprehensive Remodeling
Windows
Air Testing/Sealing
Home Performance with
ENERGY STAR
Duct Testing/Sealing
Heating and Cooling
Insulation
Builder

Info

•Approximately 97% of TA projects are by 3- and 2-star TAs.
Method applied in regions where sufficient numbers of TAs exist.

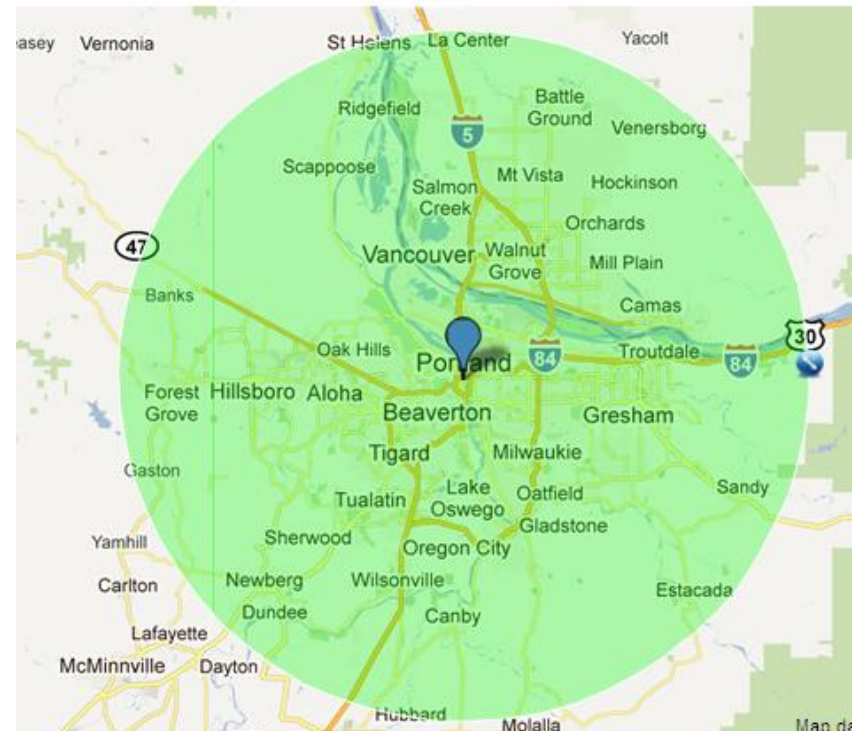
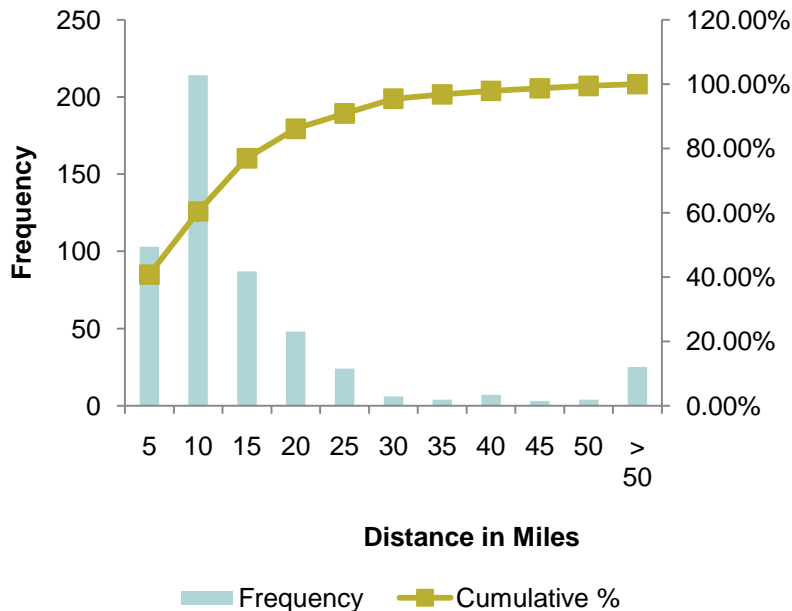


TA Contractor Referral Criteria

2. Geography

- 25 mile radius, minimum 20 contractors
- 100 mile max

Average Distance Travel Per Project





TA Contractor Referral Criteria

3. Measure history

- Installed recommend measure(s) within last four quarters.
- Random





TA Contractor Referral Criteria

Other features

- Randomization and referral queue
- Follow-up support
- Faster feedback evaluation

Timing: November 2011



Ductless heat pumps

- As of January 1, 2012:
 - New incentive level - **\$800** (from \$600)
 - Trade allies must be NW Ductless Heat Pump Project oriented contractors
- Upcoming trainings
 - Check trade ally training calendar or www.nwductless.com
 - Contractor orientation
 - October 12, 8am
 - November 9, 8am
 - Best Practices Installation
 - September 22, 8am
 - November 3, 8am
- For more information:
John Sweet: 503.523.4802



2012 incentive changes: Windows

- No change in incentive amounts
- New tiers to be:
 - \$3.50 per sq ft on **U-value .25 or less**
 - \$2.25 per sq ft on **U-value .26 - .30**
- U-.22 was designed to align with US DOE but is too aggressive; recent regional market data identifies opportunity to influence market capacity of products below U-.25



2012 incentive changes: Air and duct sealing

- Air sealing
 - Air sealing to be performed only by a qualified Energy Trust trade ally contractor
 - Other incentive requirements may change
 - Technical specifications may change
- Duct sealing
 - Technical specifications and incentive requirements may change



2012 incentive changes: Domestic hot water

- .67 Gas Tank Water Heater
 - Incentive increase to \$150 (from \$100)
 - Reduction of up-stream incentive (\$150 to \$25) provides greater consumer allocation for this emerging technology
- .62 Gas Tank Water Heater
 - Incentive no longer available (starting 1/1/12)
 - Aligns with ENERGY STAR, which moved from .62 to .67 in September 2010



2012 incentive changes: Domestic hot water

- Heat Pump Water Heaters (pilot):
 - \$500 Incentive on products that meet NEEA northern climate specification (Tier 2)
 - Contractor approved by NEEA and Energy Trust criteria
 - Unit must replace existing electric water heater to qualify according to pilot requirements



Existing Homes Marketing

Get a custom-fit energy-saving consultation.

Do you want your home to feel as good as it looks? Find out how to improve it beyond the surface with a Home Energy Review consultation, brought to you by Pacific Power and Energy Trust of Oregon.

Three consultation options – online, by phone or a home visit with an energy advisor – make it easy. You'll receive a list of cost-saving improvements you can make at your own pace. And free energy-saving products help you start saving immediately.

Get started now. Call Energy Trust toll free at 1.866.368.7878 or visit www.energytrust.org/improve.

Cash-back incentives help you improve your home.

As a Pacific Power customer, you can get cash incentives from Energy Trust when you make qualifying energy-saving improvements such as insulation, high-efficiency windows and solar water heating.

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Pacific Power bill insert



Existing Homes Marketing



CURB APPEAL IS SKIN DEEP. EFFICIENCY GOES ALL THE WAY TO THE FOUNDATION.

What you can't see from the curb you can feel when your home works efficiently to keep you comfortable. To improve your home beyond the surface, begin with our **Home Energy Review** consultation. Your end result is a guide to long-lasting energy and cost savings.

1

Begin your consultation online, by phone or at your home with an energy advisor.

2

Receive a list of cost-saving improvements you can make at your own pace.

3

Start saving instantly with free energy-saving products, following your consultation.



It's easy, quick and custom-fit to your home. Visit Energy Trust of Oregon at www.energytrust.org/start or call **1.866.368.7878**.

Serving customers of Portland General Electric, Pacific Power, NW Natural and Cascade Natural Gas.





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Thank you

Matt Iacovone

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