

## Bend Roundtable May 21<sup>st</sup>

- General Updates
- Marshall Johnson: Home Energy Solutions Program
  - Incentive level changes went through Conservation Advisory council that included trade ally's feedback
  - May 1<sup>st</sup> changes went into effect
  - Main incentive changes: Duct sealing and air sealing levels cut back and gas furnace went down
    - forms and resources page: incentive level sheet
  - 2009 weatherization manual also updated
  - Focus on website and Insider newsletter instead of mailing out multiple pieces
  - Quality Control requirements: more than 1 corrective action will be invited to weatherization manual webinar process
    - June 19<sup>th</sup> first webinar: open to participants
    - once a month
    - Also forms and resources webinar: 1 hr.
  - Form 300A-universal app
    - modified sample invoices
  - developing weatherization form for insulation and windows
    - generic invoice can be used
  - New form design for air sealing and duct sealing
  - duct insulation: ducts must be tested and sealed prior to eligible incentive for insulation
  - Duct sealing program completely aligned with PTCS
    - carbon monoxide detector must be installed if combustion appliance in house- also with air sealing
  - Home Energy Makeover contest
    - process of picking winning homes
    - narrowed down to five in Bend region
    - will be doing Home Performance for 5 homes and pick 1 winner
    - all utilities represented
    - great marketing opportunity for trade allies
  - Continue to check forms and resources page for must up to date collateral for program
  - Training opportunities:
    - Continue to check training calendar and can register online
  - Email address: [hestradeally@csggrp.com](mailto:hestradeally@csggrp.com): easy way to connect with trade ally staff
- Kevin Tippet: Multifamily
  - MF is 5 or more units on a single site
  - Lots of services for trade allies
  - help with paperwork and free building assessments

- BETC assistance and helps arrange this for participant
- 1 multifamily project fulfills HES program requirements for 5 projects
- willing to help train on multifamily
- lots of contractors adding this component

-Tom: general trade ally updates

- website will be redesigned this fall
- Insider: primary news source for trade allies for all programs
  - don't want to send out multiple letters
  - check spam filters in case it goes there
  - check right side bar for program specific
- Cleaning up trade ally list:
  - making website as accurate as possible for customers
- reworking many marketing pieces: please provide input on what works best for customers
  - brochures work better compared to single sheets:
  - for shows: nice cardstock incentives with incentives spelled out more clearly
    - shows less technical information
- energytaxincentives.org: state and federal tax incentives

-Kacia Brockman: Solar Updates

- Roundtables: good networking opportunities to connect solar and energy efficiency
- Encourage trade allies to go deeper and go one step beyond to reduce energy consumption
- Insider: emphasis again- main quick and easy way to get information
- Doug Bowland- new Commercial Solar Manager
  - consultant since 2003 with Energy Trust
  - strong technical knowledge
- Renewal process: clean up the list
- program guide and system requirements updates
- New Solar Energy Review: working across the state to help customers take the next step

-Diana Fischetti: New Buildings Program

- Net zero pilot: address new buildings going towards path of net zero
  - striving for goal
  - First stage rolled out in May for early design assistance grant
    - 4 other incentive components and rolled out throughout the year
- Earth Advantage Small Commercial buildings program pilot:
  - gap in services provided
  - help gain this certification and link will be provided by incentives
  - prescriptive certification process
- Trainings:
  - AIA training in Portland in June

- Path to net zero overview in November
- Trade Ally training webinar- Diane can also do this in person the Bend area
- Pencil it out tool: allow you to put in all information about program costs
  - change assumptions and then can get information about payback
  - can show a few different options
- Kurt Gardner with Earth Advantage: New homes updates
  - Thermal Bypass Checklist training:
    - new program that takes into account air barrier and thermal barrier
    - Checklist to go down when completing project
    - trainings coming up
    - September 1<sup>st</sup>: new homes will be required to go through this checklist for Energy Star purposes
      - permitted for September 1<sup>st</sup> on
      - work with contractors to make you successful so you understand this
  - Sustainable home professional course: great program
    - scholarship available
    - More technical information
  - Smart Design concepts: for architectures and designers
- Dan: Green Street Loan Program
  - take away up front initial hurdle for customer
  - Residential options: home equity and unsecured loan
  - Umpqua Bank here in Bend
    - Diane Harrild is the business relationship manager in this area
      - [-dianeharrild@umpquabank.com](mailto:dianeharrild@umpquabank.com)
  - Small business loans available as well: Multifamily included within this
  - Must be a trade ally and separates you from the competition to use this specific loan options
    - special offer with collaboration from Energy Trust
- Break out sessions