2009 Energy Trust Trade Ally Survey

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1. Executive Summary

This report summarizes the results of the 2009 Energy Trust of Oregon Trade Ally Survey. Originally conceived as a feedback tool for the Communications department about various offerings for trade allies it has since expanded. Now in its fifth year, the survey is still focused on feedback but now includes a program/measure specific market research component. The rationale for collecting self-reported data from the trade allies about their specific markets is two-fold. First, any change in the proportion of various efficient technologies that are being installed by trade allies can be analyzed. Second, the Trade Ally survey can be compared to evaluations and program reports to corroborate the results.

The 2009[1] Trade Ally Survey was sent via email to 971 trade allies when it was launched on February 2, 2009, with a reminder email sent on March 2, 2009. Trade allies were also contacted via mail, postcards being sent to 1,016 trade allies that same week. The survey was closed March 5, 2009 with 110 complete surveys, yielding a response rate of 11%.

1.1 Key Findings & Recommendations

General Trade Ally Findings

Of the 110 respondents, 78 reported themselves as mainly working in the Residential program, 17 in the Commercial, 8 in Solar PV and Solar Thermal, 1 in Industrial, and 1 in Small/Community Wind. Five respondents categorized themselves as 'Other', and included two firms specializing in windows, one in siding, and one realtor.

	Count
Residential	78
Commercial	17
Solar	8
Industrial	1
Small/Community Wind	1
Other	5
Total	*110*

As there was only one respondent for both the Industrial and Small/Community Wind programs, their responses are classified with the five 'Other' respondents' throughout this analysis. The Residential, Commercial, and Solar programs are analyzed separately.

Specific measures reported on, with the number of respondents in parentheses are:

Commercial
- Lighting (8)

Residential
- Gas Furnace (19)
- Heat Pump (8)

[1] To clarify confusion with the nomenclature, the '2009 report covers the 2008 program year.

- Insulation (15)
- Duct Sealing/Insulation (8)
- Windows (6)

Solar
- Solar PV (6)
- Solar Water Heating (3)

General program demographics & ODOE tax credits
Sixty percent of trade allies indicated that they have been working with Energy Trust for more than three years, 25% for less than one year. One quarter of respondents received the majority of their revenue from projects involving Energy Trust incentives, and 58% of respondents intend to increase the proportion of projects that involve Energy Trust in 2009.

A relatively large proportion of responding trade allies continue to be unaware or inactive in their use of Oregon Department of Energy tax credits; 20% were unfamiliar with them, while another 29% were familiar with, but not actively using them.

Recommendation
- As these tax credits are a significant source of incentives for energy efficiency, it is recommended that Energy Trust continue to increase training for contractors on the use of energy tax credits. In addition, Energy Trust should move towards synchronizing Energy Trust incentive forms with tax credit applications.

Marketing
Trade allies were asked to rate their interest in various marketing related initiatives on a scale of 1 to 5; 1 indicated 'no interest' while 5 indicated 'very interested'. The following figures represent the percentage of trade allies who responded that they were 'interested' (4) or 'very interested' (5) in various Energy Trust offerings.

- Cooperative advertising support……………………………….74%
- Scholarships to energy conferences or workshops………….59%
- Publicizing a Trade Ally of the month in the newsletter... …..35%

Recommendation
- In response to strong levels of interest in cooperative advertising, it is recommended that Energy Trust examine the extent and structure with which this service is currently provided. Currently, more active trade allies receive a progressively larger share of such advertising.

Networking
Eighty-eight percent of respondents indicated that they were 'interested' or 'very interested' in networking with other trade allies. When asked what specific trades they were interested in working with, the most frequent responses were 'Residential HVAC' and 'Real Estate Professionals'.

Recommendation
- Methods for facilitating networking and collaboration between trade allies should be explored with both Energy Trust staff and the trade allies themselves, as it is important to find an effective means that best provides this support. Respondents provided names of organizations that they frequently use to network; Energy Trust should consider increasing networking efforts with these groups.

Training

Seventy-two percent of responding trade allies reported that they had attended an Energy Trust sponsored training session in 2008; 70% of these trade allies found the trainings ‘valuable’ or ‘very valuable’. When asked what specific areas they would most like to be trained in, the most common responses were ‘ODOE tax credits’ and ‘savings calculation tools’.

Recommendation

- Training on energy tax credits should be increased, and can potentially be expanded to incorporate the use of federal incentives.
- Training on Energy Trust programs and processes should be increased, as familiarity with Energy Trust and Energy Trust staff was reported to be an important element in improving the organization’s relationship with trade allies.

Roundtable Discussions

Almost half of respondents indicated that they had attended a roundtable discussion in the past; half of whom reported that the events were either ‘useful’ or ‘very useful’. As in previous years, the location of the roundtable discussions are an important issue that create a major barrier to trade ally attendance.

Recommendation

- It is recommended that Energy Trust review its efforts to expand the location and frequency of roundtable discussions, and to review the responses to these efforts. Where applicable, Energy Trust should continue to hold these events in more diverse geographic locations. It is recommended that telecommuting alternatives be investigated.

Communication & the Insider Newsletter

The majority of responding trade allies prefer to be notified about program updates via email from program staff at least once a month. Although just half of respondents were aware of the Insider Newsletter, one quarter of respondents identified the publication as one of the most preferable means of communication.

Recommendation

- As half of respondents were unaware of the Insider Newsletter, Energy Trust should renew its effort to increase awareness and use of the publication. The Insider should be distributed to all trade allies if it is not presently being done.
- The Insider can be used to increase communication and understanding between Energy Trust and trade allies. Tailoring communications so that the program updates and information provided is of interest to specific trade allies is recommended.

Website

The Energy Trust website continues to be used more and more frequently by responding trade allies. The majority of respondents found the trade ally web pages to be ‘useful’ or ‘very useful’, although the pages for program forms and program incentives continue to be those most frequently visited.

Recommendation

- In response to trade ally comments, the request for interactive forms and online submittals should continue to be accommodated. As this effort moves forward, Energy Trust should work towards synchronizing Energy Trust and energy tax credit paperwork.

Energy Efficiency Program Satisfaction

Although overall satisfaction levels of respondents decreased somewhat from the 2008 survey, the majority or respondents continue to report being 'satisfied' or 'very satisfied' in all categories. One third of respondents primarily working with energy efficiency indicated that their relationship with Energy Trust had improved over the last year, while half reported that their relationship had stayed the same.

Percent expressing 'Satisfied' or 'Very satisfied' responses for:

- Overall satisfaction……………………………………………........67%
- Incentive payment processing time…………………………….57%
- Turnaround time for incentive application/approval of paperwork……...61%
- Interaction with Energy Trust staff……………………………....69%
- Response times to requests for information……………………66%
- Response times to requests for assistance on forms…………65%

Renewable Program Satisfaction

Satisfaction levels of renewables respondents generally decreased somewhat from the 2008 survey. Despite this, responding trade allies expressed overall high levels of satisfaction with the Renewables Program. Half of responding renewables trade allies indicated that their relationship with Energy Trust had improved over the last year, the other half reporting that the relationship had stayed the same.

Percent expressing 'Satisfied' or 'Very satisfied' responses for:

- Overall satisfaction……………………………………………........63%
- Incentive payment processing time…………………………….72%
- Turnaround time for incentive application/approval of paperwork……...72%
- Interaction with Energy Trust staff……………………………....75%
- Response times to requests for information……………………51%
- Response times to requests for assistance on forms…………66%
- Quality of Energy Trust inspections……………………………..…71%
- Quality of your relationship with Energy Trust inspectors…….71%

Financing and Green Street Lending

Forty percent of this year's respondents indicated that they offer no financing to their customers at all. Over half of responding trade allies that were aware, but not actively offering, financing through the Green Street Lending program expressed interest in offering the program to their customers in the future.

Recommendation

- Trade allies should be offered training in the details and participation process of the program. In addition, it should be made increasingly aware that the Green Street Lending program is not solely for residential customers, but commercial as well.
- Future surveys should probe deeper into the reasons why trade allies do not offer financing to their customers; this knowledge can be used to better craft viable financing solutions for trade allies and their customers.

Residential Trade Ally Findings

The most common primary equipment installed by responding residential trade allies were gas furnaces. This was followed by insulation, heat pumps, duct sealing/insulation, and window installations.

Gas furnace installations in existing homes

- 95% or more efficient – 33%

- 90%-94% efficient – 28%
- 80%-89% efficient – 39%

Heat pump installations

- HSPF 9.5 or better – 9%
- HSPF 9.0-9.4– 27%
- HSPF 8.5-8.9– 24%
- HSPF 8.2-8.4 – 19%
- HSPF code – 19%

Window installations

- 0.26 U value or less – 1%
- 0.26-0.30 U value –78%
- 0.31-0.32 U value – 15%
- 0.33-0.34 U value 4 – 4%
- 0.35 U value – 3%

Insulation

Responding residential trade allies that primarily install insulation felt that the majority of existing homes could still use more insulation; 74-90% of which could be done economically. One fifth of these respondents indicated that they did not perform air sealing on any of their 2008 insulation jobs.

Duct Sealing/Insulation

The vast majority of duct sealing/insulation done by responding trade allies in 2008 was on existing homes, two thirds of which were gas heated. Half of these trade allies that primarily perform duct sealing performed duct insulation on 50% of their jobs or more.

Recommendations

- It is recommended that further research look into the interaction between duct sealing, duct insulation, and air sealing, to look at the effect that this interaction may have on energy savings.
- As the changes in incentives for gas furnaces, heat pumps, and duct sealing/insulation have changed, it is recommended that future research examine the effects that these changes have on market share of energy efficiency technology.

Commercial Trade Ally Findings

As with last year, lighting equipment was the most common primary measure installed by responding commercial trade allies (9 of 17).

Commercial lighting technology installations

Percent of fixtures installed:

- T5 – 45%
- Premium T8 – 32%
- T8 – 21%
- T12 – 2%

Recommendation

- A small percentage of 2008 commercial lighting projects done by responding trade allies used lighting controls other than occupancy sensors. It is recommended that Energy Trust move towards emphasizing more advanced, efficient lighting control technology.

Solar Trade Ally Findings

Of the eight respondents that primarily worked with the solar program six installed solar PV projects and three installed solar water heating projects in 2008. The majority of these allies have been trade allies for more than five years and plan to increase the number of projects that involve Energy Trust incentives in 2009.

2. Introduction

2.1 Background

This report summarizes the results of the 2009 Energy Trust of Oregon Trade Ally Survey. Originally conceived as a feedback tool for the communication department about various offerings for trade allies it has since expanded. Now in its fifth year, the survey is still focused on feedback but now includes a program/measure specific market research component. The rationale for collecting self-reported data from the trade allies about their specific markets is two-fold. First, any change in the proportion of various efficient technologies that are being installed by trade allies can be analyzed. Second, the Trade Ally Survey can be compared to evaluations and program reports to corroborate the results.

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Respondent Representation

Survey respondents accounted for approximately 5% of total incentives paid for energy saving measures in 2008. Projects done by these trade allies accounted for less than 1% of 2008 electrical savings and approximately 9% of 2008 gas savings.

2.2 Evaluation Approach

Objectives
This survey was designed to accomplish the following objectives:

- Collect feedback about communication and training needs of Energy Trust's trade allies
- Collect feedback about trade ally satisfaction with Energy Trust and Project Management Contractor staff
- Obtain data from contractors about the state of the markets they work in
- Assess the demographics of trade allies

To address these objectives the survey focused on the following areas:

- **Participation** – Program areas trade allies were affiliated with in 2008 and primary measures installed.

- **Demographics** – Length of time as an Energy Trust trade ally, percent of revenue derived participation in Energy Trust programs, and size of firm.

- **Market summaries –** Efficiency level of products installed.

- **Staff interaction feedback –** Satisfaction with inquiries made to program staff.

- **Marketing** – Types of marketing efforts in which trade allies are most interested.

- **Networking** – Types of networking activities in which trade allies are most interested.

- **Rewards** – Types of rewards in which trade allies are most interested.

- **Training** – Types of training that are most helpful to trade allies.

- **Insider Newsletter Feedback** – Usefulness of content and suggestions for improvement.

- **Energy Trust Website** – Easy of navigation and usefulness of information.

Methodology
Exploration of the aforementioned objectives was carried out through an internet survey instrument. Questions covered both general demographics of all trade allies as well as specific questions catering to each program area (i.e. Commercial, Residential, etc.).

On February 2, 2009, 971 trade allies were sent an announcement via email requesting their participation. A link to the survey was embedded in the email announcement. Trade allies were also contacted via mail, postcards being sent to 1,016 trade allies that same week. A reminder email was sent out to trade allies on March 2, 2009, five days before the survey closed. As an incentive to participate, respondents were entered into a random drawing for two $100 gift certificates.

3. General Trade Ally Findings

This section presents general findings from trade allies involved in Energy Trust programs. In addition to general demographic information, this survey was designed to explore issues specific to trade allies working in different Energy Trust programs. For each group, we provide a summary of the following:

- Trade ally firm demographics
- Familiarity with state energy efficiency tax credits
- Interest in Energy Trust marketing, networking, and training initiatives
- Feedback on Energy Trust communication, Energy Trust publications, and Energy Trust events

Trade Ally Demographics

There were a total of 110 respondents to the 2009 Trade Ally Survey. Of these respondents, 78 identified themselves as working primarily with residential programs, 17 with commercial programs, 8 with solar, 1 with industrial, 1 with small/community wind, and 5 with 'other' programs. The one industrial ally and one small/community wind ally are included with the 'other' respondents throughout this report.

The degree of survey completion by each respondent varied widely, as some trade allies answered all relevant questions, while some answered only the general questions at the beginning of the survey. For this reason, the number of trade allies responding is reported where applicable.

Median firm size in Oregon (number of employees)

Residential	Commercial	Solar
8	7	2

Residential trade allies had the highest median number of employees in Oregon. The reported median number of employees for commercial and solar trade allies decreased compared to the 2008 survey, from 9 and 4, respectively.

Just 83 of the respondents reported national employment figures. There was no significant difference between the state and national firm size of trade allies.

Length of time as a trade ally

	Residential	Commercial	Solar	Other	Total
Count	78	17	8	7	110
Less than 1 year	22%	18%	38%	57%	25%
1-2 years	13%	35%	0%	29%	16%
3-4 years	31%	18%	0%	0%	25%
More than 5 years	35%	29%	63%	14%	35%
Don't know	0%	0%	0%	0%	0%

The 2009 Trade Ally survey respondents included a relatively large portion of new trade allies (less than 1 year) when compared to previous years; last year only 2% of respondents were new allies, up to 25% this year. A large portion of all respondents, 60%, have been working with Energy Trust for more than 3 years.

All of the solar trade allies that responded indicated that they have either been trade allies for more than 5 years or that they are new trade allies.

Percent of 2008 revenue from projects receiving Energy Trust incentives

	Residential	Commercial	Solar	Other	Total
Count	74	16	8	2	100
0%	11%	6%	25%	0%	11%
1%-24%	32%	67%	25%	100%	39%
25%-49%	28%	19%	0%	0%	24%
50%-74%	15%	0%	25%	0%	13%
75%-100%	14%	6%	25%	0%	13%

Compared to prior program years, responding trade allies indicated decreased percentages of revenue coming from projects receiving Energy Trust incentives. This shift was due to both an increase in the percentage of firms indicating that none of their revenue came from Energy Trust incented projects (from 1% in 2007 to 11% in 2008) and a decrease in the percentage of firms indicating that the majority of their revenue comes from Energy Trust projects (from 36% in 2007 to 26% in 2008).

As with last year, solar allies indicated the highest level of reliance on projects involving Energy Trust incentives.

Percent of revenue from projects involving Energy Trust incentives by firm size

	Residential		Commercial		Solar		Total	
	Large	Small	Large	Small	Large	Small	Large	Small
0%	8%	15%	13%	0%	0%	67%	8%	16%
1%-24%	32%	29%	75%	63%	20%	33%	40%	36%
25%-49%	32%	27%	13%	25%	0%	0%	25%	24%
50%-74%	11%	18%	0%	0%	40%	0%	11%	13%
75%-100%	18%	9%	0%	13%	40%	0%	17%	9%
Don't know	0%	3%	0%	0%	0%	0%	0%	2%

When compared by firm size (larger or smaller than median firm size of the respective program), larger firms unexpectedly tend to have a higher percentage of revenue generated by Energy Trust related projects. This may be due to some economies of scale; the more projects done by a firm does that qualify for Energy Trust incentives, the more beneficial and cost effective it becomes to be proficient in working with Energy Trust and completing the relevant processes and paperwork.

Larger solar allies rely much more heavily on Energy Trust projects than do the smaller solar allies. Commercial trade allies show the opposite, as smaller allies rely more heavily on projects involving Energy Trust.

Anticipated change in projects involving Energy Trust in 2009

	Residential	Commercial	Solar	Other	Total
Count	78	17	8	2	110
Expect to increase proportion	47%	94%	63%	100%	58%
Don't project a change	35%	6%	38%	0%	29%
Expect to decrease proportion	18%	0%	0%	0%	13%

When asked if they expected to increase or decrease their participation with Energy Trust in 2009, trade allies responded quite similarly to previous years. The majority of allies, 58%, indicated that they expected to increase their involvement with Energy Trust.

A noticeable change in this year's responses is in the distribution of allies that indicated expectations of declining participation with Energy Trust. No commercial, industrial, or solar allies expect to decrease their involvement with Energy Trust, compared to the respective 2008 responses of 7%, 33%, and 11%. However, 18% of residential trade allies are expecting to decrease their involvement with Energy Trust, compared to just 4% last year. The following table shows the main equipment installed by those residential allies who expect to decrease the proportion of future projects that involve Energy Trust.

Primary equipment installed by trade allies decreasing Energy Trust participation

Primary Equipment Installed	Count
Gas Furnace	6
Heat Pump	4
Duct Sealing and Duct Insulation	3
Insulation	1
TOTAL	*14*

Except in regards to insulation, incentives for all of these technologies are planned to decrease for residential customers as of May 1, 2009. In the case of gas furnaces the incentives for most residential customers are ending.

Influence of Energy Trust incentives in moving projects forward in 2008

	Residential	Commercial	Solar	Other	Total
	78	17	8	2	105
Not at all influential	3%	0%	25%	0%	4%
Not very influential	19%	18%	0%	0%	17%
Influential	33%	29%	25%	0%	31%
Very influential	42%	53%	38%	100%	45%
Don't know	3%	0%	13%	0%	3%

When asked about the level of influence that Energy Trust incentives had on the completion of projects, respondents indicated that the incentives continue to be a strong influence. Compared to previous years, this is increasingly so for residential projects. Although trade allies may be overestimating the influence that Energy Trust incentives have on their customers, the fact that contractors view the incentives as being important indicates that they will continue to offer energy efficient technologies.

Two solar trade allies indicated that Energy Trust incentives were not at all influential in the completion of projects; this is not surprising considering that two solar trade allies did not use Energy Trust incentives in any of their 2008 projects.

Top three things that move customers to carry out projects (besides incentives)

	Residential	Commercial	Solar	Other	Total
	78	17	8	2	105
Energy savings	96%	82%	100%	100%	94%
Tax Credits	54%	53%	100%	100%	58%
Comfort	50%	0%	13%	0%	38%
Environmental	37%	18%	75%	0%	37%
The bottom line	28%	76%	25%	50%	37%

As in previous years, energy savings are viewed as being the primary motivation for customers undertaking energy efficiency/renewable energy projects. In response to frequent write-ins in 2008, this year's survey included 'tax credits' as a potential motivator, and was the second most common motivational factor. As with last year, comfort, the environment, and the bottom line are among the top motivators.

Respondents were allowed to write in another factor that moved customers to carry out projects. Just 8 responses were collected; they included financing, cash incentives, functionality, and US grants.

See Appendix B, Question 5, for specific responses.

Demographics Summary and Recommendations

The majority of responding trade allies have been a trade ally for more than 3 years, and more than half of all respondents intend to increase their participation with Energy Trust in 2009. Most respondents indicated that Energy Trust incentives were influential in moving projects forward in 2008.

Energy Trust should continue to craft marketing and promotional messages around the energy savings that can be obtained, as responding trade allies perceive this as the primary motivator (besides incentives) for energy efficiency measures. For residential customers, this emphasis on saving energy should be complemented with messages of the environmental and comfort benefits of energy efficiency. Marketing towards the commercial sector should emphasize both the cost and energy savings achievable through energy efficiency projects.

Familiarity and use of ODOE Tax Credits

The Oregon Department of Energy offers tax credits for residential and commercial projects that help Oregonians save energy. They have also provided a pass-through option to enable those who do not have a tax liability to transfer the credit to another individual or entity that does.

Many projects that qualify for Energy Trust incentives also qualify for either the Residential Energy Tax Credit (RETC) or Business Energy Tax Credit (BETC). These additional incentives can make the difference in a customer's ability to afford a project, so it is important that trade allies are familiar with the credits and promote them.

Familiarity with ODOE tax credits

	Residential	Commercial	Solar	Other	Total
Count	77	17	8	7	109
Not familiar with BETC or RETC	21%	18%	0%	43%	20%
Familiar with BETC or RETC	31%	24%	38%	14%	29%
Occasionally use BETC or RETC	12%	6%	12%	14%	11%
Regularly use BETC or RETC	27%	47%	38%	14%	30%
Don't Know	9%	6%	12%	14%	9%

This year's questions concerning familiarity with ODOE tax credits focused more strongly on their use. There is still a relatively large percentage of responding residential and commercial trade allies, 21% and 18% respectively, that are unfamiliar with ODOE tax credits. Of the 41% of trade allies that use BETC or RETC, 30% do so regularly.

Frequency of completing customer's tax credits forms

	Residential	Commercial	Solar	Other	Total
Count	30	9	4	2	45
0%	10%	33%	0%	0%	13%
1-24%	3%	0%	0%	50%	4%
25-49%	0%	0%	25%	0%	2%
50-74%	10%	11%	0%	0%	9%
75-100%	70%	56%	75%	50%	67%
Don't know	7%	0%	0%	0%	4%

Trade allies that 'regularly' or 'occasionally' use Oregon energy tax credits were asked how frequently they fill out the tax credit forms for their customers. Two thirds reported that they fill out the tax credit forms somewhere between 75-100% of the time.

Tax Credits Summary and Recommendations

There continues to be a relatively large proportion of responding trade allies that are not familiar with, or do not regularly use the state energy tax credits. As these tax credits are a significant source of incentives for energy efficiency, it is recommended that Energy Trust continue to increase training for contractors on the use of energy tax credits, both state and federal.

In addition, Energy Trust should move towards synchronizing Energy Trust incentive forms with tax credit applications. Simplifying the paperwork and the process will help contractors serve their customers and help sell energy efficiency technology. If the tax credit application process can be undertaken by contractors who are familiar and proficient with their use, customers are much more likely to tap into this resource.

Future surveys should focus less on awareness and use of energy tax credits and more on how Energy Trust can assist trade allies in their use of them. This should include probing deeper into what forms and sources of energy tax credit training would prove to be most useful to trade allies.

Marketing

Trade allies were asked what types of marketing assistance would be most helpful to them and were asked to respond on a 5 point scale, with 1 being ‘not at all interested’ and 5 being ‘very interested’.

Overall interest expressed for various marketing offerings:

- Cooperative advertising support……………………………….74%
- Scholarships to energy conferences or workshops………….59%
- Publicizing a Trade Ally of the month in the newsletter... …..35%

Cooperative Advertising Support

	Residential	Commercial	Solar	Other	Total
Count	75	15	7	2	99
Not at all interested	4%	27%	14%	0%	8%
2	5%	7%	0%	0%	5%
3	12%	20%	14%	0%	13%
4	16%	20%	14%	0%	16%
Very interested	63%	27%	57%	100%	58%

Interest in cooperative advertising support from Energy Trust (Energy Trust co-brands on your ads and pays a portion of the cost) grew to 74% from the 54% of allies that expressed interest in the 2008 survey. This increased interest was most notable in the residential and solar trade allies, who indicated that 79% and 71% were interested (or ‘very interested’), respectively.

Due to the strong interest in cooperative advertising support, is recommended that Energy Trust examine the requirements and availability of the service. Currently, more active trade allies receive progressively more use of such advertising resources than the relatively inactive and non-active allies.

Cooperative advertising support, by firm size

	Residential		Commercial		Solar		Other		Total	
	Large	**Small**	**Large**	**Small**	**Large**	**Small**	**Large**	**Small**	**Large**	**Small**
Count	36	34	9	6	5	2	2	0	52	42
Not at all interested	8%	0%	11%	50%	0%	50%	0%	0%	8%	10%
2	8%	3%	0%	17%	0%	0%	0%	0%	6%	5%
3	6%	18%	33%	0%	20%	0%	0%	0%	12%	14%
4	11%	21%	33%	0%	20%	0%	0%	0%	15%	17%
Very interested	67%	59%	22%	33%	60%	50%	100%	0%	60%	55%

When large and small firms are compared, there is a similar distribution of interest in cooperative advertising between the two firm sizes. Larger commercial trade allies expressed significantly more interest than small commercial allies

Scholarships to energy conferences or workshops

	Residential	Commercial	Solar	Other	Total
Count	75	15	7	2	99
Not at all interested	13%	20%	0%	0%	13%
2	8%	20%	14%	0%	10%
3	17%	13%	14%	50%	17%
4	17%	27%	14%	0%	18%
Very interested	44%	20%	57%	50%	41%

Of the 99 respondents, 59% expressed some degree of interest in receiving scholarships to energy conferences or workshops. Solar allies expressed the strongest interest; 57% indicating that they were 'very interested' and 14% indicating they were 'interested'. Residential allies also expressed relatively high levels of interest in scholarships, 61% of whom expressed some degree of interest.

Publicizing a Trade Ally of the Month in the newsletter

	Residential	Commercial	Solar	Other	Total
Count	75	14	7	2	98
Not at all interested	28%	7%	29%	0%	24%
2	13%	7%	29%	50%	14%
3	23%	43%	29%	0%	26%
4	17%	29%	0%	0%	17%
Very interested	19%	14%	14%	50%	18%

Publicizing a 'Trade Ally of the Month' received the least interest from respondents. While 35% indicated some degree of interest in the idea, 38% expressed disinterest, and 26% expressed ambivalence. Solar and residential respondents indicated the least amount of interest in this idea.

Suggestions for Energy Trust Marketing and Assistance

Respondents were provided with an open comment box for suggestions for Energy Trust marketing and assistance. Forty three responses were collected; reoccurring responses included:

- Increased Energy Trust presence outside of the Portland Metro area
- Compensation for consultations/site evaluations
- Continued and increased publicity/advertising of both Energy Trust and Trade Allies
- Compensation for outside training

See Appendix B, Question 182, for specific responses.

Trade Ally Networking Channels

Trade Allies were asked about specific professional associations and organizations used for networking and information. The most frequently cited organizations are listed in the following tables, categorized by trade ally program.

Residential

Organization/Association	Count
Home Builders Associations	6
Oregon Remodelers Association	5
Chambers of Commerce	4
Oregon Chapter of the Air Conditioning Contractors of America (ORACCA)	4
Earth Advantage	3
Oregon Solar Energy Industries Association	3

Commercial

Organization/Association	Count
Oregon APEM (Association of Professional Energy Managers)	1
National Electrical Contractors Association (NECA) –Oregon Pacific Cascade Chapter	1
American Society of Heating, Refrigerating and Air-Conditioning Engineers (ASHRAE)	1
Associated General Contractors (AGC) – Oregon Columbia Chapter	1
Solarworld classes	1
MPNCDA	1
OADA	1

Industrial

Organization/Association	Count
American Society of Plumbing Engineers (ASPE)	1
Association of Facility Engineers (AFE)	1
Northwest Energy Efficiency Alliance (NEEA)	1
Northwest Food Processors Association (NWFPA)	1

Small/Community Wind

Organization/Association	Count
North Santiam Chamber of Commerce	1
United States Department of Agriculture (USDA)	1

Solar

Organization/Association	Count
Oregon Solar Energy Industries Association (OSEIA)	3
Solar Oregon	2
Solar Energy International	1
American Solar Energy Society (ASES)	1
International Brotherhood of Electrical Workers (IBEW)	1
North American Board of Certified Energy Practitioners (NABCEP)	1

Marketing Summary and Recommendations

It is recommended that Energy Trust look into providing incentives for consultations and site evaluations, and to carefully consider how those incentives might be structured. One possibility is to provide incentives only for evaluations that lead to action and energy savings.

In response to strong levels of interest in cooperative advertising, it is recommended that Energy Trust continue to examine the extent and structure with which this service is currently provided. Currently, more active trade allies receive a progressively larger share of such advertising resources than the relatively inactive and non-active allies. Future surveys should ask about this structure to provide insight into its effectiveness.

Responding trade allies identified a list of organizations that they use for networking. It is recommended that Energy Trust use this list to increase networking capabilities and overall awareness of Energy Trust. Where appropriate, Energy Trust should distribute press releases and program information to these organizations.

Networking

Trade allies were asked to rate their interest in networking with other Energy Trust trade allies. Those respondents that indicated that they were somewhat or very interested in networking opportunities were then asked what specific trades they are interested in working with.

Interest in networking with other trade allies

	Residential	Commercial	Solar	Other	Total
Count	77	15	7	2	101
Not at all interested	5%	0%	0%	0%	4%
Not very interested	16%	13%	0%	0%	14%
Somewhat interested	46%	67%	57%	50%	50%
Very interested	34%	20%	43%	50%	33%

The large majority of responding trade allies, 83%, expressed interest in networking with other Energy Trust trade allies. Solar allies expressed the most interest as residential allies expressed the least interest. Those respondents that indicated that they were ‘somewhat’ or ‘very’ interested were then asked which trades they would like to network with.

The interest in networking with trade allies should be pursued, especially in areas such as the Home Performance with Energy Star program in which some contractors are unable to provide all of the services involved in the project. In such areas networking and collaboration is a must, and should be enhanced and supported by Energy Trust.

Interest in networking with other trade allies by firm size

	Residential		Commercial		Solar		Other		Total	
	Large	Small	Large	Small	Large	Small	Large	Small	Large	Small
Count	37	35	9	6	5	2	2	0	53	43
Not at all interested	3%	9%	0%	0%	0%	0%	0%	0%	2%	7%
Not very interested	22%	9%	11%	17%	0%	0%	0%	0%	17%	9%
Somewhat interested	41%	49%	78%	50%	60%	50%	50%	0%	49%	49%
Very interested	35%	34%	11%	33%	40%	50%	50%	0%	32%	35%

Comparing interest in networking between firm sizes reveals that the distribution of interest for small firms closely resembles that of large firms, with the exception that small firms tended to show interest to a slightly stronger degree.

Most frequently cited trades that allies would like to network with*

	Residential	Commercial	Solar	Other	Total
Count	61	13	7	2	83
Residential HVAC	54%	16%	29%	50%	48%
Real estate professionals	46%	15%	86%	50%	47%
Residential insulation	51%	0%	43%	0%	43%
Residential duct sealing and duct insulation	44%	0%	29%	50%	39%
Solar electric	31%	39%	57%	0%	35%
Residential windows	39%	0%	29%	0%	33%
Solar water heating	23%	15%	43%	0%	31%
New site-built home	21%	31%	57%	0%	28%
Wind energy	20%	15%	71%	0%	24%

*See Appendix B for a complete table of all trades asked about

Those trade allies indicating that they were either ‘somewhat’ or ‘very’ interested in networking with other trade allies were asked what specific trades they would like to network with. The most frequently chosen trades were residential HVAC, real estate professionals, residential insulation, residential duct sealing and duct insulation, and solar electric.

Respondents were provided with an open box to write in ‘other’ program areas. Fourteen responses were collected. Representative responses include:

- Suppliers
- Ground source heat pumps
- Marketing professionals
- Swimming pool

See Appendix B, Question 185, for specific responses.

Networking Summary and Recommendations

The interest in networking with trade allies should be pursued. This is most critical in areas such as the Home Performance with Energy Star program where some contractors are unable to provide all of the services involved in the project. In such areas networking and collaboration are a must, and should be enhanced and supported by Energy Trust.

Methods for facilitating networking and collaboration between trade allies should be explored with both Energy Trust staff and the trade allies themselves, as it is important to find an effective means that best provides this support. The list of networking channels identified by responding trade allies may prove a valuable tool. Where applicable, Energy Trust programs should use this information to expand networking efforts and capabilities.

Training

Trade allies were asked about their past participation in Energy Trust training opportunities, their experiences with the trainings, and future topics that would interest them.

Attended a training session prior to 2008

	Residential	Commercial	Industrial	Solar	Total
Count	70	14	1	7	92
Yes	64%	50%	100%	86%	64%
No	36%	50%	0%	14%	36%

Two thirds of responding trade allies reported that they attended an Energy Trust training session prior to 2008. This is consistent with the previous year's findings on attendance to training opportunities.

Usefulness of trainings prior to 2008

	Residential	Commercial	Industrial	Solar	Total
Count	45	7	1	6	59
Not at all valuable	7%	0%	0%	0%	5%
2	4%	0%	0%	17%	5%
3	33%	0%	0%	17%	27%
4	20%	71%	100%	50%	31%
Very valuable	36%	29%	0%	17%	32%

The majority of responding trade allies that attended an Energy Trust training session in previous years (63%) found the training to be 'valuable' or 'very valuable'. A noticeable improvement over last year was that 100% of commercial trade allies indicated a high level of value of the trainings, compared to just 50% last year.

Usefulness of trainings prior to 2008 by firm size

	Residential		Commercial		Industrial		Solar		Total	
	Large	Small	Large	Small	Large	Small	Large	Small	Large	Small
Count	24	17	3	4	1	0	5	1	33	22
Not at all valuable	8%	0%	0%	0%	0%	0%	0%	0%	6%	0%
2	8%	0%	0%	0%	0%	0%	0%	100%	6%	5%
3	21%	53%	0%	0%	0%	0%	20%	0%	18%	41%
4	25%	18%	66%	75%	100%	0%	60%	0%	36%	27%
Very valuable	38%	29%	33%	25%	0%	0%	20%	0%	33%	27%

When comparing the usefulness of training sessions across firm size, large firms indicated a higher level of value of the sessions than did small firms. This is the opposite of last year's findings that small firms valued the training more than large firms.

Attended a training session in 2008

	Residential	Commercial	Other	Solar	Total
Count	64	13	2	7	86
Yes	77%	62%	100%	71%	72%
No	23%	38%	0%	29%	28%

Almost three quarters of respondents indicated that they had attended a training session in 2008. A higher percentage of trade allies, across all sectors, participated in training sessions last year than in previous years. These are the same results as in the 2008 survey.

Usefulness of trainings in 2008

	Residential	Commercial	Other	Solar	Total
Count	49	8	2	5	64
Not at all valuable	2%	0%	0%	0%	2%
2	6%	0%	0%	0%	5%
3	27%	13%	0%	20%	23%
4	22%	25%	0%	60%	25%
Very valuable	43%	63%	100%	20%	45%

For the third year in a row, trade allies continue to find trainings more useful than in previous years. There was marked improvement in the percentage of trade allies that found the trainings to be 'very valuable', from 22% in 2008 to 45% this year.

Length of time as a trade ally was examined for those 29 indicating that the trainings were 'very valuable', as a relatively large percentage of this years' respondents were new to working with Energy Trust. Surprisingly, the distribution of those allies that found the trainings 'very valuable' was quite even; roughly one third have been an ally for less than 1 year, one third for 1-5 years, and another one third for 5 or more years.

Usefulness of training in 2008 by firm size

	Residential		Commercial		Solar		Other		Total	
	Large	**Small**	**Large**	**Small**	**Large**	**Small**	**Large**	**Small**	**Large**	**Small**
Count	27	18	6	2	4	1	2	0	39	21
Not at all valuable	4%	0%	0%	0%	0%	0%	0%	0%	3%	0%
2	11%	0%	0%	0%	0%	0%	0%	0%	8%	0%
3	22%	33%	17%	0%	25%	0%	0%	0%	21%	29%
4	26%	17%	17%	50%	50%	100%	0%	0%	26%	24%
Very valuable	37%	50%	67%	50%	25%	0%	100%	0%	44%	48%

There is almost no difference in the value placed on 2008 trainings between large and small firms. However, small residential firms found the 2008 trainings to be much more useful than in previous years.

Suggestions for Improving Training Sessions

Survey respondents were provided with an open comment box for suggestions on what Energy Trust could due to improve the value of the training sessions. Thirty eight responses were collected; reoccurring themes included:

- More trainings in Southern Oregon
- Provide online training to help minimize travel costs
- Increase the frequency of trainings
- Reduce the cost
- Provide more advanced notice of trainings

See Appendix B, Question 187, for specific responses.

Suggestions for Specific Types of Training

Respondents were also provided text boxes to enter specific types of technical training they might be interested in. Seventy responses were collected. Reoccurring answers included:

- Solar technologies (PV, hot water, and others)
- Advanced duct sealing
- Advanced air sealing
- HVAC measures
- CheckMe training
- Program and incentive updates

See Appendix B, Question 188, for specific responses.

Program areas allies would like to receive training in

	Residential	Commercial	Solar	Other	Total
Count	78	17	8	2	105
BETC and RETC	35%	53%	38%	50%	38%
Saving calculation tools	33%	24%	38%	50%	32%
Residential HVAC	35%	6%	25%	0%	29%
Air quality and air quality diagnostics	30%	18%	13%	0%	26%
Duct sealing and insulation	32%	6%	13%	0%	26%
Solar electric	18%	29%	38%	0%	22%
Solar water heating	19%	6%	38%	0%	18%
Residential windows	21%	0%	0%	0%	15%
Insulation	18%	0%	13%	0%	14%
Commercial HVAC	17%	12%	0%	0%	14%
Residential lighting	18%	12%	13%	0%	13%
Commercial lighting	4%	24%	25%	0%	9%
Residential new homes	10%	0%	0%	0%	8%

When asked what other program areas trade allies would be interested in receiving training for, the use of Oregon tax credits and the use of savings calculation tools were at the top of the list.

The individual sectors expressed high interest in receiving training in their respective program areas; 38% of solar allies would like training in both solar electric and solar water heating, 35% of residential allies would like training in residential HVAC, and 24% of commercial allies would like to be trained in commercial lighting. There was noticeable cross over between program sectors in three specific areas; 29% of commercial allies would like to be trained in solar electric, and 25% of solar allies would like to be trained in both residential HVAC and commercial lighting.

Respondents were provided with an open box to write in ‘other’ program areas. There were 10 responses, including:

- Federal incentives/rebate programs
- Financing/funding
- Micro hydro
- Advanced air sealing
- Commercial building energy analysis

See Appendix B, Question 189, for specific responses.

Training Summary and Recommendations

Over two thirds of responding trade allies attended a training session in 2008. These trade allies continue to find the trainings increasingly useful, although open ended responses provided mixed feedback on the usefulness of Energy Trust training sessions.

In response to comments regarding increasing the frequency and geographic location of training sessions, it is recommended that Energy Trust consider using webinars as a training alternative. The use of webinars would provide training with the desired traits of flexibility in location, time, and frequency. Energy Trust has been actively expanding the locations of training sessions, and should continue to do so where there is significant demand.

It is recommended that training be increased in two particular areas. The first is general Energy Trust programs and processes. Responses concerning program satisfaction indicate that increased familiarity and knowledge with Energy Trust programs and staff benefit Energy Trust's relationship with trade allies.

Second, training on energy tax credits should be increased, and can potentially be expanded to incorporate the use of federal incentives. This training should include step by step details on the paperwork and complete process of receiving the tax credits, as these programs provide large savings for our contractors and customers. Energy Trust should move towards synchronizing paperwork between the Energy Trust and energy tax credit programs.

Roundtable Discussions

Trade allies who attended a trade ally roundtable discussion were asked to report how useful they found the event. Suggestions for improvements were also solicited.

Attendance at a trade ally Roundtable Discussion

	Residential	Commercial	Other	Solar	Total
Count	76	15	2	7	100
Yes	49%	27%	50%	57%	46%
No	46%	67%	50%	43%	49%
Don't know	5%	7%	0%	0%	5%

While just 46% of respondents have attended a roundtable discussion, this is a marked increase over the 32% who indicated they had done so in the 2008 survey. This year, residential respondents were more likely, and commercial allies were less likely to have attended a roundtable than they were in previous years. Solar allies continue to have the highest attendance rates.

Most recent Roundtable Discussion Attended

	Residential	Commercial	Other	Solar	Total
Count	35	4	1	4	44
1 month ago or less	20%	0%	0%	25%	18%
1-3 months ago	29%	50%	0%	0%	27%
3-6 months ago	29%	25%	0%	0%	25%
6-12 months ago	14%	20%	0%	25%	14%
More than 1 year ago	6%	25%	100%	50%	14%
Don't know	3%	0%	0%	0%	2%

Of responding trade allies who have attended a roundtable discussion, 84% have attended within the last year, and 70% within the last six months.

Usefulness of Roundtable Discussions

	Residential	Commercial	Other	Solar	Total
Count	35	4	1	4	44
Not at all useful	9%	0%	0%	25%	9%
2	11%	25%	0%	25%	14%
3	29%	25%	0%	25%	27%
4	40%	0%	0%	25%	34%
Very useful	11%	50%	100%	0%	16%

When asked about the usefulness of roundtable discussions, 50% of respondents who had attended indicated that they were 'useful' or 'very useful', a marked improvement over the 38% who thought so last year. Responses from solar trade allies reveal that the roundtable discussions are least valuable to solar allies.

Suggestions for Future Roundtable Topics
Trade allies were also asked for suggestions for topics to be covered at future roundtables. Forty three responses were collected. Reoccurring themes included:

- Updates on incentives and policies
- Introducing new programs
- Opportunities and needs for training
- Success stories and challenges
- Creative sales approaches and customer interaction

See Appendix B, Question 193, for specific responses.

Suggestions for General Improvements for Roundtable Meetings
Trade allies were also provided with a space for more general suggestions regarding the roundtable meetings. Twenty four responses were collected, including:

- Be more open to contractor feedback
- More time for discussion and interaction
- Provide them in more areas
- Have trade allies submit questions in advance

See Appendix B, Question 194, for specific responses.

Suggestions for Making Attendance to Roundtables Meetings Easier
Trade allies that had not attended a roundtable discussion were asked what Energy Trust could do to make attendance easier. Twenty one responses were collected. Reoccurring themes included:

- Provide more outside of Portland Metro Area, notably Southern Oregon
- Provide afternoon or evening meetings, not just mornings
- Provide an agenda

Seep Appendix B, Question 195, for specific responses.

Roundtable Summary and Recommendations
Almost half of responding trade allies attended a roundtable discussion in the past, a noticeable increase in attendance over last year's respondents. Just half of responding attendees found the event useful, as trade allies continue to request that these roundtable discussions be more interactive. Energy Trust should continue to look into how this need can be accommodated in an effort to make these events more useful to contractors.

As in previous years, location of the roundtable discussions is a major barrier to trade ally attendance. It is recommended that Energy Trust continue to hold these events in more diverse geographic locations, and that telecommuting alternatives be investigated.

Communication

Trade allies were asked a series of questions regarding communication about energy efficiency and Energy Trust. These included questions on preferred methods and frequency of receiving notifications from Energy Trust and what other sources were used for energy efficiency information.

Preferred medium of communication about program updates*

	Residential	Commercial	Solar	Other	Total
Count	78	17	8	2	105
Emails from program staff	83%	88%	88%	100%	85%
Training sessions	24%	41%	13%	0%	26%
Insider newsletter	26%	24%	38%	0%	26%
Energy Trust website	22%	12%	13%	50%	21%
Calls from program staff	21%	12%	13%	50%	19%
Roundtable meetings	15%	18%	13%	0%	15%

*Respondents were asked to select one or two most preferable mediums

Emails from program staff were by far the most preferred method for receiving information from Energy Trust. A relatively high percentage of commercial allies, 41%, indicated that receiving information at training sessions was preferable.

Two trade allies wrote in other types of communication that they preferred; 'written materials' and 'other contractors'.

Preferred frequency of communication about program updates

	Residential	Commercial	Solar	Other	Total
Count	75	14	7	2	98
Weekly	28%	21%	14%	50%	27%
Bi-Weekly	17%	14%	14%	0%	16%
Monthly	33%	50%	29%	50%	36%
Bi-Monthly	8%	14%	14%	0%	9%
Other	13%	0%	29%	0%	12%

When asked how frequently they would like to be contacted by Energy Trust regarding news and program updates the most common answer was on a monthly basis (36%). Another 43% of respondents indicated that they would like to be contacted more frequently than on a monthly basis; 27% and 16% preferred to be contacted on a weekly and bi-weekly basis, respectively.

Respondents were provided with a space to write in 'other' preferred frequencies of communication. Thirteen responses were collected, including:

- Whenever a change is made
- Contact as needed
- Yearly

See Appendix B, Question 197, for specific responses.

Trade Ally Sources for Energy Efficiency Information

Trade allies were asked about their main sources for energy efficiency information. Representative responses are listed below, categorized by medium.

Online

- ARI
- Energy Trust
- Energy Star
- Oregon Department of Energy
- Manufacturer and retail sites

Publications

- Home Energy Magazine
- Home Performance Magazine
- Mother Earth News
- Sun, Wind, Energy Magazine

Trade Shows

- ACI Conference
- Northwest Solar Expo
- Sol West
- Greener Homes and Gardens

Other

- Manufacturer and sales representatives
- Paid training
- Trade groups
- Pro Solar
- Vendor seminars

See Appendix B, Question 198, for all responses.

Communication Summary and Recommendations

The majority of responding trade allies preferred to be contacted about program updates at least once a month via email from program staff. Energy Trust should continue to contact trade allies via emails from program staff, perhaps in a less general and more individualized manner. Where possible, efforts should be made to tailor messages to specific trade allies' needs and concerns, updating them on relevant program changes and related information as they occur. Efforts of this nature should increase for those trade allies that are most active with Energy Trust programs.

Responding trade allies identified a list of publications, web sites, and trade shows that they use as primary sources for information on energy efficiency. It is recommended that Energy Trust use this list to increase networking capabilities and overall awareness of Energy Trust. Where appropriate, Energy Trust should distribute press releases and program information to these websites, publications, and organizations. Energy Trust should also consider having a presence at the relevant trade shows and conferences identified by the respondents.

Insider Newsletter

Trade allies were also asked a series of questions about the Insider Newsletter. These questions ranged from awareness of the publication, to degree of use and usefulness of the publication.

Awareness of the Insider

	Residential	Commercial	Other	Solar	Total
Count	76	15	2	7	100
Yes	55%	53%	100%	57%	56%
No	32%	47%	0%	43%	34%
Don’t know	13%	0%	0%	0%	10%

As in 2008, the majority of this year’s respondents are aware of the Insider Newsletter. The distribution of awareness mirrors that of 2008, with the exception that this year’s commercial and solar allies are slightly less likely to be aware of the publication.

Regularity of Insider use

	Residential	Commercial	Solar	Other	Total
Count	42	8	4	2	56
Don’t receive the Insider	2%	0%	0%	0%	2%
Don’t read the Insider at all	5%	0%	0%	0%	4%
Forward the Insider to other staff	10%	0%	0%	50%	9%
Occasionally read the Insider when I get a chance	41%	38%	50%	0%	39%
Regularly read the Insider when I receive it	50%	63%	50%	100%	54%

Note: Multiple responses allowed

Those allies aware of the Insider were asked follow up questions on their use of the publication. Of these 56 respondents, 54% read the Insider regularly and 39% read it occasionally. Just 9% of these respondents forward the Insider to other coworkers and staff.

Usefulness of the Insider

	Residential	Commercial	Other	Solar	Total
Count	41	8	2	4	55
Very	20%	25%	50%	25%	22%
Somewhat	76%	63%	50%	50%	71%
Not at all	5%	0%	0%	25%	5%
Don't know	0%	13%	0%	0%	2%

As with last year's responses, the majority of trade allies find the Insider 'somewhat' useful. An increase in the percentage who feel that the Insider is 'very' useful accompanied by a decrease in how many find it 'not at all' useful indicate that the publication has improved since last year.

Number of employees at trade ally's company that received the Insider

	Median	Minimum	Maximum	N
Commercial	1	0	2	7
Industrial	3	3	3	1
Wind	2	2	2	1
Residential	2	0	5	38
Solar	1.5	0	2	4
Total	2	0	5	52

Across all sectors, a median of 2 employees receive the Insider at each trade ally.

Articles in the Insider that are most useful

	Residential	Commercial	Solar	Other	Total
Count	42	8	4	2	56
Energy Trust program updates	91%	88%	100%	100%	91%
Common problems/solutions	76%	50%	50%	50%	70%
Emerging Technologies	57%	63%	75%	50%	59%
Case studies of successful projects	43%	38%	50%	50%	43%
Technical Assistance or Resources	43%	25%	50%	50%	41%
Updates on Energy Trust goals	38%	38%	25%	100%	39%
Non-Energy Trust news	17%	0%	0%	50%	14%

Articles concerning Energy Trust program updates, common problems and their solutions, and emerging technologies appear to be the most useful types of articles for the Insider Newsletter. Non-Energy Trust news received the lowest level of interest.

There were three 'other' responses written in. These were:

- New policy initiatives
- Top trade allies and their success stories
- Notification on process and form changes

Suggestions for Insider Improvements
Respondents were asked for suggestion on what Energy Trust could do to make the Insider more useful. Twelve responses were collected. Representative responses included:

- Put program updates on page one
- Keep it smaller
- Provide links to other resources for more information on specific articles and topics
- Provide more technical/program assistance

See Appendix B, Question 204, for specific responses.

Insider Summary and Recommendations
Over half of responding trade allies are aware and receive the Insider newsletter published by Energy Trust. The majority of contractors receiving this publication read it semi-regularly and found it to be at least 'somewhat useful'. The Insider Newsletter should increase its efforts to tailor the publication to individual programs and contractors. Having information most relevant to individual contractors most accessible will continue to increase the usefulness and frequency of use of the Insider.

Responding trade allies indicated that articles concerning Energy Trust program updates, commonly encountered problems and solutions, and emerging technologies would be most useful to them. It is recommended that Energy Trust continue to focus on these topics in future publications of the Insider, and to shift its focus where needed. Energy Trust should continue to solicit suggestions for improving the newsletter.

Although the Insider was reported to be useful by those who read it, just half of respondents were unaware of the publication. Energy Trust should renew its effort to increase awareness and use of the Insider in an effort to increase communication and understanding between Energy Trust and trade allies.

Website

Trade allies were asked a series of questions regarding the Energy Trust website. These included the frequency of use, the most commonly used pages, the ease of use, and the overall usefulness.

Frequency of Energy Trust website use

	Residential	Commercial	Other	Solar	Total
Count	76	15	2	7	100
Never	9%	7%	0%	29%	10%
1-3 times a month	67%	73%	50%	29%	65%
1-2 times a week	8%	20%	0%	0%	9%
3-4 times a week	13%	0%	0%	43%	13%
5 or more times a week	3%	0%	50%	0%	3%

One quarter of all respondents indicated that they check the Energy Trust website at least once a week. Just 10% never visit the website, a significant reduction from the 28% who never used the website in 2008. The majority of trade allies, 65%, visit the Energy Trust website 1-3 times a month.

Typically visited pages of Energy Trust website

	Residential	Commercial	Other	Solar	Total
Count	69	14	2	5	90
Program incentives	77%	57%	50%	80%	74%
Program forms	59%	50%	50%	100%	60%
General program information	52%	64%	100%	40%	56%
Trade ally list	32%	43%	50%	40%	36%
Calendar/meetings	28%	43%	100%	40%	34%
Consumer pages	12%	7%	50%	20%	12%

Those trade allies that visited the Energy Trust website were asked what pages they typically visit. The pages for program incentives and forms continue to be the most frequently visited, closely followed by pages for general program information.

Respondents were provided with a space to write in ‘other’ pages of the Energy Trust website that were typically visited. The three responses collected were:

- Calculator for return on solar electric investment
- Continue to look for a specific site for duct sealing
- Financing
-

Usefulness of Trade Ally Web Pages

	Residential	Commercial	Other	Solar	Total
Count	67	13	2	5	87
Not at all useful	0%	0%	0%	0%	0%
2	5%	31%	0%	20%	9%
3	37%	23%	100%	0%	34%
4	40%	46%	0%	40%	40%
Very useful	18%	0%	0%	40%	16%

The majority of responding trade allies found the trade ally web pages to be 'useful' or 'very useful'. Overall, opinions on the usefulness of these web pages improved slightly over those of last year.

Suggestions for Improving the Trade Ally Web Pages
Trade allies were asked for suggestions on what improvements Energy Trust could make to add value to the trade ally web pages. Sixteen responses were collected, including:

- Ability to 'self-update' company information
- Blog
- Follow up on specific website for duct sealing opportunities
- Add length of service with ETO
- Interactive forms and online submittals

See Appendix B, Question 208, for specific responses.

Ease of Energy Trust website navigation

	Residential	Commercial	Other	Solar	Total
Count	67	13	2	5	87
Very difficult	0%	0%	0%	0%	0%
2	9%	23%	0%	0%	10%
3	42%	31%	0%	20%	38%
4	31%	23%	50%	40%	31%
Very easy	18%	23%	50%	40%	21%

When asked about the ease of use of the website, the majority of respondents found the site 'easy' or 'very easy' to navigate. This year no respondents indicated that the Energy Trust website was 'very difficult' to navigate, an improvement over last year's responses.

Suggestions for the Energy Trust Website Redesign
When asked for suggestions for the Energy Trust website redesign, 25 suggestions were collected. Representative responses included:

- More emphasis on using a trade ally
- More web based calculator tools
- A trade ally profile page
- Easier, more intuitive navigation
- A page specifically for forms that includes a brief description

See Appendix B, Question 210, for specific responses.

Website Summary and Recommendations

The Energy Trust website continues to be used more and more frequently by responding trade allies. The use and quality of the Energy Trust website should be reexamined again after its redesign process has been completed. Those pages of the website that show further room for improvement, such as the trade ally pages, should be more closely examined. Information on the changes that different user groups are wanting from the Energy Trust website, and the plausibility of those improvements, would be beneficial.

In the spirit of simplifying Energy Trust paperwork and the incentive application process, the request for interactive forms and online submittals should continue to be accommodated. As this process continues to move forward, efforts should be made to synchronize Energy Trust and energy tax credit paperwork.

In recognition of contractors with long standing status as a trade ally, it appears reasonable to add to the contractor list the length of time as an Energy Trust trade ally.

Energy Efficiency Program Satisfaction

Commercial, residential, and industrial trade allies were asked to rate their satisfaction with Energy Trust and other program staff in a variety of select areas. Responses were given on a scale of 1 to 5, 1 being 'very unsatisfied' and 5 being 'very satisfied'. The one industrial trade ally appears 'very dissatisfied' with Energy Trust across all of the following categories.

Percent expressing 'Satisfied' or 'Very satisfied' responses for:

- Overall satisfaction……………………..……………………….........67%
- Incentive payment processing time……………...……………..57%
- Turnaround time for incentive application/approval of paperwork……...61%
- Interaction with Energy Trust staff…………………………….....69%
- Response times to requests for information……………………66%
- Response times to requests for assistance on forms…………65%

Overall satisfaction

	Residential	Commercial	Industrial	Total
Count	72	13	1	86
Very unsatisfied	7%	0%	100%	7%
2	10%	0%	0%	8%
3	22%	0%	0%	19%
4	25%	31%	0%	26%
Very satisfied	36%	69%	0%	41%
2009 mean response	*3.7*	*4.7*	*1.0*	*4.0*
2008 mean response	*4.0*	*4.4*	*4.0*	*4.1*

The majority of responding trade allies reported being overall 'satisfied' or 'very satisfied' with Energy Trust this year. However, the 67% who said so has decreased from the 78% who said so last year. Commercial trade allies appear to be more satisfied than they were last year, while residential trade allies are less so.

Incentive payment processing time

	Residential	Commercial	Industrial	Total
Count	56	11	1	68
Very unsatisfied	9%	0%	100%	9%
2	5%	0%	0%	4%
3	34%	9%	0%	29%
4	21%	27%	0%	22%
Very satisfied	30%	64%	0%	35%
2009 mean response	*3.9*	*4.5*	*1.0*	*4.3*
2008 mean response	*NA*	*NA*	*NA*	*NA*

A slight majority of responding trade allies were expressed satisfaction with incentive payment processing time. Commercial allies were much more satisfied than were residential trade allies.

Turnaround time for incentive application/approval of paperwork

	Residential	Commercial	Industrial	Total
Count	57	13	1	71
Very unsatisfied	7%	8%	100%	8%
2	12%	8%	0%	11%
3	25%	0%	0%	20%
4	28%	23%	0%	27%
Very satisfied	28%	62%	0%	34%
2009 mean response	*3.6*	*4.2*	*1.0*	*3.6*
2008 mean response	*NA*	*NA*	*NA*	*NA*

Another small majority of respondents expressed satisfaction with the turnaround time for incentive applications and the approval of paperwork. However, a relatively large portion, 19%, of trade allies responded that they were ‘unsatisfied’ or ‘very unsatisfied’ with this aspect of Energy Trust.

Interaction with Energy Trust staff

	Residential	Commercial	Industrial	Total
Count	68	12	1	81
Very unsatisfied	7%	0%	100%	7%
2	7%	0%	0%	6%
3	21%	0%	0%	17%
4	22%	8%	0%	20%
Very satisfied	43%	92%	0%	49%
2009 mean response	*3.9*	*4.9*	*1.0*	*4.0*
2008 mean response	*4.0*	*4.5*	*4.3*	*4.1*

Almost half of responding trade allies reported being 'very satisfied' with their interactions with Energy Trust staff, while another 20% reported being 'satisfied'. These results are very similar to last year. Commercial trade allies reported being much more satisfied with Energy Trust staff in 2008 than in the previous year.

Response times to requests for information

	Residential	Commercial	Industrial	Total
Count	67	12	1	80
Very unsatisfied	9%	0%	100%	9%
2	7%	0%	0%	6%
3	22%	0%	0%	19%
4	24%	8%	0%	21%
Very satisfied	37%	92%	0%	45%
2009 mean response	*3.7*	*4.9*	*1.0*	*3.9*
2008 mean response	*NA*	*NA*	*NA*	*NA*

All commercial trade ally respondents expressed satisfaction with the response time to their requests for information. Just 61% of responding residential allies were satisfied with this aspect of Energy Trust, with 16% expressing dissatisfaction.

Response times to requests for assistance on forms

	Residential	Commercial	Industrial	Total
Count	52	9	1	62
Very unsatisfied	10%	0%	100%	10%
2	6%	0%	0%	5%
3	25%	0%	0%	21%
4	23%	11%	0%	21%
Very satisfied	37%	89%	0%	44%
2009 mean response	*3.7*	*4.9*	*1.0*	*3.8*
2008 mean response	*NA*	*NA*	*NA*	*NA*

All responding commercial trade allies were satisfied with response times to requests for assistance on forms as well as to requests for information. Again, residential trade allies were less satisfied.

Suggestions for Improving Energy Trust's Service

Trade allies were asked how Energy Trust could improve its service to them. One hundred and nineteen responses were received. Frequent, and representative, responses include:

- Better communication to Trade Allies
- Clearer documentation of processes
- Continue to integrate incentive processing with ODOE, etc.
- Increase Incentives

- Keep things simple
- Allow more input into program development
- Reduce your overhead
- Continue to work to get maximum amount of end money to end users
- More frequent training opportunities for contractor staff

See Appendix B, Question 177, for specific responses.

Change in working relationship with Energy Trust since last year

	Residential	Commercial	Industrial	Total
Count	76	15	1	92
Improved a lot	1%	7%	0%	2%
Improved	26%	40%	0%	28%
Stayed the same	54%	33%	100%	51%
Gotten worse	5%	0%	0%	4%
Gotten a lot worse	4%	0%	0%	3%
Don't know	9%	20%	0%	11%

Just 7% of responding trade allies indicated that their relationship with Energy Trust had worsened over the last year; all were residential trade allies. The majority of trade allies, 51%, maintained that their working relationship with Energy Trust had stayed the same since 2007.

Reasons for Relationship Improvement

Those allies whose relationship with Energy Trust had improved were asked to explain why their relationship had changed. Twenty-two responses were collected. Representative responses included:

- Attending training seminars, meeting more of the Energy Trust team, and becoming more familiar with programs/incentives
- Attendance at events
- Getting updates weekly and paperwork about new programs
- Prompt response to my questions and concerns and flexibility in the staff to respond to our needs and concerns

See Appendix B, Question 180, for specific responses.

Reasons for Relationship Deterioration

Those allies whose relationship with Energy Trust had worsened were asked to explain why their relationship had changed. Seven responses were collected. Representative responses included:

- The fact that the ETO and CSG is not responsive to the Trade Allies' suggestions or needs
- More paperwork and having to itemize contracts
- New people inexperienced or unschooled for interactions

See Appendix B, Question 179, for specific responses

Program Satisfaction Summary and Recommendations

In response to the suggestions for improving Energy Trusts' service, it is recommended that training on Energy Trust programs and the incentive application processes be increased. Greater understanding of the organization and its operations was reported to have improved some contractors' relationships with Energy Trust, and should continue to do so in the future.

Renewable Program Satisfaction

Solar and small/community wind trade allies were asked to rate their satisfaction with Energy Trust and other program staff in a variety of select areas. Responses were given on a scale of 1 to 5, 1 being 'very unsatisfied' and 5 being 'very satisfied'.

Percent expressing 'Satisfied' or 'Very satisfied' responses for:

- Overall satisfaction…………………..……………………........63%
- Incentive payment processing time……………...……………..72%
- Turnaround time for incentive application/approval of paperwork……..72%
- Interaction with Energy Trust staff……………………………...75%
- Response times to requests for information……………………51%
- Response times to requests for assistance on forms………..66%
- Quality of Energy Trust inspections…………………………..…71%
- Quality of your relationship with Energy Trust inspectors…….71%

	2009 Mean Response	2008 Mean Response
COUNT	8	9
Overall	3.6	4.0
Incentive payment processing time	3.7	NA
Turnaround time for incentive application and approval of paperwork	3.9	3.6
Interactions with Energy Trust staff	4.1	NA
Response times to requests for information	3.6	3.9*
Response times to requests for assistance on forms	3.5	3.9*
Quality of Energy Trust inspections	4.3	4.6
Quality of relationship with Energy Trust inspectors	4.1	4.8

*Worded in 2008 as 'Responsiveness to staff inquiries'

Respondents' satisfaction with the renewables program generally dropped slightly from the 2008 responses. This decline was most significant in two areas: quality of relationship with Energy Trust inspectors and overall satisfaction. Just two thirds of solar trade ally respondents indicated satisfaction with their relationships with Energy Trust inspectors. This is a deterioration from last year, when 100% expressed they were satisfied. While the majority of responding renewables trade allies were overall satisfied with Energy Trust, over one third (N=3) indicated that they were 'unsatisfied' or 'very unsatisfied'.

Satisfaction with the turnaround time for incentive applications and the approval of paperwork improved over the last year for responding solar trade allies. The dissatisfaction rate dropped from 33% to 17% this year.

Suggestions for Energy Trust Solar Programs

Renewables trade allies were then asked for suggestions for the Energy Trust solar programs. Eleven responses were collected. Representative responses are:

- Delete the additional meter requirement
- Online form submittals
- Use same forms as ODOE
- Work on passive solar education

See Appendix B, Question 166, for specific responses.

Change in working relationship with Energy Trust since last year

	Solar	Small/Community Wind	Total
Count	7	1	8
Improved a lot	0%	100%	13%
Improved	43%	0%	38%
Stayed the same	57%	0%	50%
Gotten worse	0%	0%	0%
Gotten a lot worse	0%	0%	0%

When asked how their relationship with Energy Trust had changed over the past year, half of renewables trade allies indicated that it had improved to some degree, and half indicated that it had stayed the same. This is an improvement over last year, when 22% of solar respondents indicated that their relationship with Energy Trust had gotten worse.

Reasons for Relationship Improvement

Those allies who indicated that their relationship had improved over the last year were asked to provide the reasons for the improvement. The three responses collected were:

- More information easier to locate
- My firm is new to the program. Every interaction has been great; highly professional, personable, correct, precise, enjoyable
- Our core business is now small wind and we work closely with --. She has been patient and responsive to our questions as we continue to learn the processes

Renewables Program Satisfaction Summary and Recommendations

Half of all responding renewables trade allies indicated that their relationship with Energy Trust improved between 2007 and 2008, while the other half indicated that their relationship stayed the same. Despite this, mean responses for satisfaction fell from 2007 levels in most categories, including 'overall satisfaction'.

Financing and Green Street Lending

Residential, commercial, and renewables trade allies were asked about their awareness and interest in Green Street Lending, the new financing program offered by Energy Trust. In addition they were asked more general questions about their use of financing.

Awareness of Green Street Lending Program

	Residential	Commercial	Renewables	Total
Count	77	16	9	102
Actively Offering	29%	19%	56%	29%
Aware but not offering	62%	44%	33%	57%
Unaware	9%	38%	11%	14%

Almost one third of trade allies are actively offering Green Street Lending to their customers. Solar trade allies are most likely to be offering the program while commercial allies are least likely.

Kinds of organizations financing is offered through

	Residential	Commercial	Renewables	Total
Count	78	17	9	104
Bank/financial institution	51%	12%	44%	44%
Green Street/Umpqua Bank	28%	12%	11%	24%
Manufacturer	17%	0%	22%	14%
Utility	10%	0%	22%	10%
FHA/government	6%	0%	22%	7%
Do not offer financing	32%	82%	33%	40%
Don't know	1%	6%	0%	2%

While 40% of trade allies do not offer any kind of financing to their customers, those who do most commonly offer financing through a bank or other financial institution. Green Street Lending and manufacturers are the second and third most common sources of financing.

Interest in Green Street Lending Program

	Residential	Commercial	Solar	Total
Count	48	7	3	58
Not at all interested	50%	14%	67%	47%
Somewhat interested	42%	57%	0%	41%
Very interested	8%	29%	33%	12%

Those trade allies that reported being aware of, but not actively offering, Green Street Lending were further asked about their interest in the program. Over half of these trade allies expressed interest in offering the Green Street Lending Program to their customers.

Attractive Aspects of Green Street Lending
Trade allies interested in Green Street were then asked what features of the program were most attractive and important. Nineteen responses were collected. Representative responses include:

- "0" down
- Available money in a recession
- The fact that a streamlined process is in place helps me present the options to small businesses and investors. The program appears to be well thought out and turnkey
- Low interest rates
- Ease of use

See Appendix B, Questions 19, 31, for specific responses.

Unattractive Aspects of Green Street Lending
Trade allies not interested in Green Street were asked what features (or lack of features) of the program were responsible for their disinterest. Twenty-one responses were collected. Representative responses include:

- Lending program not available to lower income customers who actually need assistance
- It is not user friendly
- Interest rates aren't impressive
- Window only projects do not qualify
- Pushing finances on customers is not what I want to do

See Appendix B, Questions 20, 32, 62, for specific responses.

Financing Summary and Recommendations
Over half of responding trade allies that were aware, but not actively offering, financing through the Green Street Lending program expressed interest in offering the program to their customers in the future. Trade allies should be offered training in the details and participation process of the program. In addition, it should be made increasingly aware that the Green Street Lending program is not solely for residential customers, but commercial as well.

Future surveys should probe deeper into the reasons why trade allies do not offer financing to their customers, as 40% of this year's respondents indicated that they offer no financing at all. Contractors may not offer financing for one of two reasons: there is no demand from their customers, or there is no financing option that meets their needs. If the latter is true, Energy Trust may be able to help craft viable financing solutions for trade allies.

3.2 Residential Trade Ally Findings

Demographics
- 78 trade allies identified themselves as primarily working in Residential programs.
- Median firm size in Oregon for residential trade allies is 8.
- 66% have been an Energy Trust trade ally for 3 years or more.
- 43% of residential trade allies derived less than 25% of their 2008 revenue through Energy Trust program participation.
- 47% expect to increase the proportion of their projects involving Energy Trust in 2009.

Program Residential Trade Allies Primarily Worked With

Count	78
Home Energy Solutions (existing homes)	74%
Home Performance with ENERGY STAR	12%
Other residential program	6%
ENERGY STAR New Homes (new home construction)	5%
ENERGY STAR Products (appliances)	3%

The majority of responding residential trade allies, 74%, primarily worked with the Home Energy Solutions program at Energy Trust. Another 12% primarily worked with the Home Performance with ENERGY STAR program.

Top 3 equipment/services installed in 2008

Count	78
Gas furnace	45%
Heat pump	44%
Duct sealing and duct insulation	39%
Other	32%
Insulation	28%
Windows	18%
New site-built home	12%
Solar Electric	4%
Solar Water heating	1%

Forty-five and 44% of responding residential trade allies regularly install gas furnace and heat pumps, respectively. Duct sealing and duct insulation, and general insulation were also frequently installed by residential allies.

There were 17 ‘other’ responses collected. Six allies wrote in ‘tankless water heaters’, and 3 wrote in ‘air sealing’. Other representative responses included:

- Boilers
- Washers

See Appendix B, Question 21, for specific responses.

Primary equipment/service installed in 2008

Count	72
Gas furnace	26%
Insulation	21%
Heat pump	19%
Duct sealing and duct insulation	11%
Other	11%
Windows	10%
New site-built home	1%

For the second year in a row gas furnaces were most frequently cited as the primary equipment/service installed by responding residential allies in 2008. Insulation and heat pumps are the second and third most common primary equipments installed.

Suggestions for Emerging/Existing Technologies
Residential trade allies were asked what emerging technologies they would like to see Energy Trust provide incentives for. While 58 responses were collected, the most commonly cited technologies were:

- Air sealing: retain/increase current incentives
- Duct sealing: retain/increase current incentives
- Geothermal heat pumps
- Heat and energy recovery ventilation systems
- Zone systems

See Appendix B, Question 23, for specific responses.

Trade Ally Re-enrollment

Residential trade allies were asked if they participated in the 2008 trade ally re-enrollment process, and were further asked about their experience with the enrollment.

Participation in trade ally re-enrollment

Count	78
Yes	60%
No	14%
Don't know	26%

Sixty percent of the responding residential trade allies participated in the re-enrollment process. The majority of those who indicated that they hadn't participated in the re-enrollment process (10 of 11) are new to the program, having been trade allies for less than 1 year.

Effectiveness or residential trade ally re-enrollment process

	Renewal handled efficiently	Information Updated Correctly
Count	47	47
Yes	85%	83%
No	9%	9%
N/A	6%	9%

The strong majority of respondents who underwent the re-enrollment process indicated that their renewal was handled efficiently and their information updated correctly (85% and 83%, respectively). When compared to the 2008 survey responses, this year's results indicate that the re-enrollment process has improved.

Suggestions for Improving the Trade Ally Re-enrollment Process

Trade allies who participated in the re-enrollment were asked for suggestions on how the process could be improved. Eleven responses were collected. Representative responses included:

- Online application/paperless system
- Allow us to proof our posting on the Internet
- Extend re-enrollment for more than three years and keep programs stable and beneficial to trade-ally
- Ensure there are clear instructions for existing Trade Allies and a contact for questions like has been done in the past

See Appendix B, Question 15, for specific responses.

Residential Trade Ally Demographics Summary and Recommendations

For the third year in a row, gas furnaces were the most common equipment primarily installed by responding residential allies. More than half of residential respondents participated in the re-enrollment process. The majority of those allies that re-enrolled indicated that the process was handled both efficiently and accurately. In response to several requests, Energy Trust should investigate allowing trade allies to update their information on the Energy Trust website themselves.

Responses concerning the trade ally re-enrollment indicate that the process is working well. While residential trade allies appear to be generally satisfied with the process, suggestions for improving it should be looked into to see where those improvements may be implemented. It is recommended that questions on the effectiveness of the re-enrollment process not be asked on future trade ally surveys.

Gas Furnaces

Percent total gas furnace sales for existing homes by efficiency*

	Gas Furnace
Count	19
95% or more efficient	33%
90%-94% efficient	28%
80%-89% efficient	39%

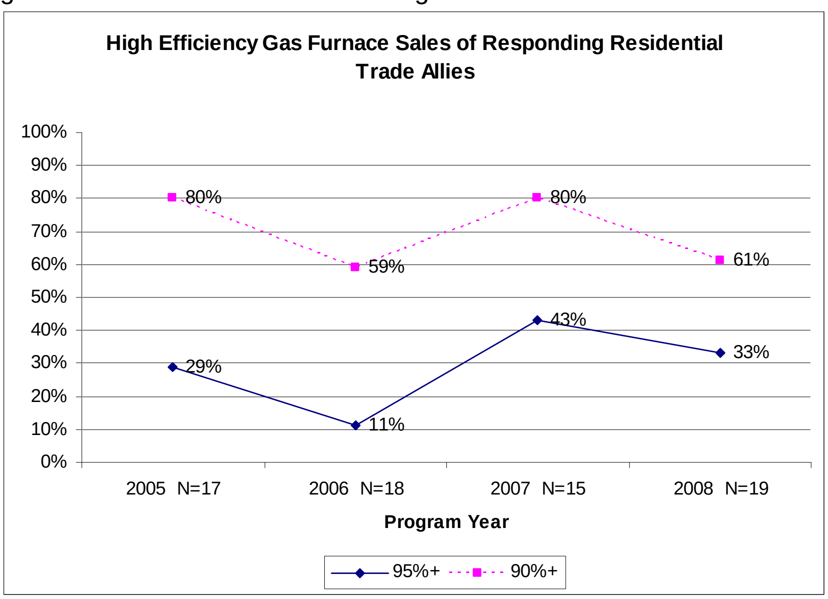
*Weighted by firm size.

As with last year, the majority of gas furnace installations in existing homes by responding trade allies were using high efficiency equipment (90% or more efficient). The 61% of installed furnaces that are high efficient is a noticeable decrease from the 80% that were reported in 2008.

The following graph shows the percentage of responding allies furnace sales that are high efficiency furnaces (90% or more efficient), and the proportion of those high efficiency furnaces that are 95% efficient, as reported in the last four trade ally surveys. According to survey respondents the percentage of high efficiency furnaces that are 95% efficient has increased over the last four years, although overall the market share of high efficiency furnaces has not increased.

These findings are relatively consistent with those of the Gas Furnace Market Transformation Study currently being conducted for Energy Trust. Three surveys of gas furnace contractors and distributors were conducted; two in Oregon and one in Clark County, Washington. These surveys consistently estimated the market share of high efficiency gas furnaces (AFUE 90% or more) at 63-64%, an estimate consistent with the responses to this survey.

However, these surveys estimate the market share of gas furnaces with AFUE 95% or greater to be 5-13%. This indicates that either contractors responding to the trade ally survey consistently overestimate the market share of these furnaces (or the respondents to the Market Transformation surveys underestimate their market share), or that contractors involved with Energy Trust typically move more efficient furnaces. This may indicate that Energy Trust support and Energy Trust incentives are important elements in getting furnaces with an AFUE 95% or higher installed.



Percent total gas furnace sales for new homes by efficiency*

	Gas Furnace
Count	15
95% or more efficient	22%
90%-94% efficient	29%
80%-89% efficient	47%

*Weighted by firm size.

Gas furnaces installed in new homes are split almost evenly between high efficiency and 80-89% efficient equipment. New homes are less likely to have 95% efficiency furnaces, and more likely to have 80-89% efficiency furnaces installed, than are existing homes that are buying a new furnace.

Estimated cost differential (equipment and installation) between a code (80% efficient) furnace and a standard condensing furnace (90-94% efficient)

	Gas Furnace
Count	19
$501-$750	21%
$751-$1,000	32%
$1,001-$1,250	26%
Over $1,250	21%

When asked to estimate the cost differential between a code furnace (80% efficient) and a standard condensing furnace (90-94% efficient) over half estimated the incremental cost being under $1,000, the most common estimate being between $751 and $1,000. Interestingly, one fifth of the respondents thought the difference was less than $750, and one fifth though it was more than $1,250. All four trade allies that estimated the cost differential to be under $750 are located in the Portland Metro area, while those who estimated the difference to be over $1,250 are located throughout western Oregon.

Percent total 2008 gas furnaces installed with specific technology*

	Gas Furnace
Count	15
Included an ECM	41%
Included an air cleaner	66%

*Weighted by firm size.

When weighted by firm size, approximately 41% of gas furnaces installed in 2008 had an ECM, and 66% had an air cleaner. Depending on their use, the presence of air cleaners may have implications for energy savings achieved by energy efficient furnaces, as they are typically meant to run continuously. Future research should look into the behavior of home owners in regards to their use of air cleaners.

Estimated cost differential between a furnace with an ECM and one without

	Gas Furnace
Count	19
$200-500	16%
$501-$750	21%
$751-$1,000	42%
Over $1,000	21%

When asked about the cost differential between a furnace with and without an ECM (electronically commutated motor?) the most frequent estimate was between $751 and $1,000. In 2008, just 25% of respondents thought the differential was between $751 and $1,000, and just 5% thought it was over $1,000.

Awareness of the planned discontinuation of gas furnace incentives

Count	19
Yes	79%
No	21%

At the time the survey was written, Energy Trust was planning to discontinue incentives to most residential customers for high efficiency gas furnaces on May 1, 2009. When asked if they were aware of this change, 79% indicated that they were. Since then, the residential program has elected to reduce incentives to $100 for the remainder of 2009.

How would the discontinuation of gas furnace incentives affect your sales of high efficiency (AFUE 90% or more) gas furnaces?

Count	19
Prohibit all sales of high efficiency furnaces	0%
Reduce sales substantially	63%
Reduce sales somewhat	32%
Reduce sales slightly	5%
Would not affect sales at all	0%

When asked how they expect the discontinuation of the gas furnace incentive to effect their sales of high efficiency furnaces, the majority (63%) responded that it would 'reduce sales substantially'. The remainder of the respondents indicated that the discontinuation will reduce their sales to a lesser degree.

Suggestions for Gas Furnace Emerging/Existing Technologies

Trade Allies were asked if there were any emerging/existing technologies related to gas furnaces that they would like to see Energy Trust provide incentives for. The following 11 responses were provided:

- 95% and above (3)
- ECM motors (2)
- 90% and above (2)
- Homeowners will not opt for the higher efficiency without the incentive

- Air quality products
- Heat recovery ventilation systems
- Multi-stage

Gas Furnace Summary and Recommendations

The majority of gas furnaces installed by responding trade allies were high efficiency (90% efficient or higher) and included air cleaners. Future research should be conducted to examine the prevalence with which air cleaners are installed with gas furnaces, home owners' use of air cleaners, and the effects they may have on energy savings.

All responding trade allies that primarily install gas furnaces indicated that discontinuation of incentives for high efficiency furnaces would negatively affect sales, the majority thinking it would do so substantially. It is recommended that future research be conducted at the distributer level of the furnace market to examine the effect that the reduction of Energy Trust incentives has on high efficiency furnace sales.

That 21% of these respondents were unaware of the planned changes concerning gas furnaces indicates some miscommunication between Energy Trust and these trade allies. Efforts should be made to make important program changes clear on both the Energy Trust website and the Insider newsletter, and to increase awareness of these resources among contractors.

Heat Pumps

Percent of 2008 heat pump sales by efficiency*

	Heat Pump
Count	14
HSPF 9.5 or better	9%
HSPF 9.0-9.4	27%
HSPF 8.5-8.9	25%
HSPF 8.2-8.4	19%
HSPF code	19%

*Weighted by firm size.

While there was very little change in the reported percentage of heat pumps installed in 2008 that had an HSPF of 9.0 or better, the average HSPF appears to have decreased from last year. There was a significant rise in the reported percentage of heat pumps that had a code HSPF or an HSPF of 8.2-8.4, from 6% to 19% and from 9% to 19%, respectively.

Awareness of Energy Trust's change in heat pump incentives

Count	14
Yes	93%
No	7%

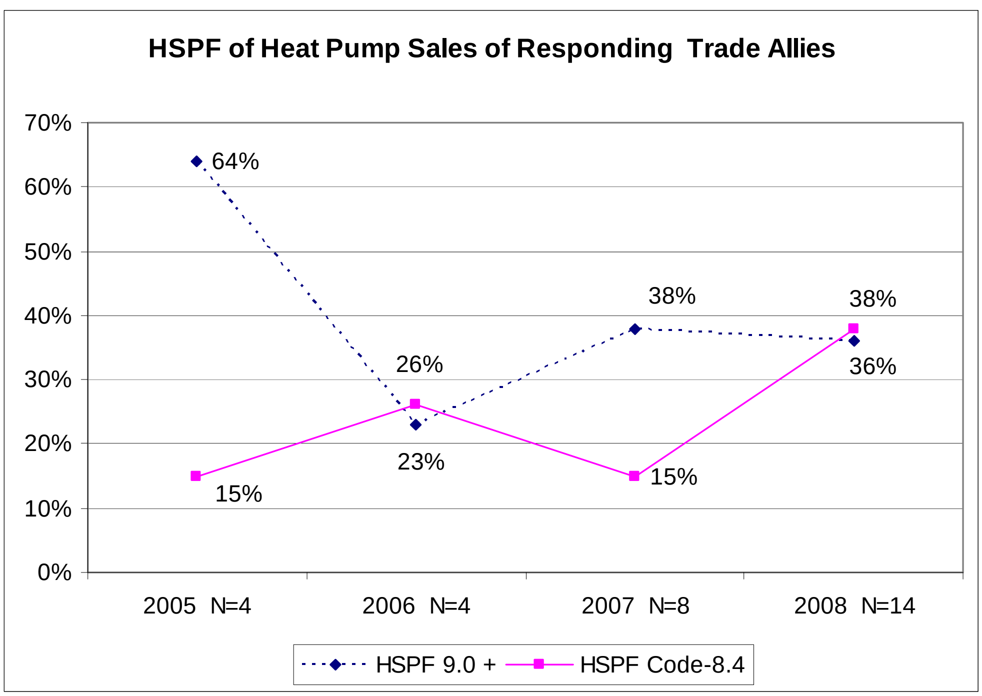
On May 1, 2009, Energy Trust changed the heat pump incentive to require an HSPF of 9 or more for heat pumps under 5 tons. When asked if they were aware of this upcoming change, just 7% indicated that they were not.

If the requirement for heat pumps were to increase, how would it affect your customers' choices in heat pumps?

Count	13
Most would not install a heat pump	8%
Most would choose HSPF below 8.2	8%
Most would choose HSPF 8.2-8.9	31%
Most would choose HSPF 9.0 or above	8%
Don't know	46%

Respondents were then asked how they expect the change in incentive will affect customers' choice in heat pumps. While the most frequent response was that they didn't know, 31% indicated that customers would choose a heat pump with an HSPF between 8.2 and 8.9. Just 8% indicated that customers would choose a heat pump that was eligible for an Energy Trust incentive.

The following graph charts the percentage of respondents' heat pump sales that had various HSPF levels, as reported in the last four trade ally surveys. Of primary concern are high efficiency heat pumps (HSPF 9 or more) and the relatively low efficiency heat pumps (HSPF code-8.4). The percentage of respondents' heat pump sales that have an HSPF that is code-8.4 has reportedly been increasing over the last four years. Future research should be conducted to examine the effects that increasing the Energy Trust requirements of heat pumps will have on the market shares of heat pumps with various efficiency levels.



Estimated cost differential (equipment and installation) between a code (7.8 HSPF) heat pump and a heat pump with a 9 HSPF

	Heat Pump
Count	13
$200-500	8%
$501-$750	15%
$1,000-$1,250	39%
Over $1,250	39%

When asked to estimate the cost differential between a code heat pump (7.8 HSPF) and a 9 HSPF heat pump, 78% responded that it was over $1,000.

Percent of jobs that use commissioning

	Heat Pump Commissioning
Count	13
0%	31%
1-24%	23%
25-49%	23%
50-74%	8%
75-100%	8%
Don't know	8%

Just 24% of responding residential trade allies that primarily install heat pumps indicated that they use commissioning on more than half of their jobs. Last year 50% of respondents indicated that they used commissioning more than half of the time.

Reasons for not using commissioning

	Heat Pump
Count	13
Takes too much time	31%
Do not trust results	8%
Too expensive	62%
No customer demand	46%
Do not need commissioning, standard diagnostic adequate	31%

The two most common responses for why trade allies were not using commissioning on their jobs were that it was too expensive, and that there was no customer demand.

'Other' reasons provided for not using commissioning on heat pump jobs were:

- Complicates the process and makes it very expensive for owners
- Cost of testing does not outweigh the incentives
- My systems are fired off by factory trained tech, and commissioning is wasteful and timely

Heat Pump Summary and Recommendations

All but one of the responding trade allies that primarily install heat pumps were aware of the planned changes for heat pump incentives; just 8% of whom thought that customers would respond to the increased requirements by choosing the more efficient technology. This may be due to the perception among the majority of respondents (78%) that heat pumps with an HSPF of 9.0 cost over $1,000 more than a heat pump with a code HSPF. Future market research should examine the effect of Energy Trust incentive changes on the residential heat pump market.

Responding trade allies reported a large increase in the percentage of heat pump installations that did not qualify for Energy Trust incentives in 2008 (HSPF below 8.5) when compared to previous years. Respondents also indicated a decrease in the frequency with which commissioning was used in 2008 compared to 2007; the majority cited excess cost as the main reason why they didn't use commissioning.

Insulation

Percent of existing homes that still need additional insulation*

	Insulation
Manufactured homes (N=9)	57%
Multifamily (2-4 units) (N=12)	59%
Multifamily (5+ units) (N=11)	51%
Single Family (N=14)	56%

When asked about the need for additional insulation in homes in both Energy Trust service area and individual contractor service area, responding trade allies reported that over half of all homes (single family, multifamily, and manufactured) required additional insulation. Data on the recommendations resulting from Home Energy Reviews (HERs) performed by Energy Trust in 2007 and 2008 shows that 80% of those homes that received an HER could use additional insulation. The following table compares the percentage of these homes that could use specific types of insulation as reported by survey respondents with the recommendations from the HERs.

Percent that could use insulation that can be economically done

	Survey Respondents	Home Energy Reviews
Count	14	12,076
Ceiling	90%	73%
Walls	74%	49%
Floor	80%	62%

Respondents felt that in the majority of those homes that still needed more insulation it could be economically done; especially for ceiling and floor insulation. Although these estimates were consistently higher than the recommendations provided by Home Energy Reviews (25-50% higher), It does appear that the majority of homes that could use additional insulation would benefit from ceiling and floor insulation.

Percentage of 2008 insulation jobs that had air sealing performed

	Insulation
Count	15
0%	20%
1-24%	13%
25-49%	7%
50-74%	20%
75-100%	33%
Don't know	7%

One third of responding residential allies that primarily install insulation performed air sealing on 75-100% of their jobs; one fifth didn't perform air sealing on any of their 2008 insulation jobs.

Insulation Summary and Recommendations

Responding residential trade allies that primarily install insulation feel that the majority of existing homes could still use more insulation, 74-90% of which could be done economically. One fifth of these respondents indicated that they did not perform air sealing on any of their 2008 insulation jobs.

Duct Sealing and Duct Insulation

The percentage of duct sealing and insulation jobs done by type of building*

	Duct sealing and duct insulation
Count	6
New buildings	1%
Existing buildings	98%

*weighted by firm size

Almost all duct sealing and duct insulation jobs done by respondents in 2008 were for existing homes.

Percentage of 2008 duct sealing jobs that also had duct insulation installed

	Insulation
Count	8
0-24%	38%
25-49%	13%
50-74%	25%
75-100%	25%

Don't know	0%

Half of responding residential trade allies that primarily perform duct sealing performed duct insulation on 50% of their jobs or more. Thirty-eight percent of these firms performed duct insulation on less than one quarter of their duct sealing jobs. A lack of insulation and air sealing could potentially be negatively affecting the energy savings from duct sealing jobs. The interaction between duct sealing, duct insulation, and air sealing should be further examined to determine the effect on energy savings.

Percentage of homes by heating fuel type where insulation work was done*

	Duct insulation
Count	6
Gas	65%
Electricity	28%
Oil	6%
Other	0%

*Weighted by firm size

Two thirds of 2008 duct insulation jobs by respondents were performed on gas heated homes. Most of the other homes had electric heat.

Issues with New Building Codes

Residential duct sealing/insulating allies were asked if they had any issues with the new residential building codes that went into effect in April of 2008. There were four responses; three people said 'no', and one person said that 'venting now is just plain crazy'.

Awareness that Energy Trust is changing the duct sealing incentive

Count	8
Yes	100%
No	0%
Don't know	0%

On May 1, 2009, Energy Trust changed the incentives for duct sealing to half of the cost, up to $400, for electrically heated homes, and half the cost, up to $350, for gas heated homes. All of the trade allies responding were aware of the proposed changes in incentives.

How would the change in duct sealing incentives affect your sales of duct sealing work?

Count	8
Prohibit all sales of duct sealing	25%
Reduce sales substantially	50%
Reduce sales somewhat	13%
Reduce sales slightly	0%
Would not affect sales at all	13%

When further asked about how this change in incentives would affect sales of duct sealing work, one quarter indicated that it would prohibit all sales of duct sealing. One half of respondents thought that the change would substantially reduce their sales.

Duct Sealing and Duct Insulation Summary and Recommendations

Respondents who primarily installed duct sealing and duct insulation reported that almost all of their jobs were done on existing homes, two thirds of which were heated by gas. These contractors were all aware of the proposed changes to Energy Trust incentives for duct sealing, and primarily expected negative affects to result. One quarter indicated that the change would prohibit future sales of duct sealing, while another 50% indicated that the changes would substantially reduce sales.

It is recommended that further research look into the interaction between duct sealing, duct insulation, and air sealing, to look at the effect that this interaction may have on energy savings.

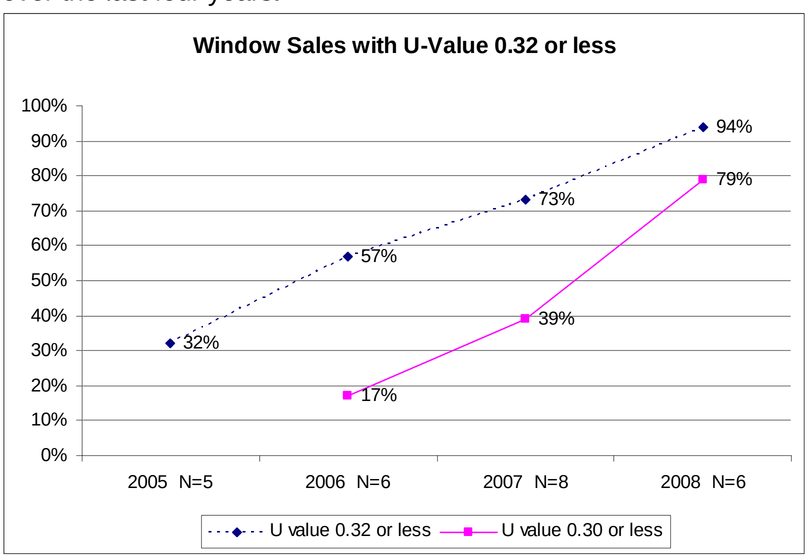
Windows

Percent of 2008 residential windows installations by efficiency*

	Windows
Count	6
0.26 U value or less	1%
0.26-0.30 U value	78%
0.31-0.32 U value	15%
0.33-0.34 U value	4%
0.35 U value	3%

***Weighted by firm size**

The following graph shows the percentage of respondents' window sales that had a U Value of 0.32 or less and the percentage that had a U Value of 0.30 or less, as reported in the last four trade ally surveys. According to respondents, the share of their window installations involving high efficiency windows has steadily increased over the last four years.

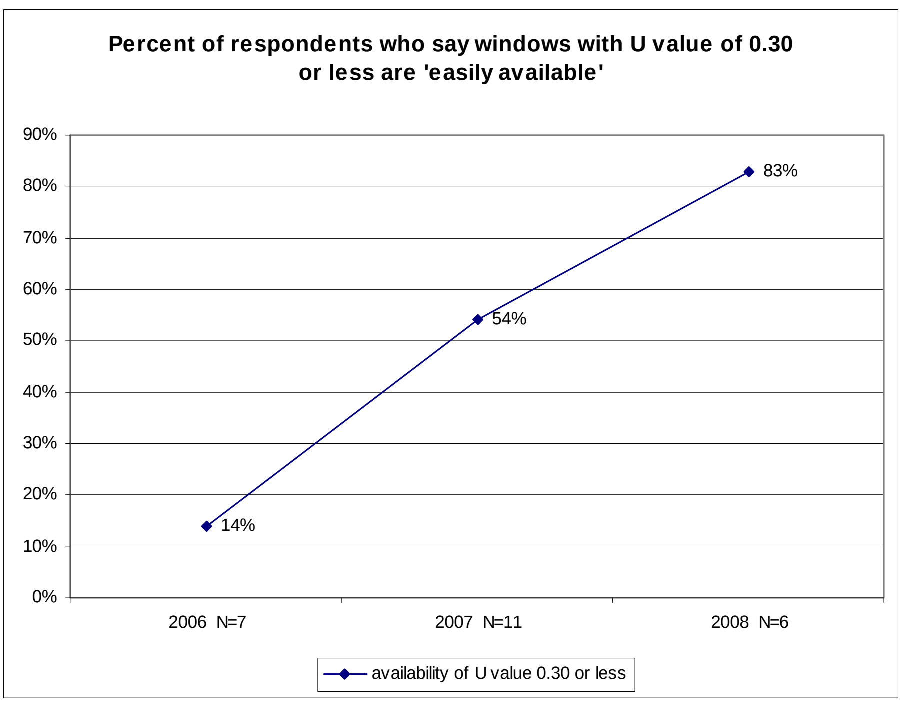


Residential trade allies that primarily installed windows were asked about the efficiency of the windows they installed. Seventy-nine percent of the windows installed by respondents had U value between 0.26 and 0.30, the level needed to qualify for Energy Trust incentives. This is a large increase over the 39% of window installations with a U value between 0.26 and 0.30 in 2007. The above chart shows the growth in market share of energy efficient windows over the last four years, as reported by respondents to the trade ally survey.

Availability of windows with specific U-Values

	Less than 0.26 U-value	0.26-0.30 U-value
Count	5	6
Not available at all	20%	0%
Difficult to get	40%	17%
Some models are available	20%	0%
Easily available	0%	83%
Don't know	20%	0%

Respondents were asked about the availability of windows that qualify for Energy Trust incentives. While the majority of respondents felt that windows with a U value of 0.26-0.30 were easy to get, more efficient windows appear to be more elusive. Twenty percent reported that they could not get more efficient windows at all, and 40% responded that they were available but difficult to get. The following chart shows the change in availability of windows with a U value of 0.30 or less over the last three years, as reported by respondents to the trade ally survey.



Windows Summary and Recommendations
Respondents report that energy efficient windows with a U value of 0.32 or less continue to gain market share, and now dominate the majority of these contractors' window installations. While windows with a U value of 0.30 appear to be easily available in most areas, just 1 of the respondents indicated that more efficient windows with a U value of 0.26 were not difficult, if not impossible to get.

It is recommended that Energy Trust examine the Northwest Energy Efficiency Alliance (NEEA) information on the market transformation of high efficiency windows to see if Energy Trust is having additional impact on the window market. Energy Trust may be able to claim savings for its role in the market transformation for windows.

3.3 Solar Trade Ally Findings

Demographics

- 8 trade allies responded that they primarily worked with Solar PV and Solar Thermal; one did not answer any solar specific questions and is left out of this analysis.
- Both state and national median firm size for solar trade allies is 2.
- Average of 2.33 FTE employees working specifically on solar electric.
- 63% of solar trade allies have been an Energy Trust trade ally for more than 5 years.
- 50% of solar trade allies get at least half of their revenue from projects involving Energy Trust.
- 63% of solar trade allies expect to increase the proportion of projects involving Energy Trust in 2009.

Solar electric

Percent of solar firms that installed solar electric systems in 2008

Count	8
Yes	75%
No	25%

Three quarters of responding solar trade allies installed solar electric systems in 2008. These allies were asked further questions concerning the size, type, and frequency of their solar PV projects.

Percent of 2008 revenue that came from solar electric systems

	Revenue from Solar Electric
Count	6
0%	0%
1-24%	50%
25-49%	0%
50-74%	33%
75-100%	17%
Don't know	0%

Half of the responding solar allies that installed PV projects in 2008 generated over half of their 2008 revenue from those PV projects, the other half generated 1-24% of their revenue from solar PV. In 2008, solar allies that installed PV projects saw an increase in the percentage of their revenue that came from solar PV compared to 2007.

Percent of 2008 solar electric revenue that came from commercial jobs

	Revenue from Solar Electric
Count	6
0%	33%
1-24%	33%
25-49%	33%
50-74%	0%
75-100%	0%
Don't know	0%

None of the responding trade allies received over half of their solar PV revenue from commercial jobs, compared to 14% last year. One third of solar allies undergoing solar electric projects did not have any commercial solar PV projects in 2008.

Current solar electric backlog

	Solar electric backlog
Count	6
Have no projects currently planned	17%
Have projects to cover work for next month	17%
Have projects to cover work for next 3 months	50%
Have projects to cover work for next 6 months	17%
Have projects to cover work beyond the next 6 months	0%
Don't know	0%

The majority of responding solar PV trade allies have enough work to cover themselves for at least the next 3 months, if not longer. Just 17% had no projects currently planned, compared to 25% last year.

Observed increase in customer inquiries about solar electric in 2008 compared to 2007

	Increase in Solar Electric Inquiries
Count	6
Decrease	0%
No change	33%
1-24%	17%
25-49%	33%
50-74%	17%
75-100%	0%

For the second year in a row the majority of responding solar trade allies observed an increase over the previous year in customer inquiries concerning solar electric projects. Unlike last year, when all solar allies saw an increase in inquires about solar electric, a third of this year's respondents indicated that there was no change. This may indicate that interest in solar PV projects is increasing less rapidly.

Percent of customer inquiries able to respond to in 2008

Count	6
100%, and was able to serve all qualified leads	33%
100%, but selectively served only the highest qualified leads	50%
75%-99%	0%
50%-74%	0%
less than 49%	17%

As with last year, the majority of responding solar allies that installed PV projects were able to respond to all of their customer inquiries. Unlike last year, 1 trade ally indicated that they were able to respond to less than half of the customer inquiries they received.

Average PV Project Size

Median size of 2008 solar electric installations (average kW) was 7 kW for commercial projects and 3 kW for residential projects. These are roughly the same sizes as reported by last year's respondents.

Percent of 2008 PV installations by technology

Count	6
Polycrystalline silicon	26%
Other**	4%
Monocrystalline silicon	69%
Thin films	1%

*Weighted by firm size.
**All "other" was Sanyo's HIT panels, which combine monocrystalline silicon with thin-film amorphous silicon.

This year, monocrystalline silicon was the most commonly installed solar PV technology for survey respondents, followed by polycrystalline silicon. In 2008 there was a shift towards the use of monocrystalline silicon by responding allies, as just 16% of respondents' solar PV projects in 2007 used this technology.

Barriers to Increased Prevalence of Solar Electric Projects

Solar trade allies that installed PV projects in 2008 were asked what they felt were the greatest barriers to selling more solar electric systems. The 6 responses collected are:

- Capital cost (3)
- Competition from less qualified CCB only holders who are NOT licensed electricians
- Energy Trust and Solar Oregon advertising system costs that fall far below our installed costs. Then when you go to give a bid, prospects are bewildered by the conflicting information

- Lack of education seems to be the biggest; most people don't understand or even know how solar works

Solar Water Heating

Just 3 of the responding solar trade allies installed solar water heating systems in 2008. They were asked several questions regarding the size and prevalence of their solar thermal projects.

Percentage of 2008 revenue that came from solar water heating systems

	Revenue from Solar water heating
Count	3
0%	0
1-24%	1
25-49%	1
50-74%	1
75-100%	0
Don't know	0

For those responding solar trade allies that installed solar thermal projects in 2008, revenue generated from these projects made up 1-74% of their total 2008 revenue. Just 1 solar trade ally had commercial solar hot water jobs in 2008, compared to 3 in 2007.

Average size of solar hot water systems installed in 2008
Median size of solar water heating systems (square feet of collectors) installed in 2008 was 56 square feet for residential projects, slightly smaller than the average size of systems installed in 2007. One Trade Ally installed a commercial project of 64 square feet.

3.4 Commercial Trade Ally Findings

Demographics

- 17 trade allies identified themselves as primarily working in commercial programs.
- The median firm size in Oregon for commercial trade allies is 7.
- The national median firm size for commercial trade allies is 8.
- 47% reported that they have been an Energy Trust trade ally for more than 3 years.
- 73% reported that less than 25% of their revenue came from Energy Trust involved projects.
- 94% of commercial trade allies expect to increase the proportion of projects that involve Energy Trust in 2009.

Participated in 2008 Commercial Trade Ally Re-enrollment

Count	17
Yes	65%
No	12%
Don't know	24%

Two thirds of the responding trade allies indicated that they had participated in the 2008 trade ally re-enrollment process.

Effectiveness of commercial trade ally re-enrollment process

	Information Correctly Updated	Renewal Handled Efficiently
Count	11	11
Yes	91%	100%
No	9%	0%
Don't know	0%	0%

The large majority of responding commercial trade allies that participated in the re-enrollment process had their information updated correctly on the website, and all reported that their membership renewal was handled efficiently.

Commercial trade allies were asked for suggestions on how the re-enrollment process could be improved. There were no suggestions.

Top 3 measures installed by commercial Trade Allies in 2008

Count	17
Lighting equipment and installation	53%
HVAC equipment and installation	29%
Building O&M	18%
Building controls	18%
Solar electric	12%
Engineering & design: lighting	6%
Boiler equipment and installation	6%
Architectural services: new construction	6%
Air compressors	6%
Roofing	6%

Lighting equipment was the most common type of equipment installed by responding commercial trade allies, followed by HVAC equipment, building controls, and building O&M.

Primary measure installed in 2008

Count	17
Lighting equipment and installation	53%
HVAC equipment and installation	12%
Other	12%
Boiler equipment and installation	6%
Refrigeration equipment and installation	6%
Architectural services: new construction	6%
Building Construction	6%

As with last year, lighting equipment was the most common primary measure installed by responding commercial trade allies.

Suggestions for Existing/Emerging Commercial Technologies
Commercial trade allies were asked if there were any existing or emerging technologies that they would like to see Energy Trust provide incentives for. Nine responses were collected, including:

- Energy Tune-ups and maintenance
- Air-to-water heat pumps for domestic hot water
- DX-based dehumidification for indoor pools
- LED flood lamps

See Appendix B, Question 35, for specific responses.

Commercial Trade Ally Demographic Summary and Recommendations

Two thirds of responding commercial trade allies underwent the trade ally re-enrollment process, the overwhelming majority of whom thought the process was efficient and accurate. The majority of responding commercial trade allies primarily installed lighting equipment in 2008.

High levels of satisfaction with the commercial trade ally re-enrollment indicate that the process is working effectively. It is recommended that questions concerning the effectiveness of this process be removed from future trade ally surveys.

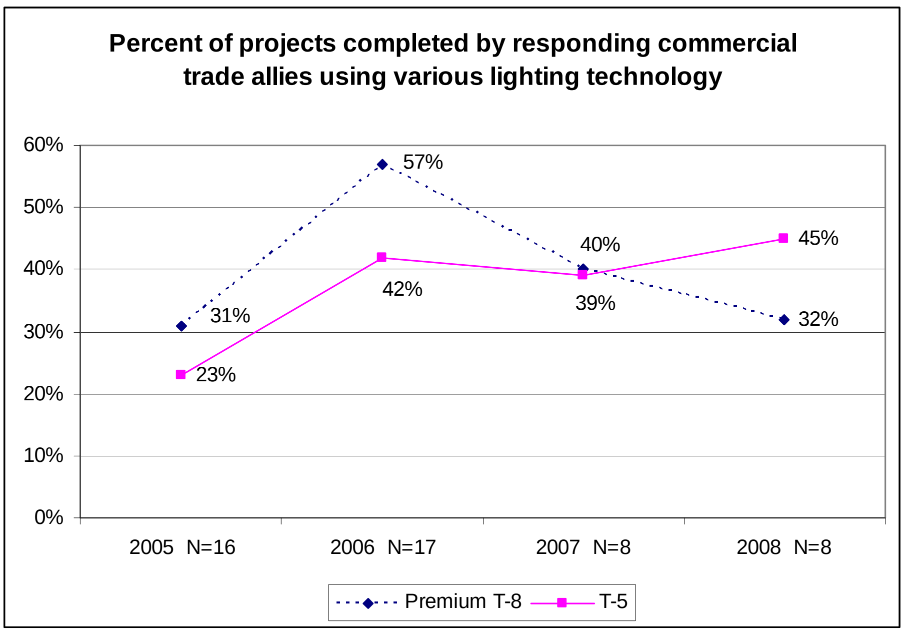
Commercial Lighting Equipment and Installation

Percent of 2008 lighting projects using the following fluorescent technologies (as a percent of installed fixtures)*

Count	8
T-12	2%
Premium T8	32%
T8	21%
T5	45%
Other	0%

*Weighted by firm size.

This year T5s were the most commonly used fluorescent technology for commercial projects, followed by Premium T8s, and the regular T8s. The following chart shows the change in frequency of use of both T5s and Premium T8s as reported by commercial trade allies in the last four trade ally surveys. The graph shows an increasing prevalence of the use of T5s.



Percent of 2008 lighting projects using the following lighting controls*

Count	7
Occupancy sensors	65%
Multi-level switching	0%
EMS	1%
Day lighting/dimming	10%
Sweep	0%

*Weighted by firm size.

The larger majority of commercial lighting projects by responding trade allies in 2008 used occupancy sensors than in 2007. There was a slight increase in the use of day lighting and dimming, accompanied by a decrease in the use of multi-level switching, EMS, and sweep technologies.

Commercial Lighting Summary and Recommendations

A small percentage of 2008 commercial lighting projects done by responding trade allies used lighting controls other than occupancy sensors. It is recommended that Energy Trust move towards emphasizing more advanced, efficient lighting control technology.

Appendix A

Question 5. Other reasons that move customers to carry out energy efficient or renewable energy products.

Residential

- Cash Incentives and Tax Credits available
- Financing
- It all comes down to money when they are on the fence about a project. The incentives give them the extra push.
- People want to feel good about the money they are spending

Other

- Functional Improvement in Window Operations
- I am a realtor, not a contractor

Renewables

- USDA Grants

Question 15. How could the re-enrollment process be improved?

- Allow us to proof our posting on the Internet
- Ensure there are clear instructions for existing Trade Allies and a contact for questions like has been done in the past
- Extend re-enrollment for more than three years and keep programs stable and beneficial to trade-ally
- It would be nice if we could update the details and specialties of our company as it appears on the website ourselves
- It went well for us
- Not sure if this is part of this process, but insurance verification took a confusing turn
- Online application/paperless system
- Processing insurance forms through third party is not working so smoothly. They say they have not received what I have sent
- Send out 1 packet of forms and make sure that they go to just one person. I had to fax my paperwork 3 times. Don't contact my builders, I have done all of their paperwork; people from your office called them and said they didn't get it when I faxed it right in front of my builder
- There was too much feedback from the participating contractors. This made the meeting last longer than necessary. I'd suggest an alternative avenue for this feedback
- We only install windows for the Energy Trust Home Energy Solutions. I would like some specific brochures for window projects. Possibly a single for each phase of upgrade (separate for windows, or duct sealing, or insulation, etc)

Question 19, 31. What features of the Green Street Lending program are of most interest and importance to you?

Residential (Question 19)

- "0" down
- Ability to offer services to clients whom are financially unable
- Capitalizing on the savings benefits for choosing a green lending product
- Customers become more active in their own financing. We, as a company, do not have to pay points for using them
- Ease of application and rates for clients
- Ease of use (2)
- How it is marketed and that is available on commercial

- Long term financing
- Low interest rates (2)
- Saving customers money
- Solar energy
- The fact that a streamlined process is in place helps me present the options to small businesses and investors. The program appears to be well thought out and turnkey

Commercial (Question 31)

- Available money in a recession
- Financing for our small business customers
- Financing projects
- I need more information about this
- Only to pass along to our customers if they are interested in the information

Question 20, 32, 62. What features, or lack of features, of the Green Street Lending program are responsible for your general disinterest?

Residential (Question 20)

- Already set up with a bank who works with my manufacturer to give rebates and special incentives
- Application process, interest rate too high, and fees; simple financing needs to be approved quickly or people will go to their own bank or credit union and get better rates, fees, etc. than Green Street offers
- Customers get better rates elsewhere
- Do not need it
- In all jobs the homeowners have the funding to have the projects completed; if they don't I will inform them of GSL and let them figure it out
- Interest rates aren't impressive (2)
- It is generally a home equity loan; wrong message
- It is not user friendly
- Just starting, will let you know next year
- Lending program not available to lower income customers who actually need assistance
- Our business model does not suit itself to financing options for our customers. It would slow down our process and systems
- Pushing finances on customers is not what I want to do
- Too complicated
- We have better programs for our customers at lower interest rates
- We offer financing and most of our customers do not use it. We may offer it for some bigger jobs; it's nice to have the option
- Window only projects do not qualify (2)

Commercial (Question 32)

- Typical customer doesn't seem to be interested in financing

Solar (Question 62)

- Don't need it
- Fees and interest rates are too high and not competitive

Question 21. What were the top 3 types of equipment/services you installed in 2008 that received Energy Trust incentives?

- Air sealing (3)
- Boilers

- Hope
- Hybrid
- I didn’t install any personally as a realtor, but I recommended them
- I don’t know how to access incentives
- Just started, none yet
- Solar tubes (sun tunnels)
- Tankless Water Heater (6)
- Washer

Question 23. Are there any existing/emerging technologies that you would like to see Energy Trust provide incentives for (residential)?

- 95% gas furnace (2)
- Air sealing; retain/increase current incentives (5)
- All supplies for building new homes
- Blown in duct sealing
- Central zone control systems
- Change the mini-split program!!!!!!!! People do not want to keep their electric wall units!!!!!
- Commissioning for existing heat pumps
- Commercial windows
- Condensing Tankless Water Heaters (95%+)
- Duct sealing; retain/increase current incentives (4)
- Ductless heat pumps
- ECM motors
- Floors
- Fuel cell technology/battery backup
- Gas furnace rebates in avista utility area
- Geothermal (3)
- Geothermal Heat Pumps (2)
- Gray water recycling
- Heat Pump
- Home Performance testing (2)
- HRV/ERV Ventilation Systems (2)
- Hybrid gas/electric systems (2)
- Hybrid Heat Pump/Gas Furnace HVAC systems
- Hybrid heating combo incentive
- Hybrid vehicles
- I like the requirements that exist. I think the U-factor requirements are easily met with any quality window
- In-stream hydro (houseboats)
- Insulated and gasketed ladders and portals
- Large appliances (Fridges?)
- Lighting
- Load calculations and equipment start-up procedures to qualify
- Maintain good incentives for the current programs
- Micro wind
- Moisture controls such as bath fans or dehumidifiers
- No
- Roofing products
- Siding
- Solar Heat Pumps
- Swimming pool heat pumps
- Thermostatic attic fans
- Whole house ventilation

- Windows
- Zone systems (2)

Question 35. Are there any existing/emerging technologies that you would like to see Energy Trust provide incentives for (commercial)?

- Air-to-water heat pumps for domestic hot water
- Air/water lifting equipment
- Automotive exhaust removal equipment
- Controllers with enhanced control
- DX-based dehumidification for indoor pools
- Energy Tune-ups and maintenance
- Improved air piping
- LED flood lamps
- Modulating infrared heaters

Question 72. In your estimation, what is the greatest barrier to sales of solar electric systems by your business?

- Capital cost (3)
- Competition from less qualified CCB only holders who are NOT licensed electricians
- Energy Trust and Solar Oregon advertising system costs that fall far below our installed costs. Then when you go to give a bid, prospects are bewildered by the conflicting information
- Lack of education seems to be the biggest; most people don't understand or even know how solar works

Question 138. Are there any emerging/existing technologies related to gas furnaces that you would like to see Energy Trust provide incentives for?

- 90% and above (2)
- Homeowners will not opt for the higher efficiency without the incentive
- 95% and above (3)
- Air quality products
- ECM motors (2)
- Heat recovery ventilation systems
- Multi-stage

Question 144. What are the reasons for not using commissioning? "Other" write-ins

- Complicates the process and makes it very expensive for owners
- Cost of testing does not outweigh the incentives
- My systems are fired off by factory trained tech, and commissioning is wasteful and timely

Question 152. Did you see any issues with the new residential building codes that went into effect April 2008?

- No (3)
- Venting now is just plain crazy

Question 166. Do you have any comments or suggestions for Energy Trust solar programs?

- Delete the additional meter requirement
- Don't advertise pricing
- Don't do site analysis
- Encourage solar team Olympics on different installer levels
- How does an original ET member get listed towards the front instead of at the back of the approved list
- Increase incentives for solar hot water
- Online form submittals
- Size the grounding conductor as per the NEC
- Thanks again for all your hard work
- Use same forms as ODOE
- Work on passive solar education

Question 169. What reasons contributed to the improvement of your working relationship with Energy Trust?

Solar

- More information easier to locate
- My firm is new to the program. Every interaction has been great; highly professional, personable, correct, precise, enjoyable

Small/Community Wind

- Our core business is now small wind and we work closely with Erin Johnston. She has been patient and responsive to our questions as we continue to learn the processes

Question 170. Which Energy Trust marketing efforts were most effective for your business in 2008?

Solar

- Advertising by showcasing projects
- Basics of solar seminars
- Solar Now
- Unknown-you folks hardly leave the Portland/Salem area

Small/Community Wind

- Energy Trust logos on our marketing materials and apparel

Question 171. Which of your own marketing efforts were most successful in 2008?

Solar

- Educational programs
- Home Shows
- Sol West booth
- Word of mouth

Small/Community Wind

- Booth at the state fair and letters to property owners, realtors, and multifamily property owners

Question 172. Which Energy Trust events were most effective for your business in 2008?

Solar

- Basics of solar seminars

- Green Street Lending
- Renewable Energy Shows
- Ribbon cutting ceremonies of funded ETO projects
- Trade Ally social gathering
- Training workshops

Question 173. What other renewable technologies do you think Energy Trust should be researching?

Solar
- Passive solar
- Wind turbines
- Commercial small scale hydro @ Shriners, VA, OHSU sewer line 17kW

Small/Community Wind
- Hybrid systems

Question 177. How could Energy Trust improve its services to you?

Residential
- Accept applications electronically with PDF attachments
- Answer questions correctly the first time
- Avoid last minute 2 day decisions because ETO has not planned ahead for contractors. We have work scheduled a week or two out. You need to plan better
- Avoid lowering incentives while increasing requirements
- Better communication to Trade Allies
- Bring heat pump rebates in line with gas furnaces
- Clearer documentation of processes
- Contact email/phone number for general contractor inquiries
- Contact the trade ally with application information requests
- Continue to have information meetings
- Continue to integrate incentive processing with ODOE, etc.
- Create a website for duct sealing as promised
- Direct questions to the correct, most knowledgeable person
- Do not contact my builders. If there is something you need get it from me
- Do not decrease incentive program
- Don't change the incentive for gas furnaces (3)
- Don't change the incentive for heat pumps
- Easier forms
- Educate the public on the benefits of an HP
- Eliminate the delays caused by the home inspectors…
- Ensure that Home Energy Reviewers are capable of explaining incentives in a clear manner without combining incentive amounts to give totals; it is hard to explain later how they break down once the client calls the trade ally
- Get back to us quicker with questions (2)
- Have another contractor instead of CSG (2)
- Have companies explain their new products
- Have incentives listed easier for heat pumps/furnaces
- Have more information on Checkme process
- Have seminars in Medford
- Having trouble finding out about the commercial portion of OET
- Home Check is horrible! Worthless

- If the actual dollar amount of cash incentives is only 50% of the budget stop training and stop paying CSG marketing people; use that money for cash incentives paid to the home owners. This way you actually get real energy savings!
- I'd rather request what I need
- Increase ETO advertising in our area
- Increase ETO meetings in our area
- Increase Incentives (7)
- Increase the window and door incentives
- It seems that ETO is passing more work to contractors
- Keep developing creative bonus incentive coupons
- Keep things simple (6)
- Keep up the commitment to assisting contractors on all levels
- Keep website updated
- Key personnel could answer their phones more
- Let the free market work; follow the regional cost effective numbers such as the RTF calculates
- Let windows rebate stand by itself (2)
- Limit the trees it really becomes overwhelming the amount of info we get
- Maintain consistent contractor contact person
- Maintain current incentives for Home Performance testing, Air Sealing, and Duct Sealing
- Make an easy to read/use chart of incentives
- Make the online application accept text
- Meetings on the west side of metro area
- More clarification on incentives and requirements when combining
- More frequent training opportunities for contractor staff (4)
- More marketing to customers
- Notification of meetings at least 2 weeks ahead
- Offer a choice to Trade Allies to deal with a competing provider of incentives and see which offers the best service at the lowest cost to Oregon rate payers
- Offer a rebate to those not performing duct blasting test
- Offer more explanation to realtors on how to get $100 rebate
- Oversight on internal spending
- Process paperwork and cut checks faster (3)
- Program input other than by shout-out at meetings
- Promote duct sealing program in area as promised
- Provide better energy incentive to customers
- Provide better pricing on tools for trade allies
- Provide proper training
- Reduce the mailing of large packets of paper
- Reduce your overhead (3)
- Reduce paperwork (2)
- Remove contractors from individually advertising on site
- Require better training from Trade Allies like NATE certification and remove the check-me type of programs
- Retain MOBE – include societal benefits for cost effectiveness
- See previous statements
- Should not have to monitor website to get information
- Stabilize incentive structure – improve funding as programs grow
- Stay the course!
- Stop in-house cost effective studies – look at BPI or RTF
- They could realize that the quality of CSG employees in the field is much lower than they claim
- Try to understand that not all of our employees are experts at filling out these forms and that our customers sometimes download and send in the applications without our knowledge; so try to be a bit more patient with us when calling to ask for missing information

- Use a multi-tiered rebate program
- We have a terrible time getting credit for CEU classes
- When paperwork is submitted make sure it gets put in the system
- Why do you even bother asking when last years comments are only listed as “responses were not able to be categorized?” They could improve their services to me if the TRUST WAS HONEST! Either it listens to Trade Allies or it does not. When -- tells a room full of people that their comments will be included in the report one would believe that the actual comments would be included. Not just a notation that lists the number of responses without the actual comments
- You do a great job

Commercial
- Expedite incentives when assigned to contractor
- Help me get better at the programs
- Quicker energy audits
- Replace SAIC: done! That will fix it all!

Industrial
- Continue to work to get maximum amount of end money to end users
- Provide us with more leads for audits
- Subsidize positions for additional auditors

Other
- Allow more input into program development
- Help with grants
- Help with websites
- Make incentives for weatherizing old windows
- Will let you know when my house is finished

Question 179. What factors do you think contributed to the deterioration of your working relationship with Energy Trust?

Residential
- ETO decision to kill MOBE program solely on one short term in-house cost effective study, when so many are available with greatly different results. Plus ETO disconcern for the little people. Those families who make too much for CAP assistance, but still can't afford any conservation up-grade. They can barely afford their electric bill and yet they are still asked to pay 3% to ETO
- More paperwork and having to itemize contracts
- New employees coming up to speed, respect that seems to be lacking for the contractors knowledge, and watching a continuation of low incentives in relation to the gross ETO budget; it is not right that so much of the public’s money is siphoned off to program subcontractors
- New people inexperienced or unschooled for interactions
- Taking away rebates when people need to save every dime they can. People are choosing to repair rather than replace. An upgrade now is an 80% furnace
- The fact that the ETO and CSG is not responsive to the Trade Allies’ suggestions or needs
- They make policy decisions in a vacuum! Good ideas can start with others outside of the ETO and CSG!

Question 180. What factors do you think contributed to the improvement of your working relationship with Energy Trust?

Residential
- Attendance at events

- Attending more meetings and becoming more active as a Trade Ally. Becoming involved in the Home Performance Program and having an assigned mentor
- Attending training seminars, meeting more of the Energy Trust team, and becoming more familiar with programs/incentives
- Gaining knowledge as to the assistance that Energy Trust is offering
- Getting to know staff better
- Getting to know the program was a huge improvement. The training and knowledge has made me more aware in providing a full and better service to my clients. It benefits all of us
- Knowing who contacts are for questions in all areas
- More consultants
- More experienced with program and good relations with staff
- Patience and persistence on our part to keep asking questions, and ETO staff willingness to continue education of the program
- Periodic roundtable meetings and e-mail news
- Prompt response to my questions and concerns and flexibility in the staff to respond to our needs and concerns
- Raising the requirement is ok, but you might lose interest if you raise to a level that people will not shoot for
- Surge in high end sales
- The home performance reviews have been great. The homeowners are educated with what needs to be done and communication is clear from day one
- They are always on the cutting edge

Commercial
- ETO employees' customer relation skills
- Familiar staff members
- Getting updates weekly and paperwork about new programs
- More local interaction, met more members of ETO team
- SAIC was the only problem. PECI gets an A+ so far
- The Energy Trust always has great information that is readily available

Question 182. "Additional suggestions for benefits that you would like to see?"

Residential
- Additional consumer benefits for hiring a trade ally
- Continuation of residential gas furnace incentives
- Annual scholarships for BPI training for new staff and annual stipend for cost of new testing equipment
- Be realistic with the heat pump work. Less than 15% of the units we installed last year qualified
- Compensation for all blower door tests
- Compensation for consultations
- Continue the publicizing
- Continued contractor support programs…very important
- Do not get between the Trade Ally contractor and the home owner. The Trust creates much confusion with incorrect information
- Don't spend the consumer money for us to get our own skill building. If you read before, do not let a few contractors use the trade ally website to give outrageous discounts (i.e. 40%) as the ETO is no going to monitor this
- Ease in access to rebate knowledge
- Focus on supporting the existing Home Performance Contractors instead of just increasing the number of them!
- Great job on co-op

- Make it more affordable for Allies to obtain training and tools
- I am very concerned about raising the Energy Trust heat pump requirement to 9.0 HSPF. The main reason for my concern is the limited amount of equipment available. There is a good selection of 8.5 HSPF equipment that is still competitively priced. Therefore by going to 9.0 HSPF, many people who would buy 8.5 may end up buying code HSPF equipment.
- I would like to see more training for Realtors so we could have community or neighborhood meetings to educate folks about things they can do to save energy that won't cost them an arm and a leg
- I wish we could have some designation coordinated with Energy Trust and the 16 hr. star classes we took (Or if there is one, to be made aware)
- It is too soon to decrease the incentives; less than one quarter of the population are aware of the benefits and incentives are helping to increase the awareness of energy efficiency. I'd rather see money go back to the public than spending it on someone's business or publicity. One comfortable, healthy, safe, efficient and sustainable home is a better way to spend money than one big, fat, rich realtor/manager or general contractor
- Make the process easier and less time consuming
- Marketing materials for use in our business as well as home shows, power points, dvds, cds, ect.
- More public advertising
- More suggestions on how to promote the Home Performance Program
- News releases promoting success of local trade allies in area print as promised
- Direct mailing promoting importance of duct/air sealing as promised
- Creating and promoting a direct duct/air sealing website as promised
- Continue to expand Energy Trust awareness and Energy Trust programs throughout Southern Oregon; not just Portland Metro
- Real reporting software
- Recognize the rest of the state outside of Portland
- Reduce cost of programs to certify operation of our heat pump so that we can provide a service for our customer without losing money
- Reduce fees associated with training
- Provide training discounts and other benefits for highly active contractors that do a large share of the work.
- Have primary contacts for large volume contractors that would process paperwork for them and help them as needed
- Reduce and simplify paperwork; why all the marketing questions on rebate forms? HER people can get all that info if you want it
- Contractor training by contractors doing the work
- Pay contractors for training like you pay ESG and others
- Why do contractors get left out on decisions, as if they were the enemy?
- Tried duct blasting but it did not pay or itself. Companies should be allowed to offer a rebate if they do not perform this test; or ETO should provide one person that does it well so that we can build it into the bids. The equipment is expensive; we will look into CheckMe testing in March
- Updates on best/worst practices

Industrial

- Analyze budget and ensure that the maximum amount of money is project focused and going to end-users; limit ETO overhead and bureaucracy

Small/Community Wind

- Wind site evaluation fee rebate program. It is very costly to promote and evaluate small wind customers. Customers are reluctant to pay an evaluation fee. A small evaluation rebate program will help small wind trade allies cover evaluation costs.

Solar

- A greater presence in Southern Oregon

- Educational scholarships for students entering the renewable energy field
- Not Sure

Question 183: If you rely on other trade or professional associations for networking activities, please list these organizations:

Residential

- American Concrete Institute (ACI)
- Associated Builders and Contractors (ABC)
- ARACA
- ARI
- Better Business Bureau (BBB)
- Builders Associations
- Building Performance Institute
- Building Green.com
- Building Science.com
- Business Networking International
- CARRIER
- Community Non-Profit Resource Group (CNRG)
- Designers/architects
- Earth Advantage (3)
- Forest Groove Times
- General Contractors
- Gensco
- Chamber of Commerce (4)
- Home Builders/Remodelers (2)
- Home Builders Associations (6)
- Home Performance Contractors Guild
- HVAC
- I do but that is private information
- Lennox
- LeTip
- NATE
- National Association of Realtors (NAR)
- NWNG
- Oregon Chapter of the Air Conditioning Contractors of America (ORACCA) (4)
- Oregon Coast Community Action (ORCCA)
- Oregon Home Performance Contractor's Association
- Oregon Remodelers Association (ORA) (5)
- Oregon Solar Energy Industries Association (OSEIA) (3)
- Plumbing
- Portland Metropolitan Association of Realtors (PMAR)
- Property Managers
- Real Estate Offices/Realtors (2)
- Refrigeration Service Engineers Society (RSES) (2)
- Renewable Energy Business Network
- Rotary
- Ruud / Comcast
- Salem Electric
- Solar OR
- Steve Campbell for duct sealing
- Thermal Supply

- Trane
- WISE (2)

Commercial
- American Society of Heating, Refrigerating and Air-Conditioning Engineers (ASHRAE)
- Associated General Contractors (AGC) – Oregon Columbia Chapter
- Gil @ EOFF (I believe in reference to EOFF Electric Supply; Gil Amestoy won an ETO top distributor award)
- MPNCDA
- NATA
- National Electrical Contractors Association (NECA) –Oregon Pacific Cascade Chapter
- OADA
- Oregon APEM (Association of Professional Energy Managers)
- Solarworld classes

Industrial
- American Society of Plumbing Engineers (ASPE)
- Association of Facility Engineers (AFE)
- Northwest Energy Efficiency Alliance (NEEA)
- Northwest Food Processors Association (NWFPA)

Small/Community Wind
- North Santiam Chamber of Commerce
- United States Department of Agriculture (USDA)

Solar
- American Solar Energy Society (ASES)
- International Brotherhood of Electrical Workers (IBEW)
- North American Board of Certified Energy Practitioners (NABCEP)
- Oregon Solar Energy Industries Association (OSEIA) (3)
- Solar Energy International
- Solar Oregon (2)

Question 185 ‘Other’ write-ins: Which of the following trades are you interested in networking with?

Residential
- Boilers
- Geothermal (2)
- Ground source heat pumps
- Split systems
- Micro
- Home performance (overall)
- Rain water management
- Suppliers
- Marketing professionals
- Swimming pool
- Tower and sign erection
- WISE

Other
- None right now, maybe after I get some training

Question 187: What can we do to improve the value of the training sessions?

Residential

- Bring in manufacturing representatives
- Bring the training to Southern Oregon (2)
- Closer to home
- Have it online (2)
- Have someone else run them!
- I have been to Trade Ally meetings
- I would like more classes for realtors so they may be more knowledgeable ambassadors to the community for Energy Trust
- More in depth on used homes and apartments
- In person trainings are better than webinars
- More in depth technical training opportunities would help
- Include all information for the program; we left feeling really good about the information but we later found out that we weren't given all of the critical process/program information at the trainings
- Just continue to update us and have discussions from all
- Keep up the frequency of them (3)
- Give advanced notice of trainings; two weeks is not enough
- Lower cost (2)
- Make them more accessible; move them out of downtown
- Clearer documentation process, real reporting software
- Provide an outline of the training day's schedule and the topics that will be covered so that contractors can determine the value of the training (important because they are not free trainings)
- Provide new ideas on air sealing
- Provide options for those who have to travel far distances
- Show up in Medford
- The industry should be driving the training, not the Energy Trust's money. Maybe Energy Trust should provide a very small sponsorship
- The trainers are average at best!
- The training sessions have been very valuable to us
- These are great!
- We have only been to 1 class, it had some good info

Solar

- Create an online training system so we can log on and watch a podcast. This would accomplish many thins: minimize the travel costs and impacts of instructor and students, save instructional material, and make more educational resources available when we need it, etc.
- Don't just explain the paperwork, make us do the paperwork. Supply some examples and have story problems for us to figure out; cut the bull crap and get to the training
- Maybe you need to break up the training between new allies and existing allies. Most of the training that I have been to covers a lot of ground that I have already gone through in earlier sessions
- More in Southern Oregon

Industrial

- Keep program trainings by PDCs active

Renewables

- Promote more web training. It is too expensive to travel to some of the meetings

Other

- Allow more time for informal discussion at the end

Question #188: What specific types of technical training are you interested in?

Residential
- AAMA
- Advanced duct sealing (4)
- Advanced air sealing (4)
- Blower door test certified (2)
- Building science
- Commercial HVAC incentives
- Continue CheckMe training (2)
- Continuing to offer duct sealing/PTCS Testing
- Educate us about 2009 tax credits and Energy Star credits available for used homes/apartments
- Educate us on contractors who offer work on duct sealing and other items
- Energy modeling options and practice
- Energy Star
- Environmental impacts
- Green building seminars in Medford
- Green certification
- Heat pump CheckMe program for state
- Heat pump systems
- Home performance (2)
- HVAC (2)
- I have had installers attend Energy Trust's duct sealing training and other trainings; they told me not to waste my time with ETO training
- Marketing (2)
- None if Energy Trust is sponsoring them; I have been too disappointed in the past to bother with any new ETO sponsored events
- Overall weatherization
- Product options
- Rebates for clients
- Solar electric (4)
- Solar hot water (3)
- Solar racking systems and options
- Tax incentives
- The latest in home building updates
- We can take care of that since the ETO is not responsible legally for what they inspect or provide incentives for
- We stopped going to ETO training and seek better programs
- Window technologies

Commercial
- Lighting
- Maintaining our understanding of the incentives you offer so we can relay that to our clients
- Solar

Industrial
- Case study reviews
- Study methodology

Solar
- Best installer examples, as we are all trying to install the best systems
- Electrical code changes

- Energy Trust requirements and updates
- Grant writing
- Individual manufacturer training: Heliodyn, Shutko, etc.
- Radiant floor/solar thermal
- Show jobs gone right and gone wrong (2)
- Small wind (2)
- Solar electric
- Solar Thermal/Solar Cooling
- Water (hydro)

Other
- Air infiltration and moisture control
- Cost benefit analysis of weatherization
- Getting national certification as a consultant for construction/remodeling

Question 189: Are there other program areas that you'd be interested in receiving training? 'Other' write-ins

Residential
- "Steps to a green home" for home owner and renters
- A list of other trainers doing similar programs
- Advanced air sealing
- Air quality and radon testing
- Commercial energy analysis-existing buildings/schools, etc.
- Federal rebate program information
- Micro hydro
- This should be left to us; spend the money on incentives

Small/Community Wind
- Financing and funding
- Federal energy incentives

Question 193: What topics would you like to see covered at these meetings?

Residential
- All Energy Trust forms available to Trade Allies (pdf)
- Confidence building of ETO
- Creative sales approaches
- Current updates on incentives and policies (6)
- Discussions on what different people find that the public is interested in
- Equipment application comparisons
- Examples of best practices (2)
- Federal tax credits
- Getting people to invest in their homes
- HES incentives-Discussion on the need for homeowners to move forward with EE projects
- Home Energy Reviews – quality control on incentive information that reviewers provide
- Introduction of new programs (4)
- Less paper printing forms
- Marketing (2)
- Nothing except by agenda
- Opportunities and needs for training (4)
- Public education forums

- Program longevity
- Reducing the need for CSG type subs programs
- Review of form and application processes
- Spec book changes and clarification (answers)
- Success stories and challenges
- Sustaining incentive structures to clients and contractor support
- Why are we using a non-Oregon company? (2)

Commercial
- So far agendas have been right on target

Industrial
- Annual PDC Trade Ally Summit; year in review and plan forward
- Program administration and implementation
- Innovative ways to get reluctant customers to commit

Solar
- Suggestions hardly ever get incorporated

Question 194: Do you have any other suggestions regarding the roundtable meetings?

Residential
- Allow time for people to switch between solar and home energy solutions break out sessions
- Be open to contractor feedback; it often feels like you don't hear us (2)
- Better follow up by ETO on Trade Ally questions
- Break out sessions are good
- Downtown would work with validated parking
- Drop them; go to online tutorials on an as needed basis
- Energy Trust needs to talk less and listen more
- Full attendance by ETO staff
- Get input primarily by other means
- Have trade allies submit questions in advance
- Is it cost effective to outsource to CA?
- More advanced notice of the meetings; TWO WEEKS NOTICE IS NOT ENOUGH
- Nope
- Open discussions as to program design of the ETO
- Provide them in our area!
- Reduce time spent on explaining new Energy Trust programs and promotions since we already receive this info by email and mail; save more time for discussion and interaction
- Send the information out first so we can be prepared to ask questions on areas that we don't understand. The meetings would then be more of a revue
- Separate HES, solar, HVAC sessions are good
- Share experiences on the positive and negative responses from the public
- The two I attended were well run and very worthwhile
- Why do we get shut down in our conversations by "oh, that"

Commercial
- Not so broad, more by category

Solar

- You could have general information meetings and then meetings with interested consumers

Question 195: What can Energy Trust do to make attending a roundtable discussion easier?

Residential

- Afternoon meetings; not mornings on the west side of town
- Better notification
- Closer to Roseburg
- Have more in Medford
- Have not had the opportunity until this next meeting (2)
- I am a one man shop so it is difficult for me to get away
- Keep me posted as they have not fit into my schedule yet
- Schedule on evenings and weekends; weekdays are tough to get away from jobs
- Something in the Eugene area. However, if the gas furnace credit is discontinued then we will have no ETO incentives to offer our customers
- The hours typically don't work too well with a small company
- We are just too busy right now to send someone. In the future when we have more staff it would be better, and I am sure we will.
- Without attending I cannot comment

Solar

- Conference call or podcast so that we don't have to drive to a central location

Commercial

- Have these meetings in the Willamette Valley
- Hold one in Coos Bay/North Bend
- I am a new Trade Ally; the February meeting will be my first opportunity and I will be attending
- This is the first year that an invitation was extended

Small/Community Wind

- Schedule lunch roundtables. Most of the sessions are early in the morning and not all trade allies are located near Portland, Bend, or Eugene. Lunch roundtables are easier to schedule and traffic congestion is not a factor.

Other

- Make sure they are publicized
- Provide an agenda; I couldn't find one on your website

Question 196: When receiving information about Energy Trust programs, what types of communication do you prefer? (Select top one or two) 'Other' write-ins

Residential

- Other contractors
- Written materials

Question 197: How frequently do you wish to be contacted concerning Energy Trust news and program updates? 'Other' write-ins

Residential

- As needed (5)
- As soon as they become worthy of knowing
- Every time a change is made (3)
- We wish to be contacted by someone other than the Trust if possible

- Yearly

Solar
- As needed
- Whenever they change

Question 198: From which of the following sources do you receive your information on energy efficiency? Please write in specific sources.

Online

Reside

ntial

- ARI (4)
- Best of building science .com
- BPI
- Building Green (2)
- Building Science
- Department of Energy (DOE) (2)
- Earth Advantage
- ECO Home Magazine
- Ecobroker
- EIA
- Email (2)
- Energy Star (4)
- Energy Trust (8)
- Environmental Leader
- EPA
- Federal tax credit website
- GAMA
- Government sites
- HES
- Manufacturers' and Retailers' sites (5)
- Many
- Miscellaneous websites and discussion boards
- Oregon Department of Energy (ODOE) website (3)
- PGE (3)
- State of Oregon website
- Sustainable Industries e-Bulletins
- Trane.com
- Yes

Commercial
- Electrical Contracting Products magazine online
- Manufacturers' web sites
- NREL
- Numerous websites regarding LED lighting
- Oregon Department of Energy (DOE)
- US Department of Energy (DOE)

Solar
- Energy Trust
- Greenbuilding list serve
- SBIC

Other

- Metro
- Various searches (2)

Small/Community Wind

- We continually research websites and news sources to ensure we are educated on the latest renewable energy developments

Publications

Commercial

- ASHRAE
- Daily Journal of Commerce
- EC&M
- Engineering publications

Residential

- ACCA Contractor Excellence
- ACHR
- Contracting business
- Fine Home Building
- Home Energy Magazine (2)
- Insider
- Magazines
- Mother Earth News
- Natural Home
- Oregonian
- PHC News
- Professional Roofing
- Real Estate Publications
- RSES journal
- SRMI (Krigger/Dorsi)
- The NEWS (2)
- Trade magazines
- Yes (2)

Other

- Books
- Fine Home Building

Solar

- High Performance Buildings
- Home Power Magazine (3)
- SBIC
- Solar Pro
- Solar Today
- Sun, Wind, Energy Magazine

Small/Community Wind

- Agriculture publications
- Oregon Business
- Pacific Power bill inserts

Trade Shows

Residential
- ACI Conference (2)
- AHR
- Greener Homes & Gardens
- Northwest Facilities Expo
- Northwest Solar Expo
- Oregon Remodelers Association
- Trust
- Yes

Commercial
- AGC
- ASHRAE
- Green building
- NECA

Other
- HBA Green Building Week

Solar
- Northwest Solar Expo
- Sol West
- Solar Expo

Small/Community Wind
- We had a booth at the Oregon State Fair and visited all the energy booths

'Other' write-ins

Residential
- Call our suppliers and ask them
- Earth Advantage workshops/trainings
- Energy Trust workshops/trainings
- Manufacturers and sales reps (9)
- Networking
- Northwest Solar Expo
- Paid training
- Pro Solar
- Trade groups such as WISE (2)
- Vendor seminars

Other
- Conferences; ACI for example

Commercial
- Factories

Industrial
- Practical Field Experience – both in studies and in interaction on projects with all stakeholders

Question 203: Which of the following types of articles would be most useful in future newsletters? 'Other' write-ins

Residential

- New policy initiatives
- Top trade allies – how they did it!

Small/Community Wind

- Notifications of process changes and new forms such as an announcement for the new BETC and RETC documents introduced in December 2008

Question 204: What would make the Insider more useful to you?

Residential

- It's a great publication
- Keep it small; too much information is overwhelming and takes time. Good magazine.
- Less incestuous to ETO
- Links to other resources to get more info on specific Insider articles and related topics
- Make sure contract information for WISE group is in each newsletter as this group is actively interested consumers using the utility rate payers' money for the utility rate payers' advantage. Help other Trade Allies understand how to use this program and interface with the ETO and CSG for the benefit of both and the ultimate consumer – the public
- More time to read it!
- Promote program benefits of duct sealing
- Provide a better sense of long-term program directions
- Provide more technical/program assistance
- Regular useful features; could do without fluff pieces about how great ETO programs are
- You spend way too much on the production costs for something that ends up in the garbage

Solar

- Put program updates on PAGE ONE, not buried behind system profiles, trade ally of the month, etc.

Question 206: What pages do you typically visit on the Energy Trust Website? (Select all that apply) 'Other' write-ins

Residential

- Continue to look for a specific site for duct sealing
- Financing

Solar

- Calculator for return on solar electric investment

Question 208: What improvements could we make to the trade ally web pages to make them more valuable to you?

Residential

- Be able to update our company info and specialties ourselves
- Better organization, regular updates, relevant links
- Blog
- Follow up on specific website for duct sealing opportunities
- Get rid of specials offered by contractors; it is contradictory to the whole unbiased list of trade allies
- Interactive forms and online submittals
- Keep them current

- Length of service with ETO
- Make forms accept text – savable versions
- Make it easier to find incentives and all the tax credits
- My clients and I need to be educated how to utilize it
- We find it user friendly as is
- Why ask if you do not share this information with others?
- Word search box on all pages

Solar
- I need to be listed at the front

Small/Community Wind
- Updated forms announcement

Question 210: We're currently re-designing our Website; do you have any suggestions for changes?

Residential
- A page just for forms with a brief description for each form
- A protected part of the site available for contractors that includes more specific information and an opportunity to pose questions and get answers to problems
- Ask consumers questions that would direct them to the best type of contractor
- Blog
- Easier navigation to program details and related ODOE information
- iPhone compatible
- It is sometimes difficult to find specific information on program guidelines or to find a specific piece of information, but I do not have suggestions for improvement
- Keep in mind the older people and the seniors
- Length of service of contractors
- Make it easier for consumers to locate the contractors they need
- Make navigation more intuitive
- Make the Energy Review up front where it will stand out
- Make "Who can participate" bold and upfront
- More direct access
- More emphasis on using a Trade Ally
- More web based calculator tools
- Online submission forms for incentives
- Simplify consumer directed pages
- Stop letting a few contractors use the site for their own advertising!!!
- The layout is off
- Trade Ally profile page
- Web site for duct sealing. Duct sealing is not typically an HVAC or an insulation contractor's function. Duct sealing is a separate function and separate business endeavor
- Why spend money on something that works well? Keep good incentives to the paying customers

Small/Community Wind
- Announcements of any changes in processes, forms, etc.

Commercial
- I like it the way it is

Question 211: Do you have any additional comments or suggestions for Energy Trust?

Residential

- Again with regional standards
- Broaden the funding base
- Continued incentives to customers and contractor support (2)
- Cut internal spending/waste
- Do not decrease customer incentives when the economy is getting worse (2)
- Do not say contractors are happy in 2008 as I know contractors that filled out the 2008 survey
- Don't lower incentives while increasing program requirements
- Do uniform inspections; there is a feeling this is not always the case
- Eliminate the test for heat pumps
- Encourage Trade Allies to serve a few hours of community service in exchange for continuing training
- Focus on deep energy savings in each home; you won't be going back
- Give homeowners a choice between a contractor audit and then passing the saving of the cost for the auditor as an incentive
- Give more advance notice of meetings
- Had to pay out rebates because we thought we were new construction certified
- I feel like we're always searching for information that ETO didn't give us as a crucial part of their varied programs
- I think the planned 2009 pilot program between the City of the Energy trust where the ETO is the contractor and selects the contractor and basically the price it is to be done for- is wrong. It will start a precedence that hurts the Oregon contractor pool. It is un-American, short sited, and very destructive to the free market costs that have to be used to determine quality work. The tax payers' dollars or the rate payers have always been in some way connected with programs so why now make this a closed market? The federal government tax credit programs allow the work to be done by whoever is the one selected by the consumer; not selected by other government agencies or do-gooders that have never lifted a hammer. And it is not stimulating the economy if a few contractors want to work for very few dollars which is where I see this going. Or a select few that get 'big dollars and hint -hint -we look the other way. The fact there was no contractor input or public meetings related to this program implementation tells me that there was no intent of ever consulting the contractors as the ETO and the City are making their own socialist policies and they exactly what the majority of contractors would say. Plus we contractors that have been around a long time know that once this type of program is shown to succeed (who could prove otherwise –right?), why not do this to all ETO or state programs? I bet the CSG/ETO /city workers involved in administering and inspecting the programs are not taking less for their services!!!
- I want a single source for incentives, not just for gas/electric
- I wish you all success
- I would love to be better trained and more knowledgeable so that I can share the word about saving energy in my community
- If you reduce incentives for duct testing and duct sealing the number of duct jobs will drop drastically
- In case it hasn't come through, Home Check is a disaster
- Include societal benefits in cost effective studies
- Include survey results in publications and the website
- Job leads
- Keep educating the public
- Let egress be part of building code not energy code
- Lower the overhead of ETO, CSG and give more cash incentives to home owners (3)
- Make the process less costly
- Make the process simpler (2)
- Marketing budget for promotions
- Medford is in Oregon!!!
- Offer more incentives for new construction
- Please return phone calls and answer questions in a timely manner (2)

- Provide a home performance incentive
- Provide all program information up front before Trade Allies enter a program
- Quit overspending on office space (3)
- Remember who your actual customer is; not one layer up, but the end user
- Review and compare more established cost effective studies
- Seek information from industry leaders
- Simple, easy, low cost
- Simplify paperwork in all areas
- Speed up the refund process to customers
- Spend more time and energy on the rest of Oregon outside of Portland
- Stop using so much rate payer funds to pay for marketing that is not needed (2)
- Tell the truth about that survey
- The Account Managers for Home Performance do a tremendous job training in the field and putting fires out in the office. It would be great to see them be able to put more effort towards the program and developing Trade Allies rather than spending so much time with process improvement and trying to follow behind cleaning up messes that could have been avoided with proper training and information for all of us
- The incentives are a huge deciding factor for our customers when moving forward with work
- The Trust is doing great work! (2)
- Treat the Trust as if it were an actual business
- Use the resources on education, not on more marketing
- Use contractors to develop best programs
- When rolling out a new program, please create a flowchart or some process chart of what the customer will experience in the program and what is expected of the contractor and ETO. Check to be sure that all pieces of the puzzle are there and that they don't duplicate efforts and that it makes "sense". Make sure all crucial points are defined, and the process is clear and streamlined BEFORE implementing it. A lot of critical information was not included in several of our trainings; it reflects poorly on us and ETO when we miss a form or delay an incentive because we were mis-trained.
- Why are these comments in one line boxes?
- Work to keep the contractors you have; more contractors does not mean better quality of work
- You are doing a great job and a service for now and the future

Commercial

- I was disappointed at the meeting regarding lighting. The person who spoke about LED lighting did not do his research, and was very negative
- Keep up the great work

Industrial

- Has been a successful vehicle for moving customers into more efficient Compressed Air Systems since its inception
- Customer focus: getting the most money to customers when they are upgrading a full system is a philosophy we'd like to see continued rather than a trend that increasingly rations funds
- Industrial program is a net job creator/saver in our economy and should continue to be well-funded; consistently and indefinitely. It works and its results are easily verifiable
- Stability/consistency in funding the industrial efficiency program is a good standard to manage toward; this seems to have been achieved

Solar

- I'm glad you are here doing your job well
- Keep up the good work. You are doing an amazing job!
- The Energy Trust is doing a great job in helping to get the word of solar out. We like the program and would not be installing nearly so many systems without the Energy Trust. However, much

could be improved. Our year suffered because of two reasons; ETO site analysis and advertising prices significantly lower than we are able to install things for

Small/Community Wind

- Development of pre-designed ads announcing current promotions that the Trade Allies can personalize with their contact information
- A marketing plan template designed around the quarterly promotions

Other

- I would like to get to know the organization better before making any suggestions

Appendix B

Specific trades that allies would like to network with

	Residential	Commercial	Solar	Small/Community Wind	Total
Count	61	13	7	2	83
Residential HVAC	54%	16%	29%	50%	48%
Residential insulation	51%	0%	43%	0%	43%
Residential windows	39%	0%	29%	0%	33%
Residential duct sealing and duct insulation	44%	0%	29%	50%	39%
New site-built home	21%	31%	57%	0%	28%
New manufactured home	5%	8%	29%	0%	7%
Commercial HVAC equipment and installation	18%	39%	43%	0%	23%
Commercial boiler or gas furnace equipment and installation	12%	16%	29%	0%	13%
Food service equipment	0%	16%	14%	0%	4%
Commercial lighting equipment and installation	8%	39%	43%	0%	16%
Commercial refrigeration equipment and installation	2%	8%	43%	0%	6%
Building Controls	5%	31%	43%	50%	13%
Building O&M	3%	8%	29%	0%	6%
Commercial windows	5%	0%	14%	0%	5%
Commercial building construction	13%	31%	43%	50%	19%
Engineering & design	13%	15%	57%	50%	18%
Architectural Services	12%	15%	43%	50%	16%
Solar electric	31%	39%	57%	0%	35%
Solar water heating	23%	15%	43%	0%	31%
Wind energy	20%	15%	71%	0%	24%
Industrial lighting	0%	23%	43%	0%	7%
Industrial motors	0%	0%	29%	50%	4%
Industrial HVAC	7%	23%	29%	0%	11%
Industrial compressed air systems	0%	15%	29%	50%	6%
Industrial refrigeration systems	0%	0%	29%	0%	2%
Pump and fan systems	3%	0%	14%	50%	5%
Irrigation systems	3%	8%	14%	0%	5%
Process controls and improvements	2%	0%	14%	0%	2%
Real estate professionals	46%	15%	86%	50%	47%