

Portland Residential Roundtable November 6th 2008

- Tom: Introductions
- Existing Homes Program updates- Marshall Johnson
 - Training opportunities- many in the upcoming months all on the training calendar
 - Reservation system for ductless mini split pilot program: contact Stephanie Vazquez
 - must attend training session to participate in this program
 - Multifamily program
 - Advantages: will do building assessment with you
 - quantify items that could receive an incentive
 - assists in processing incentives
 - nature of the work is similar to single family but just larger scale
 - New approaches program that would like to share with trade allies
 - instance savings measures available
 - Greenstreet lending: first session in Portland yesterday, way for consumers to use trade ally, must use trade ally for customer to participate
 - HES data team by the end of the month will have forms generator online
 - creates form online
 - Pilot currently going on
 - will be able to submit forms by e-mail or pdf by the end of the year
 - Welcome feedback on spec manual during break out
 - next roundtable will go over gathered edits
 - March 1st revised spec goes into effect
- Solar updates -Lizzie Rubado:
 - Market transformation program and lots of hand holding with customer and trade allies to expand market
 - solar electric and solar water heating
 - swh: serve water loads in residences
 - Feature collects and less square footage on roof and stores heated water so water heater does less work
 - Increasingly popular
 - Many options for HES trade allies to become part of solar network
 - must be a solar trade ally to participate
 - Webinar training session: Jan 15 and Jan 22
 - April: Northwest Solar Expo, 5 days of professional training
 - Federal tax credits extended for 8 years
 - Longest period of stability for solar
 - Residential side had a cap of \$2,000 but that cap has been removed to 33% of the total cost of the system
 - cap not removed from solar water heating systems
 - Cooperative advertising still available
 - November update: change in incentive levels
 - Free solar energy reviews: permanent program starting end of Jan.
 - basic site assessment: drive them to contact a contractor

- New Homes- Andrea Magee
 - new fridge recycling program: working with Jahko who will come pick up for fridge for free and give you \$30 back and they recycle most of the components
 - Cooperative advertising December 15th deadline for the end of the year
 - code increase and Energy Star levels also increased
- Home performance-Dave Hutchins
 - working to revamp software and working on reporting
 - HP contractors Webinar training in early December for updates on software
 - should stream line the process and create sales tool
 - Umpqua financing: Hp jobs cost more and great asset for the program
 - Accreditation opportunity: wants feedback from HP contractors
- Tom: General Info
 - Trade allies will receive shipments from Umpqua bank on the lending program
 - Flash drive with interactive demo for each trade allies
 - Online forms: month ago launched pilot for New Products program
 - Real estate professional trade allies are new group of trade allies
 - certified EA STAR realtors, and completed our training
 - Customers might starting coming your way from their contacts
 - ODOE: working on online forms for tax credits, and working with them
 - Feedback on breakout sessions: provide feedback
 - provide topics
 - suggestion add in Eugene area
 - Insider: new content, adding technical column, rotate between programs
 - Welcome feedback
 - Large advertising campaign and co-branding with the utilities
- Comments/ General Questions:
 - New to company and want to know ways to best communicate to customer the importance of being a trade ally
 - Cooperative marketing
 - listed on the website: used by customer frequently
 - can add your promotions onto our website: work with Stephanie Gray to add this for HES
 - The service territory: will be condensing down HES trade allies that actually do the work in that area instead of just checking off all the service territories based on projects completed
- Umpqua Bank: Green Street Lending
 - help trade allies build business by offering financing solution
 - 4 loan programs: very unique, residential and small commercial, includes MF
 - Trade allies most important piece, need a trade ally bid to offer loan
 - 75 locations in Oregon loan, marketing to large customer base and they refer them to trade allies, bring business to trade ally
 - www.greenstreetloan.com main web page, can access presentation and access rates, more information being added daily,
 - Program launches November 12th
 - 866-790-2121 main hotline number, can get you to Umpqua or Energy Trust

- Turn around time: 24 hrs for residential and business 48hrs
- Information communicated to customer, then customer tells trade ally
- 2 main qualifications for loan
 - Improvements for energy efficiency and solar
- Incentives and the loan, not either or
- Discussion Topic by Trade Ally
 - Incentives for new duct systems: why don't we pay for new duct work in existing homes?
 - existing duct system in order to get incentive for new duct system must do pre test on existing system and post test on new systems
 - If putting in new system and no replacing, no incentive available currently
 - might create incentive
 - water heater efficiency: still discussing boundary, looking at new incentives for 2009, new technologies that might come to market
 - Tax credits: energytaxincentives.gov is a good site to use
- Breakout sessions:
 - Umpqua bank
 - Solar
 - weatherization specification manual feedback