

## Portland Residential Roundtable May 19<sup>th</sup>

- Introductions and program updates:
  - Marshall: HES updates
    - Appreciate trade ally feedback and concessions made with incentive changes
    - Incentive level changes on the web
    - 2009 spec manual is out and additional available for purchase
      - After May all installations should use this guide
    - QC disciplinary policies:
      - probation process: added lesser level of punitive action so 1 major corrective action will be asked to attend online webinar session on specification manual
      - June 19<sup>th</sup> first webinar training of manual
      - more than 1 major corrective action will be removed from web
    - Mentoring services available: more direct support and can make request with Marshall- one of our technicians can help with 1 installation at no cost- onsite hands on
    - Carbon monoxide alarm- in order to receive air sealing and duct sealing incentive
      - If do not install it is a major corrective action
    - Gas bundle package no longer exists
    - Change in duct installation requirements: now duct sealing is a priority so now ducts must be tested and sealed to get duct installation incentive
    - improved forms: 2 forms will be released before end of month and change way submit incentives and increase time to receive incentive
    - air sealing: trainings for air sealing on training calendar
    - Training calendar: can register online now
    - 2 new webinars in June:
      - forms and resources: 1 hr
      - weatherization specification manual: 2hr
  - Kevin Tippet: Multi-family updates
    - June 18: Multi-family invitation workshop- trade ally event to get different trade allies to talk and network-introduce to other specialties and work together on projects
  - Andrea Magee: New Homes Updates
    - PTCS documentation: Duct sealing with new homes process is different than HES program
      - Decisions will be made and still figuring out the process
      - Call Andrea if any questions on the new homes side
      - HES duct sealing: incentive will automatically be submitted to PTCS and help with Residential tax credit
        - Not the same for new homes

- Stand alone incentives no longer available now- get rid of forms with this
  - New program based more on beyond code and doing more to get as many incentives as possible in project
  - Anything better than code could be eligible for incentives- way to up-sell and streamline process
  - Insider: primary mode of communication- for all trade ally programs
  - NEEA: put out communication about thermal bypass checklist- Energy Star Homes will start implementation in September 2009
    - start looking at it now
    - Ask Andrea for resources about this and trainings are available
  - New Model home incentive program: opened doors beyond Energy Star
    - Tiered incentives up to 3 model homes per yr per builder
  - cooperative marketing: focus on Energy Trust trade ally logo for new homes shifting from Energy Star- can still use both though
  - break out session will cover Energy Performance Score-tool now in marketing place to use as tool to know what home energy consumption is before moving in for homeowners. New initiative- existing homes will use this eventually.
- Dave McClelland- Solar Updates
- HES and New Homes trade allies went through renewal and now time for solar
  - if want to continue to be eligible for ETO solar incentives will need to renew and sign new agreement
  - Deadline June 30<sup>th</sup>- single umbrella agreement and refresh trade ally list with active contractor and better tool for you to get leads
  - changing requirements to 1 project per year but with other changes
  - listing on the website: will only be listed after completing a project for specific specialty you are offering on the web- there will still be another list that shows all the trade allies
  - Also new program guide and new system requirements: cleaner document
  - system requirements: major revision process: no major revisions
    - solicited from trade allies for recommendation and received much feedback
    - got together committee including some trade allies and hashed through recommendations
  - Solar Energy Reviews: launched program this month
    - 1 hr and available to potential customers who have attended training session but not taken next step and way to push them to next step
  - trying to do all communications through monthly news letter
  - For renewable energy- solar is best option for residential programs
    - open solicitation program: hydro projects available and not as formalized of a program

-Tom: General Updates

- Marketing Pieces that would help you?
  - we are updating them now so it this would be helpful to know so we can support your efforts
  - Home Performance educational piece- overview or power point presentation- video available on web now
    - 9 different pieces and requires time but good detail
- Website will be updated this fall
- Insider: feedback
  - Now goes out monthly to incorporate all programs and get less individual mail
  - by middle of the month: we should post the insider schedule so know when to look for it
  - side bar most important to get to specific programs
  - More people actually get it now
- Cleaning up trade ally list: make sure listed in correct service territories- who has actually performed in specific service territory to give customers accurate picture on who to call
  - Cleaned and change May 1<sup>st</sup>-notified that change was happening for HES program

-Umpqua Bank: Brian Alfano

- Bridge gap of financing
- can order fliers to give to customer on [greenstreetlending.com](http://greenstreetlending.com)
- can also order thumb drive from the web
- No fees and rate is competitive
- Can only be done through a trade ally- making sure it is only a trade ally
- Rolled out in November and made some slight adjustments and continuing to shift to fit needs of customers
- have lent a lot of money this year and just need to find borrowers who are qualified
- loan applications are being approved at a higher rate than regular loans

-Break out sessions