research/into/action inc

Final Report

2011 Energy Trust Trade Ally Survey

Prepared For:

Energy Trust of Oregon

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EXECUTIVE SUMMARY

This report summarizes the results of the 2011 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 seventh year, the survey is still focused on feedback but also includes a program/measure-specific market research component introduced in 2010. 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 2011[1] Trade Ally Survey was sent via email to 1,404 trade allies when it was launched on April 14, 2011. Links to the survey also were provided on the Energy Trust website and in the *Insider* newsletter. The survey was closed May 2, 2011 with 214 complete surveys by unique respondents – 175 in response to the email and 39 completed through the links to the website and newsletter. The response rate to the email was 12.5%, which fell short of last year's rate of 18%, but exceeded previous years' rates.

About 18% of the completed surveys were submitted via the links to the website and newsletter. It is not known, however, how many of those respondents would have completed the survey in response to the email invitation if they had not done it via web link, and so we cannot determine whether or how much the addition of those channels added to the total volume of completions.

Of the completed surveys, 22 were removed from the data set because of more than one respondent representing the same company, the same respondent completing the survey multiple times, or a respondent had not participated in Energy Trust programs in 2010. The final analysis included 192 responses.

KEY FINDINGS & RECOMMENDATIONS

General Trade Ally Findings

Of the 192 respondents representing unique firms, 105 reported themselves as mainly working in the Residential program, 32 in the Commercial, 8 in Industrial, 20 in Solar PV, and 9 in other renewables. 18 respondents categorized themselves as 'Other'.

[1] To clarify confusion with the nomenclature, the 2011 report covers the 2010 program year.

General Program Demographics

Nearly half of trade allies indicated that they have been working with Energy Trust for more than five years, 7% for less than one year. Twenty-seven percent of respondents received over half of their revenues from projects involving Energy Trust incentives, and half of respondents expect an increase in the proportion of projects that involve Energy Trust in 2011.

Program Interaction

Ratings of the influence of Energy Trust incentives in moving projects forward differed by sector. Solar PV and commercial sector trade allies reported the highest influence ratings.

Trade allies reported a high level of involvement in customer paperwork. Three-fourths of trade allies reported completing most or all of the paperwork for their customers at least 75% of the time. Top management and administrative staff are most involved in completing the paperwork in most sectors; the most common reason cited for not completing customer paperwork was that the customer preferred to do it.

Oregon Tax Credits, Green Streets, and EBIX

Trade ally awareness of the Oregon Business and Residential Energy Tax Credits is near universal, with only 11% of responding trade allies being unaware of the tax credits. Energy Trust's ongoing training in regards to the BETC/RETC appears to have had an impact.

Energy Trust works with Umpqua Bank to offer financing to residential and commercial customers through the Green Street lending program. A majority of trade allies (69%) are aware of the program and 18% of all trade allies actively market it.

Recommendation

➡ As a large number of trade allies are familiar with this program and many actively offer it, it is recommended that Energy Trust allow these services to continue.

EBIX is a service that Energy Trust uses to track trade ally insurance status. Energy Trust anticipates moving to an in-house tracking system once the new Integrated Solutions Program (ISP) has been implemented in 2011. About three-fifths of trade allies reported having had interactions with EBIX in the past year, of whom just over two-fifths reported some complaint.

Energy Trust Support

Trade allies were asked to rate their interest in various types of Energy Trust support. Trade allies indicated interest in cooperative advertising (72% were "interested" or "very interested") and in furthering their knowledge of energy efficiency products, services, and programs, especially in their own trade, through regular updates, conferences, and workshops (the percentage indicating "interested" or "very interested" ranged from 48% to 59%).

Training

Over two-thirds of responding trade allies reported that they had attended an Energy Trust sponsored training session in 2010 or 2011, and over 60% of these trade allies found the trainings ”valuable” or ”very valuable.”. When asked what specific areas they would most like training in, the most common responses were savings calculation tools, business development, and communicating the value of energy efficiency to customers. Three-fourths of trade allies indicated that they would be “likely” or “extremely likely” to attend webinar training.

Recommendation

- Continue training programs that support trade allies’ efforts to work with the programs and market their services to customers.

Roundtable Discussions

Two-thirds of respondents indicated that they had attended a roundtable discussion (80% in past year) and 48% reported that the events were either “useful” or “very useful.” Seventy percent of trade allies supported trade-specific roundtables.

Recommendations

- Energy Trust should continue to hold regular roundtables throughout the state. Regular meetings with clear agendas and timely notification should provide trade allies sufficient information to schedule the meeting.
- Clearly delineate roundtables by program and consider more specific topics to allow trade allies to attend those portions most relevant to their business
- Continue to develop and expand web-based roundtables.

Communication & the Insider *Newsletter*

A majority of responding trade allies prefer to be notified about program updates via email from program staff at least once a month. Seventy-nine percent of responding Trade Allies reported they receive the *Insider* newsletter, and a majority (70%) found it to be at least ”somewhat useful.” Over half of respondents who receive the *Insider* report reading complete feature articles and following links at least half the time. The topics rated most useful include Energy Trust program updates and common problems and solutions. A majority of trade allies (66%) who reported receiving the *Insider* said that its advance notice of program changes was sufficient.

Recommendations

- Continue offering the Insider as an electronic publication.

➡ Continue to utilize email and other electronic communication avenues to communicate with trade allies.

Website

Nearly all respondents (92%) reported they visit Energy Trust's website at least once a month, most often visiting the program forms and incentives pages. Ratings of the ease of navigation continue to be low, with less than half (38%) of respondents rating it "easy" or "very easy." Roughly two-thirds of respondents were aware of the trade ally portal and the "for allies" link on the website. Over half of respondents said they would "probably" or "definitely" use an Energy Trust laptop or Smartphone app.

Recommendations

➡ Attempts should be made to increase awareness of trade ally-specific resources on the website, and to increase their ease of navigation.

➡ In further efforts to upgrade the website a priority should be given to the forms and program incentives pages.

PROGRAM SATISFACTION

Overall satisfaction levels of respondents reported by trade allies remained relatively stable in both the efficiency and renewable energy sectors.

Table 1: Trade Ally Satisfaction with Energy Trust

ELEMENT	SATISFACTION RATING OF '4' OR '5' ON FIVE-POINT SCALE			
	ENERGY EFFICIENCY		RENEWABLES	
	2011 (n = 145)	2010 (n = 217)	2011 (n = 27)	2010 (n = 38)
Overall satisfaction with Energy Trust	74%	73%	78%	79%
Knowledge of Energy Trust programs and procedures	80%	80%	85%	84%
Interactions with Energy Trust staff	77%	77%	81%	87%
Quality assurance/quality control process	68%	na	na	na
Quality of responses to your requests	68%	74%	81%	86%
Response times to requests for information	66%	na	70%	72%
Response times to requests for assistance on forms	57%	73%	na	na
Turnaround time for incentive application/approval of paperwork	56%	61%	67%	55%
Incentive payment processing time	53%	59%	48%	53%

ELEMENT	SATISFACTION RATING OF '4' OR '5' ON FIVE-POINT SCALE			
	ENERGY EFFICIENCY		RENEWABLES	
	2011 (n = 145)	2010 (n = 217)	2011 (n = 27)	2010 (n = 38)
Quality of your relationship with Energy Trust inspectors	na	na	63%	75%
Scheduling of Energy Trust inspections	na	na	62%	na
Quality of Energy Trust inspections	na	na	58%	66%

Note: "na" indicates "not asked."

In the area of payment processing and program paperwork, approval ratings remain relatively low, especially in comparison with overall approval ratings. Energy Trust continues to examine way to improve processing ease. Specific forms that typically have longer processing times are being examined to determine how the paperwork can be simplified. Finally, Energy Trust is planning on developing metrics, once the new ISP is implemented in 2011, to track processing times better. Energy Trust is attempting to elicit more detailed and specific trade ally feedback on program paperwork to assist it in address this issue.

RESIDENTIAL AND COMMERCIAL PRODUCT FINDINGS

In the residential market trade allies' responses have indicated that some markets are continuing to change. In the heat pump market, the majority (72%) of heat pumps being installed are ≥9.0 Heating Seasonal Performance Factor (HSPF), up from 38% in 2008. The windows market is also continuing to shift, with a vast majority of windows installed having a U factor of 0.30 or better. The reported availability and contractor knowledge of highly efficient windows (U < 0.26) has also increased.

In the commercial and industrial markets, 26 lighting trade allies indicated that high performance T8s, T5s and CFLs made up the majority of their installations. Additionally, LED fixtures are continuing to become more prevalent in the market. Room for improvement continues to exist in the area of controls: many trade allies report installing occupancy sensors in some of their projects, but far fewer report regularly installing other types of lighting controls.

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MEMO

Date: September 22, 2011

To: Board of Directors

From: Tom Beverly, Trade Ally Network Manager

Philipp Degens, Evaluation Manager

Subject: Staff Response for the 2011 Trade Ally Survey

Energy Trust continues to see value in surveying its trade allies on an annual basis. The survey provides a venue from which to gauge how well Energy Trust communicates and interacts with its trade allies. It also offers trade allies a vehicle for providing feedback.

It is clear from the survey responses that Energy Trust has worked with the majority of the trade allies surveyed for over three years, and nearly half for over five years. Also, most of the trade ally respondents plan to continue working with Energy Trust in the future. Energy Trust needs to consider trade ally relationships as long-term in nature and continue efforts to enhance this working relationship.

A greater emphasis will be placed on viewing program paperwork from the trade ally perspective as a result of the survey. Many of the trade allies reported that they complete most of the paperwork on behalf of their customers. As high volume form completers, trade allies can provide important feedback on changes Energy Trust is considering to improve the usability of current forms. Also providing more training and easier access to forms for trade allies will have an impact on processing times for incentives. Trade allies are more familiar with our forms, and as a result, turn in fewer forms with incomplete information.

Based on survey feedback, Energy Trust will continue electronic communications to trade allies via Insider, provide more frequent program-specific emails, offer additional training to assist trade allies in selling projects using new techniques and further refine the regular meetings and training we offer to support trade allies as a sales force for Energy Trust.

Energy Trust staff were pleased to see that the bulk of trade allies surveyed prefer receiving program communications via electronic media (email, webinars etc.). These communication channels are inexpensive and offer flexibility. Energy Trust will continue employing techniques that allow us to cost-effectively and efficiently communicate about Energy Trust offerings, updates and program-technical requirements to trade allies.

1 INTRODUCTION

Energy Trust of Oregon's trade allies are often the voice of Energy Trust to homeowners and business owners across their territory. Trade allies install the energy efficiency and renewable energy measures that yield energy savings for Energy Trust. It is critical that Energy Trust obtain feedback from trade allies about what aspects of working with Energy Trust are going well and what areas need improvement. Therefore, Energy Trust conducts an annual survey of its trade allies to obtain feedback from trade allies and to learn about the marketplace for energy efficiency and renewal energy measures.

In February 2011, Energy Trust of Oregon selected Research Into Action Inc. to assist with the design and implementation of the 2011 Trade Ally survey. Specifically, Research Into Action was contracted to do the following:

- Review and update the survey design
- Review and improve the implementation methodology
- Analyze the survey results and issue a report on the survey.

This report provides results from the 2011 Trade Ally survey and showcases the feedback we gleaned from trade allies across the residential, commercial, and industrial sectors. As part of Energy Trust's continuous improvement approach, these results will help Energy Trust identify successful approaches to working with trade allies and improve upon other approaches that are not as successful.

2 DESCRIPTION OF SURVEY DATA

This section characterizes the survey responses, including the response rates and dispositions and the characteristics (demographics and tenure as a trade ally) of the survey respondents.

RESPONSE RATE AND SELECTION CRITERIA

The 2011 Trade Ally Survey was fielded via email to 1,404 trade allies when it was launched on April 13, 2011, with a reminder email sent on Aril 28 2011. Trade allies also could respond to the survey via links placed on the Energy Trust website and in the *Insider* newsletter. The survey was closed May 2, 2011 with 232 submitted surveys.

Table 2 shows the final disposition of the survey. Out of the 232 surveys submitted, 214 were submitted by unique respondents, of whom 175 completed the survey in response to the email solicitation. This results in a response rate of 12.5%. We limited the number of responses to one per company, selecting respondents based on survey completeness and seniority (in all cases, these two criteria identified the same respondent.) We also excluded respondents who indicated, either in open-ended or closed-ended responses, that they did not work with Energy Trust in 2010.

Table 2: Final Disposition

DISPOSITION	COUNT		
	EMAIL	WEB LINK[1]	TOTAL
Trade Allies Solicited	1,404	n/a	1,404
Surveys Submitted	189	43	232
Surveys Completed[2]	178	40	218
Unique Respondents[3]	175	39	214
Unique Firms[3]	175	35	210
Unique Firms Participating in Energy Trust Programs in 2010	164	28	192

[1] Responded via either the Energy Trust website or the *Insider* newsletter link.

[2] Responded to at least one close-ended question.

[3] Some respondents did not provide identifying information or company name. For those respondents, the only way to identify repetitions was by IP address; if the IP address was unique, we assumed that the respondent and company were unique.

The resulting data set obtained for the survey evaluation contains 192 responses, each from a different respondent and company, and each participating in Energy Trust programs in 2010.

Although 192 respondents completed the 2011 survey, not all respondents answered all questions; many respondents skipped questions or sections. The number of respondents is provided throughout the report, and will refer to the number of respondents to a given question or section, not the number of overall survey responses.

Furthermore, for consistency, responses are provided as percentages throughout the report, even when the number of respondents is small. Care should be used in interpreting the responses when the overall number of respondents is small.

WEIGHTING METHODS

To more accurately characterize the market penetration of energy efficiency technologies, we weighted respondents' answers to relevant survey items by the number of people employed by their firm. We used number of Oregon employees (or the number of Washington employees, if no Oregon number was supplied) to calculate weights.[2] Number of employees was captured as a categorical rather than a continuous variable, with each category indicating a range; for each respondent, we took the midpoint of the selected range to represent the number of employees in that respondent's firm.

We normalized the weights separately for each question based on the firm size of the respondents. We calculated the normalized weights based on the following equation:

$$Weight_i = e_i * \frac{n}{\sum_{x=1}^{n} e_x}$$

e = number of employees

n = sample size

This weighting methodology assumes that the distribution of firm sizes in the sample is representative of the population distribution. Due to the very large range of employees, (from 1 to 375) and the small number of respondents, this weighting methodology also essentially excludes the smallest firms from analysis. We note items in which large respondents have a particularly large effect on the weighted results.

RESPONDENT CHARACTERISTICS

We evaluated a total of 192 responses to the 2011 Trade Ally Survey. Demographic data reported on these responding trade allies include:

- Sectors represented
- Firm size

[2] One respondent did not provide the number of employees, and was omitted from all weighted analyses.

- Tenure as a trade ally
- Level of involvement with Energy Trust

Sectors Represented

We attempted to classify each company as being from a certain sector based on their responses to several questions about the primary type of work they do for Energy Trust. As Table 3 shows, we were able to classify all but 18 respondents by sector. Those 18 did not identify a specific sector or provide sufficiently detailed responses to classify them into a single sector.

Table 3: Sectors Represented

CATEGORY	SECTOR	NUMBER OF COMPANIES	PERCENT OF COMPANIES
Energy Efficiency	Residential	105	55%
	Commercial	32	17%
	Industrial	8	4%
Renewables	Solar PV	20	10%
	Other Renewables (Solar Thermal, Wind, Other)	9	5%
Other/No answer[1]		18	9%

[1] Did not identify a specific sector or provide sufficiently detailed responses to classify them into a single sector.

Sectors are organized into larger categories depending on whether the respondent participated primarily in energy efficiency or in renewables programs. The commercial sector includes respondents who identified their primary work as "multifamily buildings," and the industrial sector includes respondents who identified their primary work as "agricultural/industrial."

Because of the small number of respondents in the industrial and Other Renewables sectors, it would be misleading to show the distribution of responses for those sectors as percentages. Therefore, in tables comparing the distribution of responses across sectors, we combined the commercial and industrial sectors (shown as C&I)[3] and included responses for the Other Renewables sector only in the totals. However, we do mention notable findings for these sectors in the text. The "other/no answer" responses are also omitted from comparisons by sector, but are included in the total.

[3] Generally, the responses from industrial respondents were very similar to those from commercial ones.

Firm Size

In the 2011 Trade Ally survey, we used a 10-point labeled scale to ask companies about the number of people they employ regionally (in Oregon and in SW Washington) and nationally. There seems to have been some confusion over the format of these questions: while only one respondent failed to answer this question entirely, only 40% of respondents (77 firms) indicated the number of employees in the US overall. Some companies operating entirely in Oregon or SW Washington may have thought this question was optional.

Table 4 shows the number of people employed in Oregon at each company. Four respondents did not indicate their firm's number of employees in Oregon: it is unclear whether these respondents did not employ people in Oregon, or simply neglected to answer the question. (These respondents reported having employees in SW Washington.) Forty-three respondents (23%) indicated that all of their employees are in Oregon.

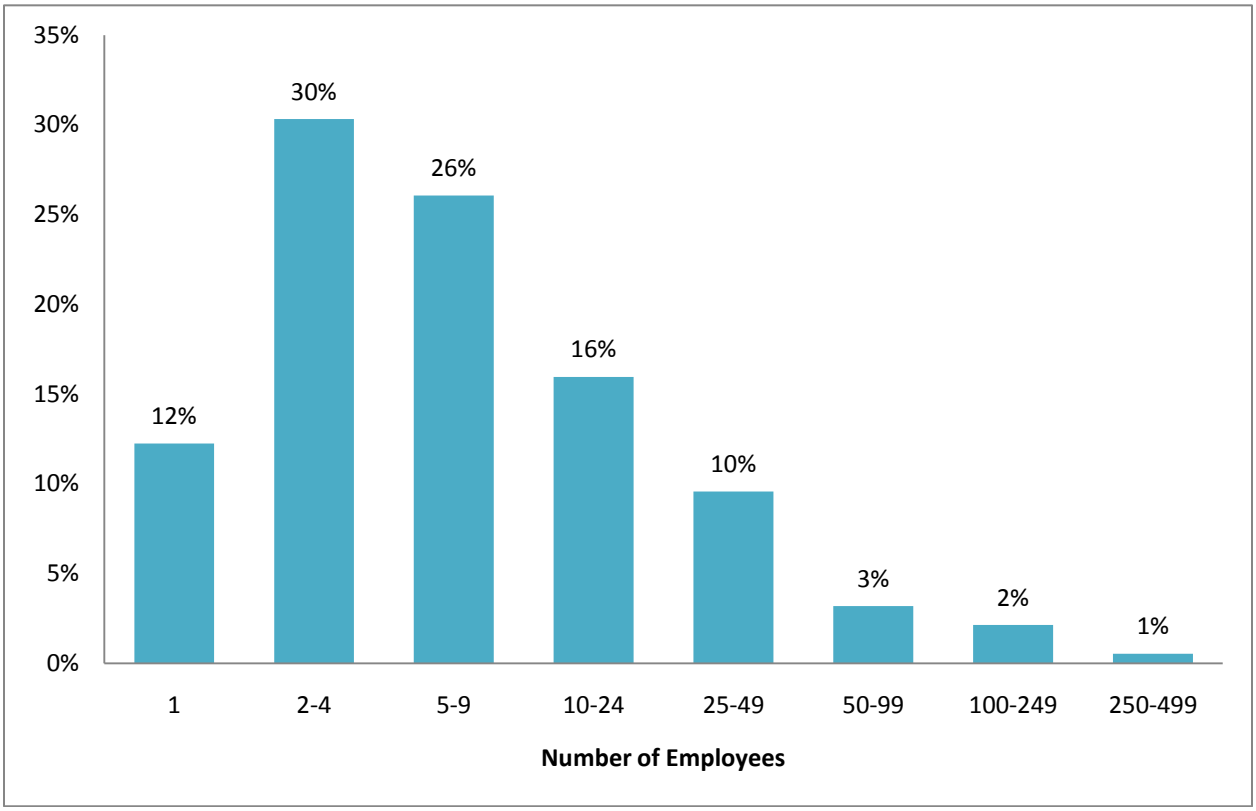
Table 4: Number of Oregon Employees by Sector

RANGE OF EMPLOYEES	SECTOR			ALL RESPONDENTS (*n* =188)
	RESIDENTIAL (*n* = 101)	C & I (*n* = 40)	SOLAR PV (*n* =20)	
1	14%	10%	15%	12%
2 to 4	28%	30%	40%	30%
5 to 9	28%	28%	25%	26%
10 to 24	18%	10%	10%	16%
25 to 49	9%	8%	10%	10%
50 to 99	3%	8%	0%	3%
100 to 249	1%	5%	0%	2%
250 to 499	0%	3%	0%	1%

Of the nine respondents in the Other Renewables sector, four reported two to four employees, three reported five to nine, and one each reported 10 to 24 and 25 to 49. This distribution is similar to that for Solar PV.

Forty-five respondents (24%) reported that their firm employed people in SW Washington (Figure 1). Only five of these companies reported having 10 or more SW Washington employees

Figure 1: Number of SW Washington Employees (*n* = 45)



We used the reported number of Oregon employees to classify each firm as large or small. We selected a cutoff that created the most equal sized groupings in each sector. We classified each firms as small if they reported four or fewer Oregon employees and large if they reported at least five Oregon employees. Table 5 shows the proportion of small and large firms in each sector.

Table 5: Size of Firms by Sector

SIZE	SECTOR			ALL RESPONDENTS (*n* = 188)
	RESIDENTIAL (*n* = 101)	C & I (*n* = 40)	SOLAR PV (*n* = 20)	
Small (4 or fewer)	42%	40%	55%	43%
Large (5 or more)	58%	60%	45%	57%

Four of the Other Renewables firms were classified as small, and the other five were large.

Tenure as a Trade Ally

We asked trade allies how long they have been working with Energy Trust. Almost half of the trade allies surveyed have been working with Energy Trust for more than five years (Table 6).

Table 6: Years Working with Energy Trust

TENURE OF ENERGY TRUST AFFILIATION	SECTOR			ALL RESPONDENTS (*n* = 182)
	RESIDENTIAL (*n* = 103)	C & I (*n* = 40)	SOLAR PV (*n* = 20)	
Less than 1 year	6%	3%	15%	7%
1 to 2 years	27%	20%	20%	24%
3 to 4 years	18%	23%	25%	21%
5 or more years	49%	55%	40%	47%

Responses from the Other Renewables sector were distributed similarly to the other sectors, with none reported less than one year, one reporting one to two years, three reporting three to four years, and five reporting five or more years.

These results continue a trend identified in the 2010 survey. In that survey, 15% of respondents identified themselves as new trade allies, compared with 25% in 2009, indicating a decrease in the proportion of new trade allies. The figure of 7% in the current survey shows a continuing decrease in the proportion of new trade allies, which may indicate market saturation. Note that the general trend occurred in each sector except the commercial and Solar PV sectors.

Summary of Demographics Findings

Although there continues to be an influx of new trade allies, especially in the residential and solar electric sectors, the number of new trade allies is decreasing. Just under half of responding trade allies (47%) have now been working with Energy Trust for more than 5 years. The respondents indicate a reasonably high level of involvement with Energy Trust, with almost half (48%) expecting an increase in the proportion of their jobs that involve Energy Trust next year.

3 TRADE ALLY INTERACTIONS WITH THE MARKET

This section presents and summarizes survey responses relating to the various Energy Trust services that support trade allies in the delivery of their services to the market. It covers the following topics:

- Impacts of working with Energy Trust.
- Program paperwork.
- Familiarity with and use of tax credits.
- Use of financing services.
- Evaluation of marketing channels.
- Experience with the NW Natural Washington expansion.

All questions in the above categories were asked of all trade allies, regardless of sector. The discussion presents the results broken down by sector as well as for all respondents combined.

Responses to sector-specific questions are presented *Section 6, SECTOR.*

IMPACTS OF WORKING WITH ENERGY TRUST

We assessed the impacts of trade ally involvement with Energy Trust in several ways:

- The percent of 2010 revenues from projects receiving Energy Trust incentives.
- The economic impact of being a trade ally.
- Expectations for change in the proportion of their projects that involve Energy Trust in 2011.
- The influence of Energy Trust incentives on moving energy efficiency and renewable energy projects forward.

2010 Revenue from Projects Receiving Energy Trust Incentives

When asked to estimate the percentage of their company's 2010 Oregon revenues that came from jobs participating in Energy Trust programs, most trade allies (72%) indicated that it was less than half of their revenue (Table 7). In this year's survey, trade allies working in the two renewable sectors derived the largest portions of their revenues from Energy Trust incentives,

with just under half of them indicating that at least 50% of their 2010 revenue came from projects receiving Energy Trust incentives. (Responses for Other Renewables were distributed similarly to those for Solar PV.)

Table 7: Percent of 2010 Revenues from Projects Receiving Energy Trust Incentives

SECTOR	PERCENT OF INCOME					
	0%	1%-24%	25%-49%	50%-74%	75%-99%	100%
Residential (*n* = 102)	4%	45%	22%	13%	14%	3%
C & I (*n* = 39)	2%	61%	21%	7%	5%	2%
Solar PV (*n* = 20)	0%	45%	10%	20%	20%	5%
All Respondents (N = 187)	4%	51%	18%	12%	12%	3%

Table 8 compares the percent of revenue from Energy Trust projects over the past four years. No significant differences were found across the past two surveys.

Table 8: Percent of Revenues from Projects Receiving Energy Trust Incentives

SURVEY YEAR	0%	1%-24%	25%-49%	50%-74%	75%-100%
2008	1%	48%	14%	20%	16%
2009	11%	39%	24%	13%	13%
2010	10%	52%	10%	15%	13%
2011	4%	51%	18%	12%	15%

We also examined whether firm size affected firm's revenue from Energy Trust projects. There were no statistically significant differences between large and small firms' proportion of Energy Trust-related revenue in 2010, either within sectors or across all responding trade allies.[4]

Economic Impact of Participation

In the 2011 survey, we sought to understand how trade allies viewed the economic impacts of their participation in Energy Trust projects in 2011. Overall, over half of trade allies (54%) rated their participation in Energy Trust as a positive economic impact (a "6" or higher on a "0" to "10" scale). One fourth of trade allies (26%) rated Energy Trust participation as having a negative economic impact (a "4" or less). These responses did not differ significantly across sectors. Quantitatively, though, the industrial and solar PV sector Trade allies were the most

[4] Mann-Whitney U Nonparametric test for Independent Samples p>.05.

likely to rate the economic impact a "10" (38% and 40%, respectively), followed by the commercial sector (28%).

Table 9: Economic Impacts of Participation in Energy Trust Projects in 2010

RATING	SECTOR			ALL RESPONDENTS (*n* = 191)
	RESIDENTIAL (*n* = 104)	C & I (*n* = 40)	SOLAR PV (*n* = 20)	
0 - Negative impacts	6%	0%	0%	5%
1	4%	0%	5%	4%
2	8%	5%	0%	6%
3	6%	0%	0%	4%
4	5%	8%	15%	8%
5	19%	25%	20%	20%
6	10%	3%	5%	8%
7	15%	8%	10%	12%
8	10%	18%	5%	10%
9	4%	5%	0%	4%
10 - Positive impacts	14%	30%	40%	19%

Responses for the Other Renewables sector were distributed fairly evenly over the range.

Anticipated Change in Proportion of Projects that Involve Energy Trust

We asked trade allies whether they anticipate a change in the proportion of projects involving Energy Trust in 2011. Table 10 shows the trade allies' expectations as to whether the proportion of their projects involving Energy Trust will increase, decrease, or have no change in 2011.

Table 10: Anticipated Change in Energy Trust Workload

ANTICIPATED CHANGE	SECTOR			ALL RESPONDENTS (*n* = 182)
	RESIDENTIAL (*n* = 104)	C & I (*n* = 40)	SOLAR PV (*n* = 20)	
Expect a decrease in proportion of projects	17%	5%	25%	15%
No change	31%	33%	25%	30%
Expect an increase in proportion of projects	44%	60%	50%	48%
Don't know	8%	3%	0%	7%

Nearly half of trade allies (48%) expect an increase in Energy Trust work in 2011. Trade allies in the other renewables sector are the least certain about future Energy Trust work, with four of nine respondents indicating "don't know." Additionally, almost a fifth of residential sector trade allies expect a decrease in Energy Trust work. Overall, trade allies' expectations do not differ from what was reported in the 2010 survey.

The residential allies that expect to decrease the proportion of their projects that involve Energy Trust report providing a variety of primary services (Table 11)[5]. The most frequent primary service they provided was heat pump installations (6 respondents).

Table 11: Primary Service of Residential Trade Allies Expecting Decrease in Energy Trust Participation

PRIMARY SERVICE	COUNT (*n* = 18)
Heat pump	6
Insulation	4
Windows	3
Gas furnace	2
Water heater	2
New site-built home	1

Influence of Energy Trust Incentives

In the 2011 survey, we asked trade allies about the influence of Energy Trust incentives in moving both energy efficiency and renewable projects forward in 2010. We show respondents' responses for the primary market in which they reported working. Over half of trade allies in the energy efficiency sectors (50% of residential, 74% of commercial, and 63% of industrial) rated Energy Trust incentives as at least a "7" on a "0-to-10" scale (Table 12). Only a fifth of these trade allies rated energy efficiency incentives as less than a "5".

Table 12: Influence of Energy Trust Incentives in Moving Energy Efficiency Projects Forward

RATING	SECTOR		ALL EFFICIENCY SECTOR ALLIES (*n* = 141)
	RESIDENTIAL (*n* = 102)	C & I (*n* = 39)	
0 - No influence	2%	0%	1%
1	5%	0%	4%
2	8%	5%	7%
3	5%	8%	6%

[5] The commercial trade allies who reported expecting a decrease in Energy Trust work did not answer this question.

RATING	SECTOR		ALL EFFICIENCY SECTOR ALLIES (*n* = 141)
	RESIDENTIAL (*n* = 102)	C & I (*n* = 39)	
4	1%	0%	1%
5	18%	8%	15%
6	12%	8%	11%
7	16%	8%	13%
8	13%	21%	15%
9	10%	10%	10%
10 - Critical	12%	33%	18%

Trade allies working in the renewable energy sectors rated Energy Trust incentives as similarly influential, with 21% rating incentives less than a "5" (Table 13).

Table 13: Influence of Energy Trust Incentives in Moving Renewable Energy Projects Forward

RATING	SOLAR PV (*n* = 19)	ALL RENEWABLE SECTOR ALLIES (*n* = 28)
0 - No influence	0%	7%
1	5%	7%
2	0%	4%
3	5%	4%
4	0%	0%
5	5%	7%
6	0%	0%
7	16%	11%
8	11%	11%
9	0%	4%
10 - Critical	58%	46%

Summary of Impact of Involvement

Nearly three-quarters of trade allies say that less than half their work comes from Energy Trust projects, and half of trade allies put the figure at one-quarter or less. Commercial and industrial trade allies report the least of their business is from Energy Trust and those doing renewables report the highest percentage. Overall, trade allies viewed Energy Trust as having a positive economic impact on their business.

Relatively few trade allies expected a decrease over the next year in the proportion of their work that comes from Energy Trust projects, and about half expected an increase. Those in the commercial and industrial sectors were somewhat more likely than those in other sectors to report an expected increase. Trade allies generally viewed the Energy Trust incentives as important in moving energy efficiency and renewable projects forward.

PROGRAM PAPERWORK

We attempted to understand when and why trade allies complete program paperwork for their customers. A majority of trade allies (76%), report completing most or all of their customers' paperwork more than 75% of the time (Table 14). This finding is true across sectors. Paperwork completion for customers appears highest in the residential sector (53% always complete most or all paperwork), and in the renewables sectors (80% of Solar PV allies and 88% of other renewables allies always complete most or all paperwork).

Table 14: Frequency of Completing Most or All Program Paperwork for Customers

PROPORTION	SECTOR			ALL RESPONDENTS (*n* = 188)
	RESIDENTIAL (*n* = 102)	C & I (*n* = 40)	SOLAR PV (*n* = 20)	
0%	6%	8%	5%	6%
1 to 24%	6%	5%	5%	7%
25 to 49%	3%	0%	5%	3%
50 to 74%	6%	20%	5%	8%
75 to 99%	26%	28%	0%	24%
100%	53%	40%	80%	52%

The paperwork completion rates are marginally higher than in the 2010 survey (67% completed paperwork more than 75% of the time), but this result does not reach significance. Rates across all sectors except industrial are also marginally higher than last year.

Reasons for Not Completing Paperwork

In this survey of 2010 trade allies, we asked additional questions about how and why trade allies fill out program paperwork, and who is involved. Respondents identified the most common reasons for not completing the paperwork for a customer. Many of the 59 respondents misunderstood the instructions to rating the first, second, and third reasons, and rated more than one reason as the top reason. Therefore, we show both the frequencies of the first rating ("top reason") and of all reasons given. The most common reason cited for not completing paperwork was that the customer prefers to complete the paperwork, followed by not having the necessary documentation (Table 15).

Table 15: Reasons for Not Completing Customer's Paperwork (Multiple Responses Allowed)

REASON	MENTIONS	
	TOP REASON	ALL REASONS
The customer prefers to complete the paperwork	29	43
No access to the necessary documentation	11	32
The amount of paperwork is excessive	9	25
The paperwork is too complex or confusing	7	23
No access to the application	4	18

Thirty-two respondents also provided open-ended explanations. Many of these explanations specified that the respondents did complete the paperwork for their clients, or that they did not have clients for which to fill out paperwork. Other responses specified specific situations in which the respondent could not complete the paperwork, or specific sections which they could not complete. All responses appear in the Appendix.

Employees Involved In Paperwork

Respondents also indicated which staff members had a significant role in processing customer applications (Table 16). The most common staff member listed was the owner or top management. There was a significant difference in the incidence of sales staff completing paperwork across sectors: more than half of commercial and industrial sector allies reported that sales staff completes paperwork, compared to one fourth overall.

Table 16: Staff Members with Significant Involvement in Processing Applications (Multiple Responses Allowed)

STAFF MEMBER:	SECTOR			ALL RESPONDENTS (*n* = 174)
	RESIDENTIAL (*n* = 97)	C & I (*n* = 35)	SOLAR PV (*n* = 19)	
Owner or top management	59%	63%	63%	61%
Administrative staff	46%	23%	42%	40%
Sales staff	16%	54%	16%	24%
Technicians	18%	6%	21%	17%

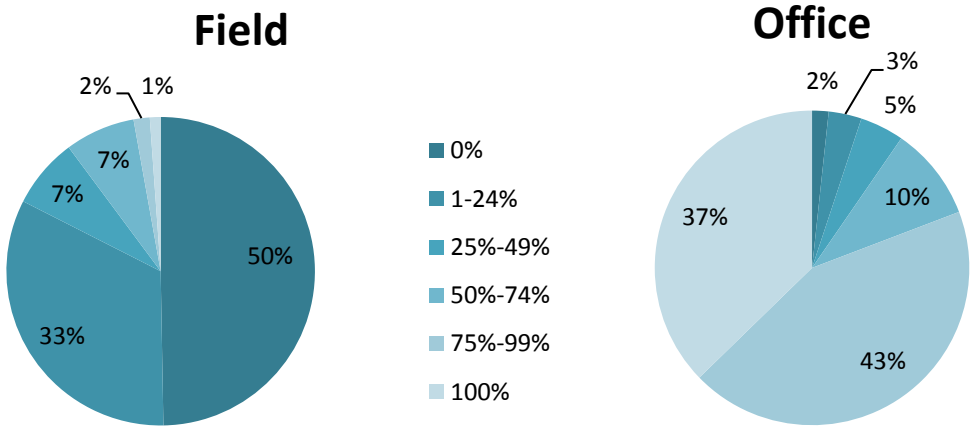
Five respondents also provided open-ended answers, most of which provided additional specification for previous answers.

Location of Paperwork Completion

We also asked trade allies about the locations in which they do most of their paperwork. Many trade allies omitted responses in at least one of the three categories, even though a "0%" box was provided. In these cases, 0% is assumed. Three respondents also indicated that they completed some of their paperwork in "other" locations, but did not specify where.

Overall, respondents reported completing more paperwork in the office than in the field (Figure 2). Responses did not differ significantly across sectors.

Figure 2: Amount of Incentive Paperwork Completed in the Field or Office *(n* = 177)



Summary of Paperwork

Rates of trade allies' completion of paperwork are high, with more than three-fourths of respondents reporting completing most or all program paperwork for customers 75% of the time or more, with top management and administrative staff playing key roles. The most frequent reason provided for not completing customer paperwork was that the customer preferred to complete it personally. Few trade allies reported completing paperwork in the field.

FAMILIARITY WITH AND USE OF 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. Table 17 shows the tax credit familiarity of this year's surveyed allies. Similar to results of the 2010 survey, overall familiarity was high: only 11% of trade allies reported being unfamiliar with both tax credits. No renewables trade allies (Solar or Other) reported unfamiliarity with both tax credits.

Table 17: Familiarity with ODOE Tax Credits

FAMILIARITY	SECTOR			ALL RESPONDENTS (*n* = 177)
	RESIDENTIAL (*n* = 101)	C & I (*n* = 39)	SOLAR PV (*n* = 20)	
Not familiar with either	15%	10%	0%	11%
Familiar with BETC and RETC	54%	33%	90%	54%
Familiar with BETC	7%	51%	10%	18%
Familiar with RETC	24%	5%	0%	16%

We also asked those respondents who reported familiarity with either tax credit to rate how often they mention them to customers. Table 18 shows respondents who reported often or always mentioning these tax credits to customers (a "4" or "5" on a five-point scale). Ratings differed significantly across sectors, with residential sector trade allies reporting the lowest rates of mentioning the tax credits.[6]

Table 18: Frequency of Mentioning ODOE Tax Credits to Customers

	SECTOR			ALL RESPONDENTS (*n* = 156)
	RESIDENTIAL (*n* = 87)	C & I (*n* = 35)	SOLAR PV (*n* = 20)	
Often or always mention*	57%	83%	100%	69%

*Rated a "4" or a "5" on a five-point scale.

Respondents also ranked the potential value of several items in terms of their ability to help increase customers' use of BETC and RETC (Table 19). Because many of the 144 respondents who completed this question misunderstood the instructions to rank the items in order of importance, only the top rankings are shown. Similar to the 2010 survey, the most frequently mentioned suggestions were advertising (59 mentions) and providing handouts to contractors (43). Nine respondents also provided other comments about the tax credit process, many of which expressed frustration. (See Appendix for complete responses.)

[6] Kruskal-Wallis Independent Samples Nonparametric test p<.05. Six of the nine Other Renewables trade allies reported mentioning tax credits to customers; they were not included in the analysis.

Table 19: Ways to Increase Customer Use of Energy Tax Credits (Multiple Responses Allowed)

ITEM RATED "TOP REASON"	SECTOR					TOTAL
	RESIDEN-TIAL	COMMER-CIAL	INDUS-TRIAL	SOLAR PV	OTHER RENEW-ABLES	
Advertising tax credits with Energy Trust incentives	35	12	2	8	1	59
Providing handouts on tax credits for contractors to give to customers	22	6	3	8	4	43
Revising Energy Trust incentive paperwork to be more consistent with BETC/RETC paperwork	16	4	2	2	4	29
Providing training on the steps needed to complete a tax credit project	7	5	5	5	2	26

Tax Credits Summary and Recommendations

Awareness of the tax credits remains very high. As these tax credits are a significant source of incentives for energy efficiency, it is recommended that Energy Trust continue to offer training for contractors on the use of energy tax credits and to provide them with simple yet comprehensive lists (such as the *Cash Incentives Quick Reference*) describing available cash incentives and other available tax credits.

USE OF FINANCING SERVICES

Energy Trust has worked with Umpqua Bank to provide another financing service to Energy Trust customers for nearly 3 years now. We again asked trade allies about their awareness of, and promotion of, the Green Street Lending program. In addition, we also asked trade allies about the types of features they would prefer in an Energy Trust financing program.

Green Street Lending

The overall rate of awareness of Green Street was similar to that of the 2009 trade allies (69% and 76%, respectively; Table 20). About a fifth of respondents (18%) reported actively promoting Green Street.

Table 20: Promotion of Green Street Financing and Other Financing Services

STATUS	SECTOR			ALL RESPONDENTS (*n* = 179)
	RESIDENTIAL (*n* = 103)	C & I (*n* = 38)	SOLAR PV (*n* = 18)	
Actively promote Green Street	8%	5%	11%	7%
Actively promote Green Street and other financing programs	15%	0%	16%	11%
Actively promote financing program(s) other than Green Street	9%	8%	0%	7%
Used in past, but not now	3%	3%	5%	3%
Aware of such services, but do not actively promote them	36%	37%	47%	39%
Not familiar with such services	27%	47%	16%	31%

This year we also asked trade allies if they promote other financing programs. Eighteen percent of respondents reported promoting other financing programs either in addition to or in lieu of Green Street, including First Security, GE money, Graybar financial services, and Wells Fargo. Several respondents also offered comments about Green Street, including that their customers did not find the offer attractive (5 responses), or that their customers had found it difficult to qualify (2 responses).

Financing Suggestions

In this year's trade ally survey, we asked respondents about the features they would like to see in an Energy Trust program to finance efficiency and renewable projects (Table 21). A majority of the 169 respondents desired simplified paperwork (114 mentions) and online applications (103). Many respondents in the Solar PV sector were also interested in a broader range of possible loan amounts (14). Industrial trade allies were also interested in longer financing terms (5 mentions).

Table 21: Features Desired in an Energy Trust Financing Program (Multiple Responses Allowed)

FEATURE	SECTOR				TOTAL MENTIONS
	RESIDEN-TIAL	C & I	SOLAR PV	OTHER RENEWABLES	
Simplified paperwork	73	18	12	6	114
On-line applications	60	25	11	3	103
Broader range of possible loan amounts	41	17	14	2	78
Allow contractors to submit paperwork for customers	35	15	5	0	58

FEATURE	SECTOR				TOTAL MENTIONS
	RESIDEN-TIAL	C & I	SOLAR PV	OTHER RENEWABLES	
Telephone assistance with applications	29	18	6	3	58
Clearer application instructions	28	13	6	2	51
Longer financing terms	26	11	8	0	47
Not interested in offering financing	14	3	3	0	22

Twenty-one respondents also provided various comments about financing options, with a variety of opinions. These responses are presented in the Appendix

Recommendations

A large number of trade allies are familiar with the Green Street Lending Program and many actively promote it. We recommend that Energy Trust allow these services to continue. It is recommended that Energy Trust review the suggestions for improvements and continue to work with Umpqua Bank to correct any substantive issues.

EVALUATION OF MARKETING CHANNELS

We asked trade allies about the effectiveness of various marketing channels for generating leads. Overall, trade allies gave the highest ratings to co-op advertising, and the lowest rating to the "find a contractor" page, but the ratings were all within a close range. Table 22 shows the percent of respondents who rated each channel a "4" or a "5" on a five-point scale, by sector. No industrial sector allies rated any of the marketing channels as effective. Table 23 shows the full five-point scale ratings for all trade allies.

Table 22: Percent Rating Marketing Channel Effective*

CHANNEL	SECTOR			ALL RESPONDENTS (*n* = 158)
	RESIDENTIAL (*n* = 94)	C & I (*n* = 34)	SOLAR PV (*n* = 17)	
Co-op advertising	34%	27%	47%	33%
Star rating for Trade Allies	39%	20%	14%	31%
Energy Trust in the media	29%	32%	43%	31%
Energy Trust advertising	32%	31%	33%	30%
Energy Trust website (in general)	27%	24%	13%	25%

CHANNEL	SECTOR			ALL RESPONDENTS (*n* = 158)
	RESIDENTIAL (*n* = 94)	C & I (*n* = 34)	SOLAR PV (*n* = 17)	
Find a Contractor page	25%	17%	13%	23%

*Percentages refer to the percent of respondents who rated a channel as a "4" or a "5" on a five-point scale.

Table 23: Ratings of Effectiveness of Marketing Channels

CHANNEL	1 - NOT AT ALL EFFECTIVE	2	3	4	5 - VERY EFFECTIVE	NA
Co-op advertising (*n* = 144)	11%	14%	26%	14%	19%	17%
Star rating for Trade Allies (*n* = 142)	25%	8%	24%	16%	15%	12%
Energy Trust in the media (*n* = 147)	10%	17%	33%	18%	13%	10%
Find a Contractor page (*n* = 148)	20%	22%	24%	11%	11%	11%
Energy Trust advertising (*n* = 151)	7%	21%	33%	19%	11%	9%
Energy Trust website (in general) (*n* = 153)	21%	23%	26%	15%	10%	5%

NW NATURAL WASHINGTON EXPANSION

A fifth of respondents (19%) indicated that they actively offer Energy Trust services to NW Natural Gas customers in SW Washington (Table 24). This proportion represents an increase over last year's survey, when 12% of trade allies reported working in Washington, but this difference was not statistically significant. Sixty-five percent of respondents reporting Washington work were residential sector trade allies.

Table 24: Offer Energy Trust Services in SW Washington in 2010

RESPONSE	SECTOR			ALL RESPONDENTS (*n* = 175)
	RESIDENTIAL (*n* = 99)	C & I (*n* = 38)	SOLAR PV (*n* = 20)	
Yes	22%	21%	0%	19%
No	78%	79%	100%	81%

Of those 34 respondents who worked in Washington, only 15% (three residential sector and two commercial sector trade allies) reported that more than a quarter of their Energy Trust work was in Washington in 2010. Furthermore, a third of these respondents said that none of their Energy Trust work came from Washington last year. The location of these respondents' work in Washington was concentrated in Vancouver, but also included Camas and other areas (Table 25).[7]

Table 25: Distribution of Work across Cities and Counties in SW WA

LOCATION	0%	1% - 25%	26% - 50%	51% - 75%	76% - 99%	100%
Vancouver	7	5	2	7	7	2
Camas	9	10	1	2	0	0
Other parts of Clark County	11	8	1	1	0	0
Klickitat or Skamania County	12	4	0	0	0	0

Thirty-one of the 34 respondents who reported offering services in SW Washington also commented on the main barriers to serving these areas (Table 26). The most common barrier identified was lack of customer awareness of Energy Trust (17 mentions), followed by the limited number of Energy Trust incentives available (11 mentions).[8]

Table 26: Main Barriers to Serving SW Washington (Multiple Responses Allowed)

BARRIER	SECTOR			TOTAL MENTIONS (*n* = 31)
	RESIDENTIAL (*n* = 19)	C & I (*n* = 8)	OTHER RENEWABLES (*n* = 1)	
Lack of customer awareness of Energy Trust	9	5	1	17
The limited number of Energy Trust incentives available in WA	5	2	1	11
The Oregon in "Energy Trust of Oregon"	6	0	0	8
No barriers exist at this time	5	1	0	6
Customer perception that newer homes do not need energy efficiency improvements	2	2	0	4

[7] Many respondents did not give responses that added to 100%, so these responses should be interpreted generally.

[8] Energy Trust's Washington programs do not include industrial or renewable program work (with the exception of solar hot water). Industrial sector respondents who do Energy Trust work in Washington likely do commercial sector work there.

BARRIER	SECTOR			TOTAL MENTIONS (*n* = 31)
	RESIDENTIAL (*n* = 19)	C & I (*n* = 8)	OTHER RENEWABLES (*n* = 1)	
Income barriers	4	0	0	4
Lack of customer interest in energy efficiency or renewables	0	2	0	3

4 ENERGY TRUST TRADE ALLY INTERACTIONS

This section summarizes findings relating to Energy Trust's direct interactions with and support of trade allies. It covers attitudes and behaviors related to:

- The trade ally insurance tracking process (EBIX)
- Training and support
- Roundtable discussions
- Trade ally communication
- The *Insider* newsletter
- The Energy Trust website
- The Energy Trust trade ally star rating system

TRADE ALLY INSURANCE TRACKING PROCESS (EBIX)

Energy Trust is currently using the insurance tracking company EBIX to track insurance status for all trade allies (EBIX tracks insurance and verifies that policies are up to date). Among 2009 respondents, dissatisfaction with the insurance tracking company EBIX was relatively high.

In the 2010 survey, we asked respondents about specific experiences they had with EBIX. Over a third of trade allies (38%) reported having no interactions with EBIX. Of those reporting any interactions, 44% reported some complaint. Of those, the most common experience was having to submit the same documentation multiple times (50 respondents), followed by unclear communication (22), and difficulty reaching a contact at EBIX (21). Six respondents provided comments that reiterated these complaints.

Table 27: Interaction with EBIX (Multiple Responses Allowed)

EXPERIENCE	SECTOR				ALL RESPONDENTS (*n* = 180)
	RESIDEN-TIAL	C & I	SOLAR PV	OTHER RENEW-ABLES	
I had to submit the same documentation multiple times	28	12	8	1	50
Communication from EBIX was not clear	13	6	3	0	22
It was difficult to contact someone	11	6	4	0	21

EXPERIENCE	SECTOR				ALL RESPONDENTS (*n* = 180)
	RESIDEN-TIAL	C & I	SOLAR PV	OTHER RENEW-ABLES	
at EBIX to get information					
EBIX did not provide needed information in a timely manner	5	3	0	0	9
EBIX decisions were not consistent with Oregon law or regulations	4	0	0	0	4
There were no problems with EBIX	27	10	8	4	53
I had no interactions with EBIX	40	16	4	4	68

Energy Trust is aware of issues with the EBIX service and has worked with EBIX to address many of these customer service issues. Energy Trust anticipates taking the insurance tracking function in-house once the new Integrated Solutions Project (ISP) has been implemented. It is recommended that these results and specific suggestions be shared with EBIX and steps taken to address substantive issues.

TRAINING AND SUPPORT

We assessed trade ally interest in receiving training and support of various types. We also looked at the level of trade ally participation in Energy Trust trainings and asked those that take part for ways to improve these trainings.

Interest in Training in Various Program Areas

We presented a list of program areas and asked the trade allies to rank the top three areas in which they would like to receive training. Despite the instructions, some trade allies ranked up to 17 items, so summaries are given. Table 28 shows all items given a top ranking by respondents (given a "1"), and Table 29 shows all of the items ranked by respondents (a "1," "2," or "3").

Table 28: Program Areas in which Allies Would *Most* Like to Receive Training

TOPIC	SECTOR			ALL RESPONDENTS (*n* = 159)
	RESIDENTIAL (*n* = 96)	C & I (*n* = 36)	SOLAR PV (*n* = 17)	
Savings calculation tools	24%	11%	24%	21%
Business development	19%	19%	29%	19%
Communicating the value of energy efficiency to customers	19%	19%	6%	18%
BETC and RETC	17%	8%	18%	17%

TOPIC	SECTOR			ALL RESPONDENTS (*n* = 159)
	RESIDENTIAL (*n* = 96)	C & I (*n* = 36)	SOLAR PV (*n* = 17)	
Residential HVAC	23%	0%	6%	15%
Solar electric	10%	11%	53%	14%
Program paper work	13%	19%	6%	13%
Duct sealing and insulation	18%	0%	6%	12%
Air quality and air quality diagnostics	17%	3%	6%	11%
Commercial HVAC	8%	11%	0%	8%
Residential new homes	10%	3%	6%	8%
Residential lighting	8%	8%	12%	8%
Residential windows	10%	0%	6%	8%
Commercial Lighting	1%	25%	6%	7%
Customer service	10%	3%	0%	7%
Insulation	7%	0%	6%	5%
Solar water heating	4%	6%	6%	4%

Table 29: Program Areas in which Allies Would Like to Receive Training

TOPIC	SECTOR			ALL RESPONDENTS (*n* = 159)
	RESIDENTIAL (*n* = 96)	C & I (*n* = 36)	SOLAR PV (*n* = 17)	
Communicating the value of energy efficiency to customers	47%	56%	29%	46%
Savings calculation tools	45%	42%	47%	43%
BETC and RETC	36%	44%	65%	43%
Business development	35%	42%	53%	38%
Program paper work	34%	39%	35%	35%
Residential HVAC	44%	14%	12%	32%
Solar electric	25%	25%	65%	28%
Air quality and air quality diagnostics	33%	17%	6%	25%
Commercial HVAC	24%	31%	6%	23%
Duct sealing and insulation	29%	6%	12%	21%
Residential new homes	27%	8%	18%	21%
Solar water heating	22%	8%	6%	19%
Commercial Lighting	9%	44%	18%	18%

TOPIC	SECTOR			ALL RESPONDENTS (*n* = 159)
	RESIDENTIAL (*n* = 96)	C & I (*n* = 36)	SOLAR PV (*n* = 17)	
Residential lighting	15%	19%	18%	16%
Customer service	17%	14%	24%	16%
Insulation	19%	6%	12%	14%
Residential windows	17%	6%	12%	13%

Overall, the three areas that generated the most interest were communicating the value of energy efficiency to customers (46% of respondents), savings calculation tools (43%), BETC and RETC (43%, including 5 of 7 Other Renewables trade allies), and business development (38%). Six of the seven responding industrial trade allies indicated an interest in communicating the value of energy efficiency to customers. Four of seven Other Renewables sector trade allies were interested in solar water heating training.

Several allies also indicated an interest in other types of training, which often reiterated previous responses. Three respondents indicated an interest in weatherization air sealing, and/or building envelope training, and two specified an interest in commercial sector trainings. See Appendix for full responses.

Interest in Support from Energy Trust

We asked trade allies to indicate their level of interest in various types of support from Energy Trust. Table 30 below shows the distribution of responses of the 166 respondents, as well as the mean response of all of the trade allies on each type of support. This question was expanded from last year's survey to include items about interest in types of training. Responses to the repeated items were similar across survey years.

Table 30: Interest in Various Types of Support from Energy Trust

SUPPORT	1 = NOT AT ALL INTERESTED TO 5 = VERY INTERESTED					MEAN
	1	2	3	4	5	
Cooperative advertising support (Energy Trust co-brands on your ads and pays a portion of costs)	8%	8%	13%	17%	55%	4.0
Regular updates/information on energy efficient products and services	4%	8%	29%	26%	33%	3.8
Training about Energy Trust Programs	5%	10%	29%	28%	29%	3.7
Scholarships to energy conferences or workshops	12%	15%	17%	15%	40%	3.6
Technical training in energy efficiency in own trade	13%	9%	20%	26%	32%	3.5

SUPPORT	1 = NOT AT ALL INTERESTED TO 5 = VERY INTERESTED					MEAN
	1	2	3	4	5	
Regular updates/information on renewable energy products and services	12%	12%	28%	23%	25%	3.4
Technical program support (email)	11%	13%	32%	23%	21%	3.3
Technical training in renewable energy products and services	19%	15%	24%	17%	25%	3.1
Technical training in energy efficiency in other trades	22%	22%	24%	22%	11%	2.8
Publicizing a Trade Ally of the Month in the newsletter	25%	22%	28%	7%	18%	2.7
Training on BETC and/or RETC	10%	7%	33%	26%	24%	3.5
Training on calculating customer incentives	14%	16%	28%	26%	17%	3.2

Generally allies seemed to be quite interested in cooperative advertising and in furthering their knowledge (via conferences, trainings, and regularly updated information) of energy efficiency, especially in their own trade. Table 31 shows the percent of respondents who were interested (a "4" or a "5" on a five-point scale) in these types of support, as well as sector-specific responses to interest in types of trainings.

Table 31: Percent Interested in Types of Energy Trust Support by Sector

SUPPORT	SECTOR			ALL RESPONDENTS (*n* = 157)
	RESIDENTIAL (*n* = 96)	C & I (*n* = 32)	SOLAR PV (*n* = 17)	
Cooperative advertising support (Energy Trust co-brands on your ads and pays a portion of costs)	76%	63%	65%	71%
Regular updates/information on energy efficient products and services	63%	66%	36%	59%
Technical training in energy efficiency in own trade	56%	67%	47%	58%
Scholarships to energy conferences or workshops	58%	63%	40%	56%
Training about Energy Trust Programs	57%	50%	47%	56%
Training on BETC and/or RETC	52%	56%	38%	50%
Regular updates/information on renewable energy products and services	47%	35%	71%	48%
Technical program support (email)	43%	50%	50%	44%

SUPPORT	SECTOR			ALL RESPONDENTS (*n* = 157)
	RESIDENTIAL (*n* = 96)	C & I (*n* = 32)	SOLAR PV (*n* = 17)	
Training on calculating customer incentives	41%	46%	50%	43%
Technical training in renewable energy products and services	42%	38%	40%	42%
Training on energy modeling	39%	41%	46%	41%
Training on solar technologies	31%	40%	69%	39%
Training on HVAC	47%	22%	0%	35%
Training on other renewable technologies	28%	31%	71%	34%
Technical training in energy efficiency in other trades	38%	34%	7%	33%
Training on building shell measures	40%	15%	14%	32%
Training for BPI certification	33%	28%	23%	30%
Training on the PTCS program	33%	37%	0%	27%
Training on commissioning	27%	24%	23%	27%
Publicizing a Trade Ally of the Month in the newsletter	26%	47%	7%	26%
Training on motors and controls	23%	36%	23%	26%
Training on early design	24%	21%	31%	23%
Training on the lighting tool	14%	39%	29%	20%
Training on the irrigation tool	5%	24%	15%	9%
Training on the compressed air tool	7%	20%	0%	8%

A majority of the nine Other Renewables sector trade allies indicated an interest in each of the renewable-related items. Five respondents also offered additional comments about trainings (see Appendix).

Training Participation and Value Received

We also asked trade allies about when they (or a member of their staff) had last attended an Energy Trust training. A majority of the trade allies surveyed (71%) had either attended or had a staff member attend an Energy Trust-sponsored training since January 2010 (Table 32). All nine other renewables allies had attended a training since 2010. No significant changes were seen compared to the previous survey.

Table 32: Last Time You or Staff Member Attended Training Sponsored by Energy Trust

DATE OF LAST TRAINING	SECTOR			ALL RESPONDENTS (*n* = 170)
	RESIDENTIAL (*n* = 102)	C & I (*n* = 37)	SOLAR PV (*n* = 18)	
2010 or later	72%	68%	61%	71%
Before 2010	9%	16%	17%	11%
Never	7%	14%	22%	9%
Don't know	13%	3%	0%	9%

Trade allies typically feel as though they are getting value from Energy Trust trainings (Table 33). Over half of the respondents (60%) rated the value of the trainings as a "4" or a "5" on a five-point scale, and 15% gave a rating of "2" or "1". Ratings of the value of trainings were lowest among the Other Renewables sector: while 55% to 66% trade allies across the other sectors rated their last training a "4" or "5", only two of the eight responding Other Renewable sector trade allies (25%) did so; with the small sample size, however, it is not possible to determine whether this difference is statistically reliable.

Table 33: Value of Your Most Recent Energy Trust Training

VALUE OF TRAINING	SECTOR			ALL RESPONDENTS (*n* = 141)
	RESIDENTIAL (*n* = 84)	C & I (*n* = 31)	SOLAR PV (*n* = 15)	
1 - Not at all valuable	6%	3%	0%	4%
2	6%	6%	20%	11%
3	18%	29%	13%	21%
4	39%	16%	40%	33%
5 - Very valuable	27%	39%	20%	28%
No Answer	4%	6%	7%	4%

Training Barriers and Suggestions

In this year's survey, we asked trade allies whether location was a barrier to attending trainings. Less than a fifth of trade allies (18%) reported that location made it very difficult or impossible to attend trainings (Table 34). Respondents in the Other Renewables sector felt that location was more of a barrier than respondents in other sectors: a majority of respondents in each sector except Other Renewables said that location did not prevent them from attending trainings. Four respondents also expressed comments about trainings.

Table 34: Ratings of Location as a Barrier to Trainings

	SECTOR			ALL RESPONDENTS (*n* = 144)
	RESIDENTIAL (*n* = 85)	C & I (*n* = 33)	SOLAR PV (*n* = 15)	
Completely - I have never been able to because of my location	0%	6%	0%	1%
My location makes it very difficult but not impossible to attend	19%	9%	13%	17%
My location makes it inconvenient but not overly difficult to attend	24%	9%	33%	22%
My location does not prevent me from attending	58%	76%	53%	60%

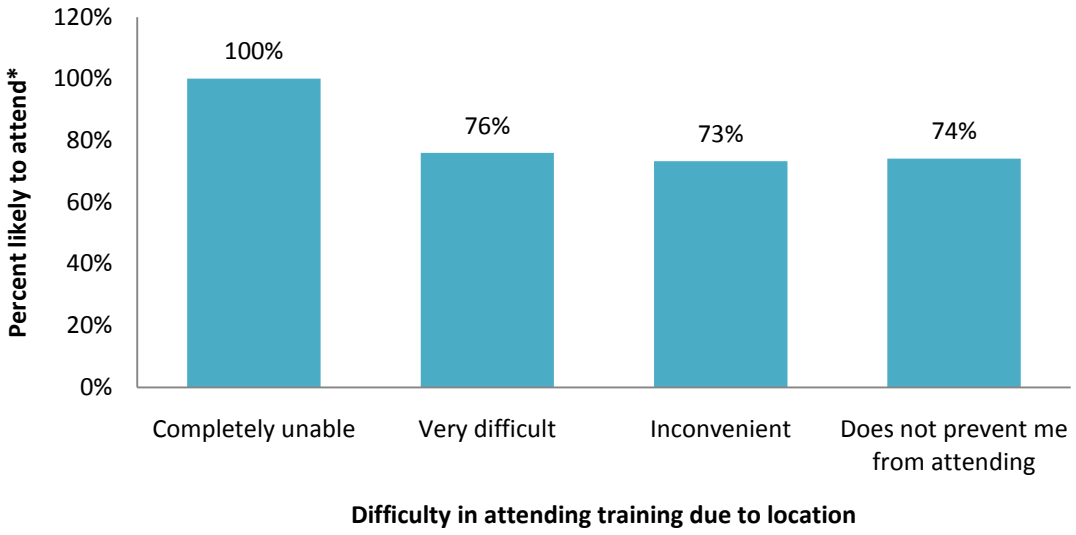
We also asked respondents about the likelihood that they would attend an hour-long webinar training on a topic that interested them. Over two-thirds of respondents in each sector (73% overall) reported that they would be likely (a "4" or a "5" on a five-point scale) to attend a webinar training (Table 35).

Table 35: Likelihood of Attending Webinar Training

RATING	SECTOR			ALL RESPONDENTS (*n* = 146)
	RESIDENTIAL (*n* = 87)	C & I (*n* = 33)	SOLAR PV (*n* = 15)	
1 - Extremely unlikely	10%	3%	7%	8%
2	8%	6%	7%	8%
3	10%	15%	13%	12%
4	22%	36%	7%	25%
5 - Extremely likely	49%	39%	67%	49%

Both respondents who had previously indicated that their location prevented them from attending trainings indicated that they would be "extremely likely" (a "5") to attend a webinar training. Otherwise, ratings of likelihood of attending a webinar training did not differ across the levels of difficulty in attending trainings (Figure 3). This finding suggests that all trade allies could benefit from webinar trainings, not just those in geographically remote areas.

Figure 3: Likelihood of Attending Webinar by Difficulty in Attending Regular Training (*n* = 142)



*A "4" or a "5" on a five-point scale

Training and Support Summary

Trade allies are generally interested in learning about savings calculations tools, business development, and communicating the value of energy efficiency to customers. Other areas of support that received high interest include cooperative advertising, regular updates and information on energy efficient products and services, and training about Energy Trust programs.

Trade allies are acting on their stated desire for training and are attending Energy Trust training sessions and finding them useful. While relatively few trade allies said that their location made it very difficult or impossible to attend trainings, respondents expressed considerable interest in webinar trainings.

ROUNDTABLE DISCUSSIONS

Attendance

In this year's survey, more than half of trade allies in each sector reported having attended a roundtable (Table 36). Roundtable attendance was significantly higher among 2010 trade allies than 2009 allies: two-thirds of 2010 trade allies (67%) reported attending a round-table discussion, compared with just under half (47%) of 2009 trade allies.

Table 36: Roundtable Attendance

	SECTOR			ALL RESPONDENTS (*n* = 163)
	RESIDENTIAL (*n* = 97)	C & I (*n* = 37)	SOLAR PV (*n* = 18)	
Yes	68%	59%	67%	67%
No	32%	41%	33%	33%

Trade allies who reported having attended a roundtable were asked when they had attended their last roundtable (Table 37). A third of trade allies (32%) reported having attended a roundtable in the past month, compared with only 6% of 2009 trade allies. Half of residential sector allies had attended a roundtable in the last 3 months. Commercial sector trade allies continue to have a high level of recent attendance, with 44% of allies having attended in the last 3 months.

Table 37: Most Recent Roundtable Attendance Timeframe

DATE OF LAST ATTENDANCE	SECTOR			ALL RESPONDENTS (n = 108)
	RESIDENTIAL (*n* = 66)	C & I (*n* = 22)	SOLAR PV (*n* = 11)	
1 month ago or less	41%	18%	9%	32%
1-3 months ago	11%	23%	18%	14%
3-6 months ago	18%	14%	9%	16%
6-12 months ago	12%	23%	36%	19%
More than 1 year ago	18%	23%	27%	19%

Value

Many of the allies that are attending the roundtable discussions see some value in them. The mean rating was 3.35 (on a five-point scale), which was not significantly different from last year. Ratings of the usefulness of roundtables varied significantly across sectors: residential and commercial sector trade allies gave significantly higher ratings than allies in other sectors (Table 38).[9]

[9] Kruskal-Wallis Nonparametric test p<.05

Table 38: Usefulness of Roundtables

RATING	SECTOR			ALL RESPONDENTS (n = 107)
	RESIDENTIAL (*n* = 65)	C & I (*n* = 22)	SOLAR PV (*n* = 11)	
1 - Not at all useful	0%	9%	18%	5%
2	15%	14%	27%	19%
3	35%	18%	27%	29%
4	37%	36%	27%	35%
5 - Very useful	12%	23%	0%	13%

Suggestions

The trade allies who attended roundtable discussions were asked to indicate which topics they would like to see covered at these meetings (Table 39). Similar to the findings of last year's survey, the 2010 trade allies expressed particular interest in using roundtable meetings to discuss recent and expected program changes (85 mentions). Other popular topics included tax credits (69), discussing new technologies and measures (68), and field-specific information (63).

Table 39: Suggested Roundtable Topics (Multiple Responses Allowed)

TOPIC	SECTOR				ALL RESPONDENTS (*n* = 106)
	RESIDEN-TIAL	C & I	SOLAR PV	OTHER RENEW-ABLES	
Recent and expected program changes	56	16	7	3	85
Tax credits - how to apply and their current status	43	14	7	4	69
New technologies and measures	43	15	5	3	68
Information specific to your field	37	16	6	2	63
General review of programs	32	8	6	3	51
Marketing	37	5	6	2	51
Legislative updates	29	12	5	4	50
Review of training opportunities	26	8	2	2	40
Forum for general trade ally feedback	23	8	6	2	40
Program processes and paperwork	23	4	5	1	34
Project design / case studies	16	9	5	1	32

We also asked trade allies for their opinions about several possible roundtable changes. Table 40 shows the 103 responding trade allies' preferences for these changes. As responses did not appear to differ across sectors, a sector breakdown is not shown. The most popular suggested change was making roundtables trade-specific (71% approve, 13% disapprove), followed by arranging for roundtables to count towards continuing credits (66% approve, 6% disapprove). Suggestions with the highest level of disapproval were lengthening round tables to four hours or more (63% disapprove), and holding roundtables in the afternoon (50% disapprove).

Table 40: Comments on Possible Roundtable Changes

POSSIBLE CHANGE	LIKE	DON'T LIKE	INDIF-FERENT
Make roundtables trade-specific (*n* = 95)	71%	13%	17%
Arrange for roundtables to count toward continuing credits (*n* = 93)	66%	6%	28%
Put more focus on break-out sessions (*n* = 89)	53%	7%	40%
Offer roundtables as a webinar/videoconference (*n* = 88)	51%	25%	24%
Shortening the general/introductory discussion (*n* = 91)	47%	7%	46%
Shorten roundtables to two hours (*n* = 89)	47%	17%	36%
Allow more trade ally input during roundtables (*n* = 89)	46%	9%	45%
Vary the geographic locations (*n* = 91)	37%	14%	48%
Start roundtables at 10 a.m. or later (*n* = 84)	39%	39%	21%
Start roundtables at 8 a.m. (*n* = 83)	39%	36%	25%
More discussion of the roles of various program implementers (*n* = 82)	29%	11%	60%
Hold roundtables in the afternoon (*n* = 86)	19%	50%	31%
Lengthen roundtables to four hours or longer (*n* = 80)	6%	63%	31%

Roundtable Summary

Roundtable discussion attendance has increased since last year's survey, with two-thirds of respondents attending discussions. Respondents expressed support for making roundtables trade-specific. Energy Trust program changes appears to be a topic of interest for amongst trade allies future roundtables, as well as tax credits and new technologies and measures.

TRADE ALLY COMMUNICATION

Preferred methods

Trade allies were asked to choose the top one or two methods of communication through which they prefer receive information about Energy Trust programs. Table 41 shows that across all sectors, trade allies prefer to receive updates via email. Results are similar to the 2010 survey.

Table 41: Preferred Methods for Receiving Information about Energy Trust Programs (Multiple Responses Allowed)

METHOD	SECTOR			ALL RESPONDENTS (*n* = 166)
	RESIDENTIAL (*n* = 99)	C & I (*n* = 37)	SOLAR PV (*n* = 17)	
Calls from program staff	15%	22%	12%	17%
Emails from program staff	96%	92%	100%	95%
Insider newsletter	38%	24%	41%	34%
Roundtable meetings	17%	14%	12%	15%
Energy Trust website	21%	22%	6%	19%
Training sessions	18%	35%	24%	23%

There was also an "other (please specify)" option which six trade allies used, mainly to make comments about website use, discussed below.

Preferred frequency

When asked about their preferred frequency of communications from Energy Trust, trade allies provided a variety of responses. The most common response was monthly, for all sectors except Solar PV (Table 42). Responses were similar to last year's survey, but with a slight trend towards a preference for more frequent communication.

Table 42: Preferred Frequency of Contact Regarding Energy Trust News and Programs

FREQUENCY	SECTOR			ALL RESPONDENTS (*n* = 166)
	RESIDENTIAL (*n* = 99)	C & I (*n* = 37)	SOLAR PV (*n* = 17)	
Weekly	28%	22%	18%	25%
Bi-weekly	21%	16%	41%	21%
Monthly	34%	49%	35%	39%
Bi-monthly	10%	11%	0%	10%
Other	6%	3%	6%	6%

The 10 respondents who specified "other" generally noted that they preferred communication on an as-needed basis. Several respondents implied that they wanted to be notified of program changes as they occurred.

INSIDER NEWSLETTER

A large majority (79%) of respondents reported receiving the Insider newsletter. We asked these trade allies about their use of the newsletter, and how useful they find it.

Receipt and Use of *Insider* Newsletter

A majority of trade allies (72%) reported that, including themselves, only one or two employees receive the Insider at their firm (Table 43). This proportion is similar to the 2009 trade allies.

Table 43: Employees Receiving Insider Newsletter

	SECTOR			ALL RESPONDENTS (*n* = 119)
	RESIDENTIAL (*n* = 72)	C & I (*n* = 25)	SOLAR PV (*n* = 14)	
One or two	72%	64%	86%	72%
Three to five	25%	32%	14%	25%
Six to ten	1%	4%	0%	2%
More than ten	1%	0%	0%	1%

Trade allies also reported on how often they open and read entire feature articles in the Insider (Table 44). A majority of trade allies reported that they either "usually or always read some of them" (36%), or "sometimes read a complete article" (35%). Less than a fifth (14%) reported "rarely" reading a complete article.

Table 44: Readership of Complete Feature Articles in Insider

	SECTOR			ALL RESPONDENTS (*n* = 129)
	RESIDENTIAL (*n* = 78)	C & I (*n* = 27)	SOLAR PV (*n* = 15)	
Usually or always read all of them	10%	19%	27%	14%
Usually or always read some of them	32%	48%	33%	36%
Sometimes read a complete article	42%	19%	33%	35%
Rarely read a complete article	14%	15%	7%	14%
Never read a complete article	1%	0%	0%	1%

Trade allies also reported on how often they followed links in the Insider to three separate destinations. Patterns of use of the links were generally similar across all three link destinations: trade allies' personal areas of interest (Table 45), program updates (Table 46), and training information (Table 47). About half of respondents reported following these links three-fourths of the time or more. Renewables-sector trade allies, and especially Solar PV trade allies, reported using these links more frequently than trade allies in other sectors.

Table 45: Follow Links to Personal Area of Interest

	SECTOR			ALL RESPONDENTS (*n* = 124)
	RESIDENTIAL (*n* = 74)	C & I (*n* = 26)	SOLAR PV (*n* = 15)	
In every or nearly every newsletter	31%	27%	47%	33%
About three-quarters of the time	24%	15%	27%	22%
About half the time	32%	38%	13%	31%
About one-quarter of the time	4%	19%	0%	6%
Infrequently or never	8%	0%	13%	8%

Table 46: Follow Links to Program Updates

	SECTOR			ALL RESPONDENTS (*n* = 120)
	RESIDENTIAL (*n* = 73)	C & I (*n* = 23)	SOLAR PV (*n* = 15)	
In every or nearly every newsletter	29%	22%	33%	28%
About three-quarters of the time	29%	22%	40%	30%
About half the time	27%	22%	20%	24%
About one-quarter of the time	8%	30%	7%	13%
Infrequently or never	7%	4%	0%	6%

Table 47: Follow Links to Training Information

	SECTOR			ALL RESPONDENTS (*n* = 119)
	RESIDENTIAL (*n* = 73)	C & I (*n* = 24)	SOLAR PV (*n* = 16)	
In every or nearly every newsletter	18%	13%	40%	20%
About three-quarters of the time	26%	19%	20%	24%
About half the time	32%	27%	20%	28%
About one-quarter of the time	14%	29%	13%	17%
Infrequently or never	11%	13%	7%	12%

Usefulness of *Insider* Newsletter

We asked trade allies who reported receiving the Insider newsletter about several topics to assess its usefulness:

- Usefulness of the Insider
- Frequency that articles address interests
- Which types of articles would be most useful in future newsletters
- Length of articles

Similar to last year's results, most of the allies that receive the newsletter find it "somewhat" useful (70%), and only a few (5%) find it "not at all" useful (Table 48). We did not ask the 12% of trade allies that reported that they do not receive the newsletter whether they had opted out of it because they did not find it useful.

Table 48: Usefulness of the Insider Newsletter

	SECTOR			ALL RESPONDENTS (*n* = 125)
	RESIDENTIAL (*n* = 74)	C & I (*n* = 27)	SOLAR PV (*n* = 15)	
Very	26%	26%	27%	26%
Somewhat	69%	70%	73%	70%
Not at all	5%	4%	0%	5%

A majority of respondents (65%) said they find articles that address an area of their interest between one-fourth and half the time (Table 49).

Table 49: Frequency of Articles that Address an Area of Interest

	SECTOR			ALL RESPONDENTS (*n* = 125)
	RESIDENTIAL (*n* = 75)	C & I (*n* = 26)	SOLAR PV (*n* = 15)	
In every or nearly every newsletter	12%	19%	13%	14%
About three-quarters of the time	19%	12%	7%	15%
About half the time	32%	42%	60%	38%
About one-quarter of the time	33%	15%	20%	27%
Infrequently or never	4%	12%	0%	6%

Regarding the most useful types of articles for future newsletters, Energy Trust program updates was rated as useful by a vast majority of trade allies (87%; Table 50). Articles addressing "common problems and solutions" were also rated as useful by a majority of trade allies (70%). These results are consistent with last year's survey. A majority of non-residential sector trade allies also expressed interest in articles about BETC and RETC.

Table 50: Useful Article Types for Future Newsletters

TOPIC	SECTOR			ALL RESPONDENTS (*n* = 126)
	RESIDENTIAL (*n* = 75)	C & I (*n* = 28)	SOLAR PV (*n* = 15)	
Energy Trust program updates	89%	86%	80%	87%
Common problems/solutions	72%	68%	73%	70%
Emerging Technologies	56%	46%	47%	52%
BETC/RETC	44%	57%	67%	51%
Technical assistance or resources	47%	36%	53%	46%
Updates on Energy Trust goals	35%	43%	13%	36%
Case studies of successful projects	33%	50%	20%	36%
Non-Energy Trust news	3%	4%	7%	4%
Other	4%	0%	0%	2%

A large majority of trade allies (87% overall, and all 5 of the other renewables allies) agreed that the length of articles appearing in the Insider newsletter is "about right" (Table 51). A majority of trade allies were either neutral (55%) or slightly positive (a "4" on a five-point scale; 21%) about replacing the full-length articles appearing in the Insider with bullets or brief paragraphs summarizing program updates (Table 52). Only 12% of trade allies rated themselves as opposed to this change (a "1" or a "2" on a five-point scale.)

Table 51: Length of Articles

	SECTOR			ALL RESPONDENTS (*n* = 124)
	RESIDENTIAL (*n* = 75)	C & I (*n* = 26)	SOLAR PV (*n* = 15)	
Much too long	0%	4%	0%	1%
A little too long	13%	8%	7%	10%
About right	87%	85%	87%	87%
A little too short	0%	4%	7%	2%

Table 52: Opinion about Replacing Full Articles with Shorter Summaries of Program Updates

RATING	SECTOR			ALL RESPONDENTS (*n* = 126)
	RESIDENTIAL (*n* = 76)	C & I (*n* = 27)	SOLAR PV (*n* = 14)	
1 = Strongly opposed	1%	0%	0%	1%
2	13%	7%	7%	11%
3	49%	59%	64%	55%
4	22%	22%	21%	21%
5 = Strongly in favor	14%	11%	7%	12%

Notice of Program Changes in *Insider*

We also asked trade allies who reported receiving the Insider about whether it provided sufficient advance notice of program changes. Only six percent of respondents reported that the Insider did *not* provide enough advance notice of program changes (Table 53). A third of respondents (28%) responded "don't know", but a majority (66%) responded that they did receive sufficient notice.

Table 53: Sufficient Advance Notice of Program Changes in Insider

	SECTOR			ALL RESPONDENTS (*n* = 130)
	RESIDENTIAL (*n* = 78)	C & I (*n* = 28)	SOLAR PV (*n* = 15)	
Yes	65%	71%	73%	66%
No	6%	7%	0%	6%
Don't know	28%	21%	27%	28%

Respondents provided a variety of responses about the minimum advance notice of important program changes that they require (Table 54). Three of the six other renewables allies wanted a minimum of six months' notice. Overall, though, roughly two-thirds of respondents considered one month or two months sufficient (32% and 35%, respectively).

Table 54: Minimum Advance Notice of Important Program Changes

	SECTOR			ALL RESPONDENTS (*n* = 128)
	RESIDENTIAL (*n* = 77)	C & I (*n* = 27)	SOLAR PV (*n* = 15)	
Two weeks	8%	19%	20%	11%
One month	31%	37%	27%	32%
Two months	36%	37%	27%	35%
Six months	22%	4%	27%	20%

Insider Newsletter Summary

More than three-fourths of responding trade allies receive the Insider newsletter. Most trade allies report reading at least an article and following links to program updates, training information, and areas of personal interest at least half the time. The majority of contractors reading this publication find it to be 'somewhat useful'.

A majority of trade allies said that the Insider's advance notice of program changes was sufficient. Articles concerning Energy Trust program updates, commonly encountered problems and solutions, emerging technologies, and tax credits all received interest amongst more than half of respondents.

ENERGY TRUST WEBSITE

Trade allies were asked a series of questions about the Energy Trust website. The answers to these questions give us information on their patterns of use of the website as well as feedback about the trade ally pages and the overall website design.

Patterns of Use

We asked the allies how frequently they use the Energy Trust website, and those that use the website were asked which pages they visit (Table 55 and

Table 56). Two-thirds of trade allies report using the website one to three times a month. Most of the 92% of trade allies that use the website report typically visiting the pages with program incentives information (73%) and program forms (62%).

Table 55: Frequency of Energy Trust Website Use

FREQUENCY	SECTOR			ALL RESPONDENTS (*n* = 165)
	RESIDENTIAL (*n* = 98)	C & I (*n* = 37)	SOLAR PV (*n* = 17)	
Never	8%	14%	6%	8%
1 to 3 times a month	62%	73%	71%	66%
1 to 2 times a week	23%	8%	12%	18%
3 to 4 times a week	5%	0%	12%	5%
5 or more times a week	1%	5%	0%	2%

Table 56: Typical Website Pages Visited

PAGE	SECTOR			ALL RESPONDENTS (*n* = 150)
	RESIDENTIAL (*n* = 90)	C & I (*n* = 31)	SOLAR PV (*n* = 16)	
Program incentives	74%	65%	88%	73%
Program forms	57%	61%	81%	62%
Calendar/meetings	53%	39%	19%	45%
General program information	39%	65%	31%	43%
Contractor Search	16%	19%	13%	15%
Consumer pages	9%	0%	13%	7%
Other	2%	0%	0%	1%

Trade Ally pages

The allies that use the Energy Trust website were asked how useful they find the trade ally pages. The average rating for usefulness was 3.5 out of 5, compared with last year's average of 3.7. Table 57 shows the distribution of ratings by sector.

Table 57: Usefulness of Trade Ally Web Pages

	SECTOR			ALL RESPONDENTS (*n* = 146)
	RESIDENTIAL (*n* = 88)	C & I (*n* = 30)	SOLAR PV (*n* = 16)	
1 - Not at all useful	0%	3%	0%	1%
2	10%	17%	19%	12%
3	42%	43%	25%	40%
4	33%	17%	25%	27%
5 - Very useful	15%	20%	31%	19%

Website Navigation

This year, we asked trade allies several questions about how they navigate the website.

We also asked trade allies about the types of information they are looking for when they use the Website, and if they are difficult to find.

We asked trade allies in the 2010 survey about the ease of navigation of the website. On a scale of 1 – 'Very difficult' to 5 – 'Very easy', allies gave an average rating of 3.3, and 38% of allies gave at least a "4" (Table 58).

Table 58: Ease of Energy Trust Website Navigation

	SECTOR			ALL RESPONDENTS (*n* = 147)
	RESIDENTIAL (*n* = 89)	C & I (*n* = 30)	SOLAR PV (*n* = 16)	
1 - Very difficult	2%	3%	0%	2%
2	19%	17%	13%	18%
3	43%	43%	38%	41%
4	22%	30%	38%	26%
5 - Very easy	13%	7%	13%	12%

We asked trade allies more generally about the kinds of information they look for on the website, and whether this information is difficult to find (Figure 4). The most looked-for information included information about incentives (84%), information about forms and applications (79%), and general program information (68%). Generally, less than 12% of trade allies reported difficulties in finding any one topic on the website. The information that the most trade allies reported having difficulty finding (12% overall, 30% of trade allies who looked for it), was promotional material. Similarly, although only a fifth of trade allies reported looking for a contractor search page, roughly half of those who looked for it reported difficulty in locating it. (Table 59) shows the sector-specific information that trade allies looked for on the website.

Figure 4: Top Items Searched for on Energy Trust Website and Difficulty of Locating (*n* = 145)

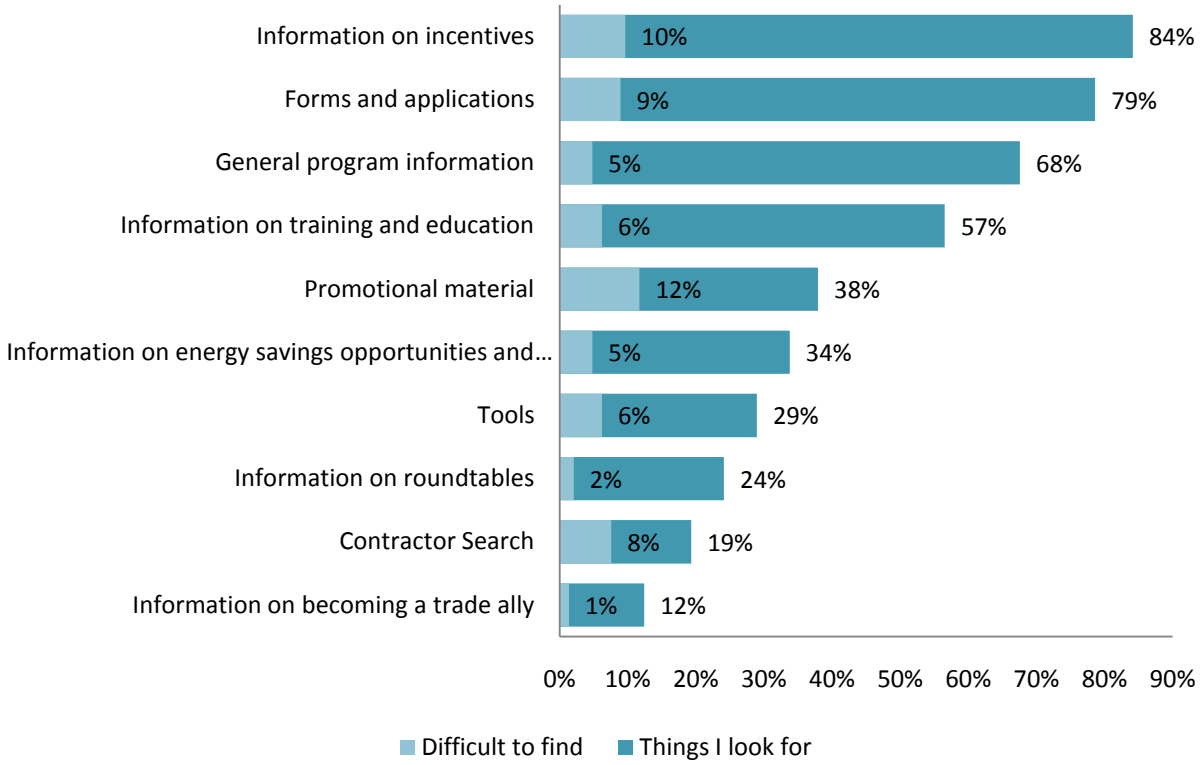


Table 59: Top Items Looked For on Website

	SECTOR			ALL RESPONDENTS (*n* = 145)
	RESIDENTIAL (*n* = 88)	C & I (*n* = 29)	SOLAR PV (*n* = 16)	
Information on incentives	86%	79%	75%	84%
Forms and applications	77%	69%	94%	79%
General program information	67%	69%	63%	68%
Information on training and education	61%	48%	50%	57%
Promotional material	39%	48%	25%	38%
Information on energy savings opportunities and technologies	34%	48%	19%	34%
Tools	24%	45%	25%	29%
Information on roundtables	28%	14%	19%	24%
Contractor Search	23%	21%	0%	19%
Information on becoming a trade ally	11%	21%	6%	12%

We also asked trade allies about their awareness of specific trade ally resources on the Energy Trust Website. Overall, 60% of trade allies reported awareness of the trade ally portal on the Website, and 70% reported awareness of the "for allies" link (Table 60; Table 61). Awareness of both of these resources was lowest among commercial trade allies (39% and 46%, respectively), and highest among other renewables trade allies (8 of 9 and 7 of 8, respectively).

Table 60: Aware of Trade Ally Portal

	SECTOR			ALL RESPONDENTS (*n* = 147)
	RESIDENTIAL (*n* = 86)	C & I (*n* = 32)	SOLAR PV (*n* = 16)	
Yes	64%	41%	56%	60%
No	24%	50%	38%	30%
Don't know	12%	9%	6%	10%

Table 61: Aware of "For Allies" Link

	SECTOR			ALL RESPONDENTS (*n* = 135)
	RESIDENTIAL (*n* = 82)	C & I (*n* = 27)	SOLAR PV (*n* = 15)	
Yes	72%	48%	87%	70%
No	20%	44%	13%	23%
Don't know	9%	7%	0%	7%

We also asked trade allies about whether they would use a laptop or Smartphone app with links to Energy Trust program information. Over half of trade allies (54%) indicated that they would "definitely" or "probably" make use of this resource, and only 5% indicated that they would "definitely not" use it (Table 62).

Table 62: Likelihood of Using an Energy Trust App

	SECTOR			ALL RESPONDENTS (*n* = 145)
	RESIDENTIAL (*n* = 87)	C & I (*n* = 29)	SOLAR PV (*n* = 15)	
Definitely	24%	33%	27%	24%
Probably	30%	27%	33%	30%
Maybe	23%	10%	20%	21%
Probably not	17%	27%	20%	20%
Definitely not	6%	3%	0%	5%

Website Summary

Almost all trade allies use the Energy Trust website at least monthly. Most of these allies are visiting pages that have program forms and information about program incentives. There is a fair amount of satisfaction with the usefulness of the website, but ratings of the ease of navigation continue to be low. About two-thirds of website users reported awareness of the trade ally portal and the "for allies" link. These responses indicate a need to increase awareness of trade ally-specific website resources.

Many trade allies also expressed interest in an Energy Trust laptop or Smartphone app.

STAR RATING SYSTEM

In 2010, Energy Trust introduced the "Star" rating system to rate residential trade allies based on performance criteria and the number of completed projects with Energy Trust. To help assess the effects of this new system on trade allies, we asked respondents about their familiarity with, and opinion of, the star rating system.

Familiarity

Familiarity with the star rating system was fairly high among the residential trade allies (72%); overall, just over half of trade allies (52%) had heard of the star rating system (Table 63).

Table 63: Familiarity with "Star" Rating System

	SECTOR			ALL RESPONDENTS (*n* = 162)
	RESIDENTIAL (*n* = 97)	C & I (*n* = 35)	SOLAR PV (*n* = 17)	
Yes	72%	14%	18%	52%
No	25%	80%	82%	44%
Don't know	3%	6%	0%	4%

Opinions of Star Rating System

We asked trade allies who indicated familiarity with the star rating system for their opinions about its clarity, fairness, and usefulness.
Overall, 38% of respondents thought the rating system was "clear" (a "4" or a "5" on a five-point scale), compared with 27% who thought it was unclear (a "1" or a "2";

Table 64).

Table 64: Overall Clarity of Rating System

	SECTOR		
	RESIDENTIAL (*n* = 66)	NON-RESIDENTIAL (*n* = 13)	ALL RESPONDENTS (*n* = 79)
1 = Not at all clear	11%	15%	11%
2	17%	8%	15%
3	32%	54%	35%
4	17%	15%	16%
5 = Very clear	24%	8%	22%

Trade allies were fairly divided over the clarity of the criteria used in rating allies, with one third indicating that the criteria were unclear (a "1" or a "2), one third indicating they were clear (a "4" or a "5"), and one third giving a neutral rating (a "3"; Table 65).

Table 65: Clarity of Rating Criteria

	SECTOR		
	RESIDENTIAL (*n* = 61)	NON-RESIDENTIAL (*n* = 12)	ALL RESPONDENTS (*n* = 73)
1 = Not at all clear	15%	17%	15%
2	16%	25%	18%
3	34%	33%	34%
4	18%	17%	18%
5 = Very clear	16%	8%	15%

Opinions were similarly divided over the fairness and usefulness of the system, with roughly a third reporting that it is fair or useful (a "4" or a "5" on a five-point scale), unfair or not useful (a "1" or a "2") or neutral (a "3"; Table 66; Table 67).

Table 66: Fairness of Rating System

	SECTOR		
	RESIDENTIAL (*n* = 69)	NON-RESIDENTIAL (*n* = 13)	ALL RESPONDENTS (*n* = 82)
1 = Not fair at all	16%	15%	16%
2	13%	15%	13%
3	32%	54%	35%
4	17%	8%	16%
5 = very fair	22%	8%	20%

Table 67: Usefulness of Rating System

	SECTOR		ALL RESPONDENTS (*n* = 82)
	RESIDENTIAL (*n* = 69)	NON-RESIDENTIAL (*n* = 13)	
1 = Not useful	20%	23%	21%
2	16%	15%	16%
3	26%	46%	29%
4	19%	15%	18%
5 = very useful	19%	0%	16%

We also asked respondents about whether the star rating system would be applicable to trade allies in the commercial sector (Table 68). Very few respondents expressed strong views (either a "1" or a "5" on a five-point scale), but opinions were divided: 30% believed it was applicable (a "4" or a "5"), 26% believed it was not applicable (a "1" or a "2"), and the rest were either neutral or didn't know.

Table 68: Applicable to Commercial Sector

RESPONSE:	SECTOR		ALL RESPONDENTS (*n* = 83)
	RESIDENTIAL (*n* = 70)	NON-RESIDENTIAL (*n* = 13)	
Definitely	10%	8%	10%
Probably	20%	23%	20%
Maybe	16%	31%	18%
Probably not	20%	23%	20%
Definitely not	6%	8%	6%
Don't know	29%	8%	25%

Finally, we asked trade allies for suggestions about how the star rating system could be improved. Thirty allies had comments, with various opinions (Table 69). Additionally, three trade allies commented that they found the ratings difficult to locate on the website.

Table 69: Star Rating System Improvement Suggestions (Multiple Responses Allowed)

TOPIC	MENTIONS
Should rate quality, not quantity of jobs - hard for new and smaller trade allies to compete	9
Eliminate it	7
Allow customer comments to appear	2
Include territory/ location considerations	2

TOPIC	MENTIONS
Add a separate, home performance-specific rating	2
Other	10

All comments appear in the appendix. A sample of specific comments appears below:

- "Any rating should be based on quality, reliability and trustworthiness, NOT on volume."
- "Maybe by using a 'new trade ally' designation for a fixed period of time for new contractors, rather than penalizing them for being new."
- "New descriptive language is much better. Maybe use something other than stars. Leaves for example, seem to represent a commitment to the environment as opposed to stars which often seem to indicate quality only. Perhaps, an energy star logo could be placed next to the HP contractors and others who have produced high energy savings."
- "Maybe a scale that shows high to low amount of jobs done and a scale of QC average by number done."
- "Do not base it on the number of jobs completed, but on the quality of work, or average it. There is no way for a mom & pop construction company to compete with a company that has a crew."

5 RELATIONSHIP WITH ENERGY TRUST

This section presents and summarizes findings about trade allies' satisfaction with and perceptions of Energy Trust. In this section, we explore several topics:

- The degree of satisfaction that trade allies have with Energy Trust and its staff.
- Changes in trade allies' relationship with Energy Trust.
- Perceptions of Energy Trust.

These results will be presented in two sub-sections, specific to trade allies working primarily on energy efficiency programs, and on renewable energy programs. The final portion of this section presents trade allies' general comments about Energy Trust.

ENERGY EFFICIENCY TRADE ALLIES

This section presents responses from trade allies who primarily work in energy efficiency programs, including residential, commercial, and industrial sector trade allies. [10]

Satisfaction

Trade allies were given a series of categories for which they were asked to rate their satisfaction on a scale from "1" ("Very unsatisfied") to 5 ("Very satisfied"). Figure 5 shows satisfaction ratings for all respondents, and Table 70 shows the percentage of respondents who indicated satisfaction (rated a "4" or a "5") on each element.

[10] This section also includes responses from respondents who did not indicate which sector they work in.

Figure 5: Level of Satisfaction with Energy Trust and Staff

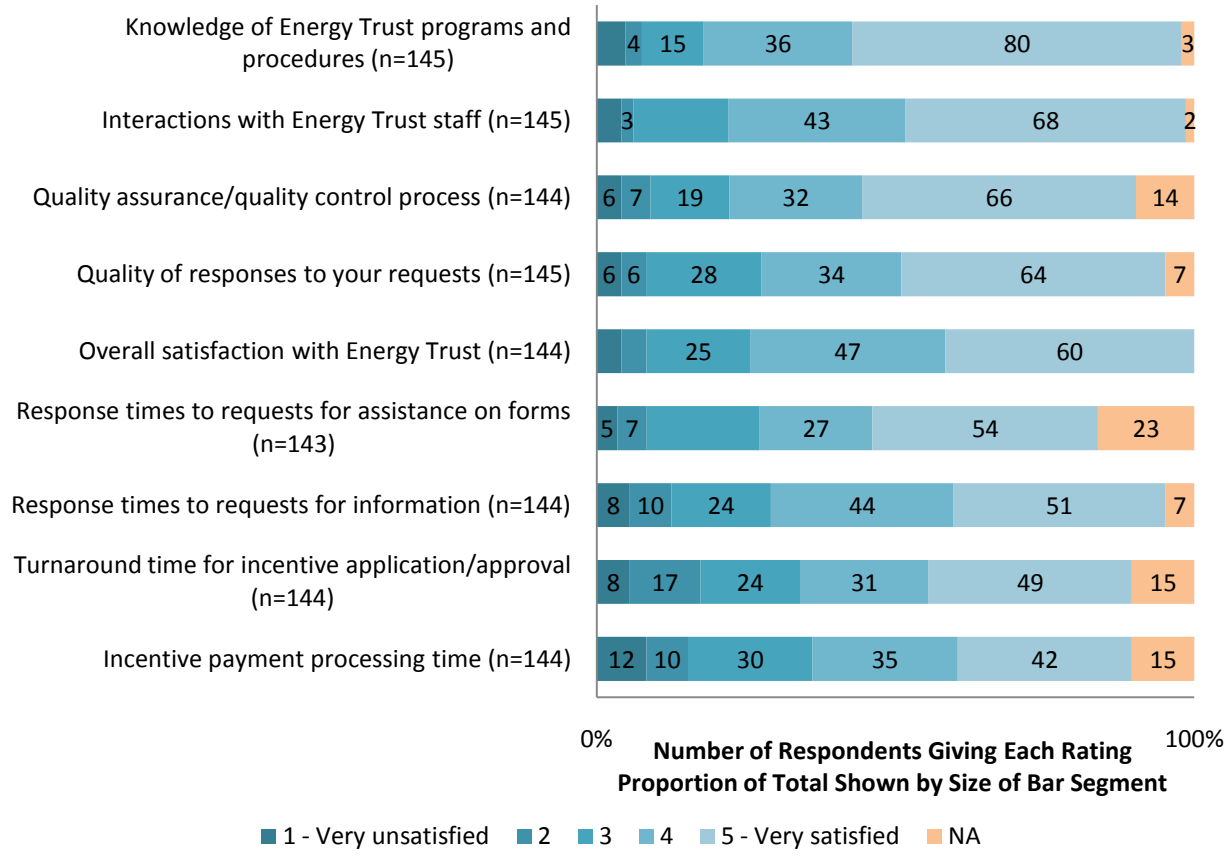


Table 70: Satisfaction with Energy Trust and Staff by Sector

STATEMENT	PERCENTAGE OF RESPONDENTS GIVING SATISFACTION RATING OF "4" OR "5"		
	SECTOR		ALL ENERGY EFFICIENCY RESPONDENTS (*n* = 145)
	RESIDENTIAL (*n* = 103)	C & I (*n* = 38)	
Knowledge of Energy Trust programs and procedures	80%	82%	80%
Interactions with Energy Trust staff	76%	79%	77%
Overall satisfaction with Energy Trust	72%	81%	74%
Quality assurance/quality control process	69%	68%	68%
Quality of responses to your requests	66%	73%	68%
Response times to requests for information	66%	71%	66%

STATEMENT	PERCENTAGE OF RESPONDENTS GIVING SATISFACTION RATING OF "4" OR "5"		
	SECTOR		ALL ENERGY EFFICIENCY RESPONDENTS (*n* = 145)
	RESIDENTIAL (*n* = 103)	C & I (*n* = 38)	
Response times to requests for assistance on forms	57%	58%	57%
Turnaround time for incentive application/approval of paperwork	56%	58%	56%
Incentive payment processing time	58%	47%	53%

Overall, trade allies were satisfied with Energy Trust. The areas in which respondents indicated the most satisfaction were staff's knowledge of Energy Trust programs and procedures, and interactions with Energy Trust staff. The overall level of satisfaction with Energy Trust remained at 77% this year. The areas in which trade allies were least satisfied continued to be incentive payment processing time and turnaround time for incentive application/approval of paperwork. The mean satisfaction rating for incentive processing time continues to decrease, going from 3.6 in the 2010 survey to 3.3 this year.

Payment and paperwork processing times had similar levels of satisfaction as the year before, and less than one third of those expressing dissatisfaction with processing times expressed dissatisfaction overall with Energy Trust. Dissatisfaction with these areas, as well as overall dissatisfaction with Energy Trust, was not concentrated in any particular service type (HVAC, air sealing, and so forth) among either residential or commercial trade allies.

Satisfaction with response times to requests for assistance on forms decreased from 73% last year to 57% this year. Over half of the respondents who expressed dissatisfaction with response times to requests for form assistance also expressed dissatisfaction with Energy Trust overall.

Changes in Relationship

Trade allies continue to see their relationship with Energy Trust as improving. Almost half of respondents (44%) see their working relationship with Energy Trust as improving, compared with only 8% of respondents who see it as deteriorating (

Table 71). Ratings of relationship change were the least favorable among residential sector trade allies: residential sector allies were the only ones who rated their relationship as deteriorating.

Table 71: Change in Working Relationship with Energy Trust since Last Year

STATEMENT	PERCENTAGE OF RESPONDENTS		
	SECTOR		ALL ENERGY EFFICIENCY RESPONDENTS (*n* = 141)
	RESIDENTIAL (*n* = 99)	C & I (*n* = 38)	
Improved a lot	7%	18%	10%
Improved	28%	47%	34%
Stayed the same	54%	34%	48%
Gotten worse	8%	0%	6%
Gotten a lot worse	3%	0%	2%

The 11 residential trade allies who indicated that their Energy Trust relationship was deteriorating provided varied responses. These trade allies were distributed across several types of services provided. Many provided detailed explanations for their dissatisfaction. The most common explanations were Energy Trust staff's unresponsiveness to questions and requests (3 responses) and excessive data or documentation requirements (3 responses). Two explanations concerned the elimination of gas furnace rebates, and two concerned complaints about the star rating system. See Appendix for verbatim responses.

Trade Allies also provided explanations for why their relationship with Energy Trust had improved over the past year (Table 72). The most common explanation was the development of a good working relationship with specific program staff (44%).

Table 72: Explanation of Improvement in Energy Trust Relationship

STATEMENT	PERCENTAGE OF RESPONDENTS		
	SECTOR		ALL ENERGY EFFICIENCY RESPONDENTS (*n* = 62)
	RESIDENTIAL (*n* = 35)	C & I (*n* = 25)	
I (we) developed a good working relationship with specific Energy Trust program staff	46%	40%	44%
I became more familiar with Energy Trust programs	34%	24%	29%
Energy Trust program staff became more responsive to my questions	11%	24%	18%
Incentive applications were processed quickly	3%	12%	6%
Data or documentation requirements became easier	6%	0%	3%

Perceptions of Energy Trust

This year we again asked a set of questions on how the market perceived Energy Trust. Just over half of trade allies (58%) working in the energy efficiency field felt that Energy Trust understands the demands of the market environment, unchanged from last year (Table 73). Trade allies had high levels of agreement that staff members and customers respect Energy Trust (82% and 73%, respectively). For the most part, disagreement (a rating of a "1" or a "2" on a five-point scale) with these statements was low.

Table 73: Agreement with Statements of Perceptions of Energy Trust

STATEMENT	PERCENTAGE OF RESPONDENTS RATING AGREEMENT AS "4" OR "5" ON 5-POINT SCALE		
	SECTOR		ALL ENERGY EFFICIENCY RESPONDENTS (*n* = 145)
	RESIDENTIAL (*n* = 103)	C & I (*n* = 38)	
Our staff members respect Energy Trust	79%	92%	82%
Our customers respect Energy Trust	71%	82%	73%
Energy Trust understands the current demands of the market environment	54%	68%	58%

SOLAR AND RENEWABLES TRADE ALLIES

This section presents responses from trade allies who primarily work in renewable programs.

Satisfaction

Trade allies were given a series of categories for which they were asked to rate their satisfaction on a scale from "1" ("Very unsatisfied") to 5 ("Very satisfied"). Figure 5 shows the satisfaction ratings for all respondents, and

Table 74 shows the percentage of respondents who indicated satisfaction (rated a "4" or a "5") on each element, by sector.

Because of the small number of respondents in the renewables sector (27), all comparisons below should be interpreted cautiously.

Figure 6: Satisfaction Ratings of Energy Trust and Staff

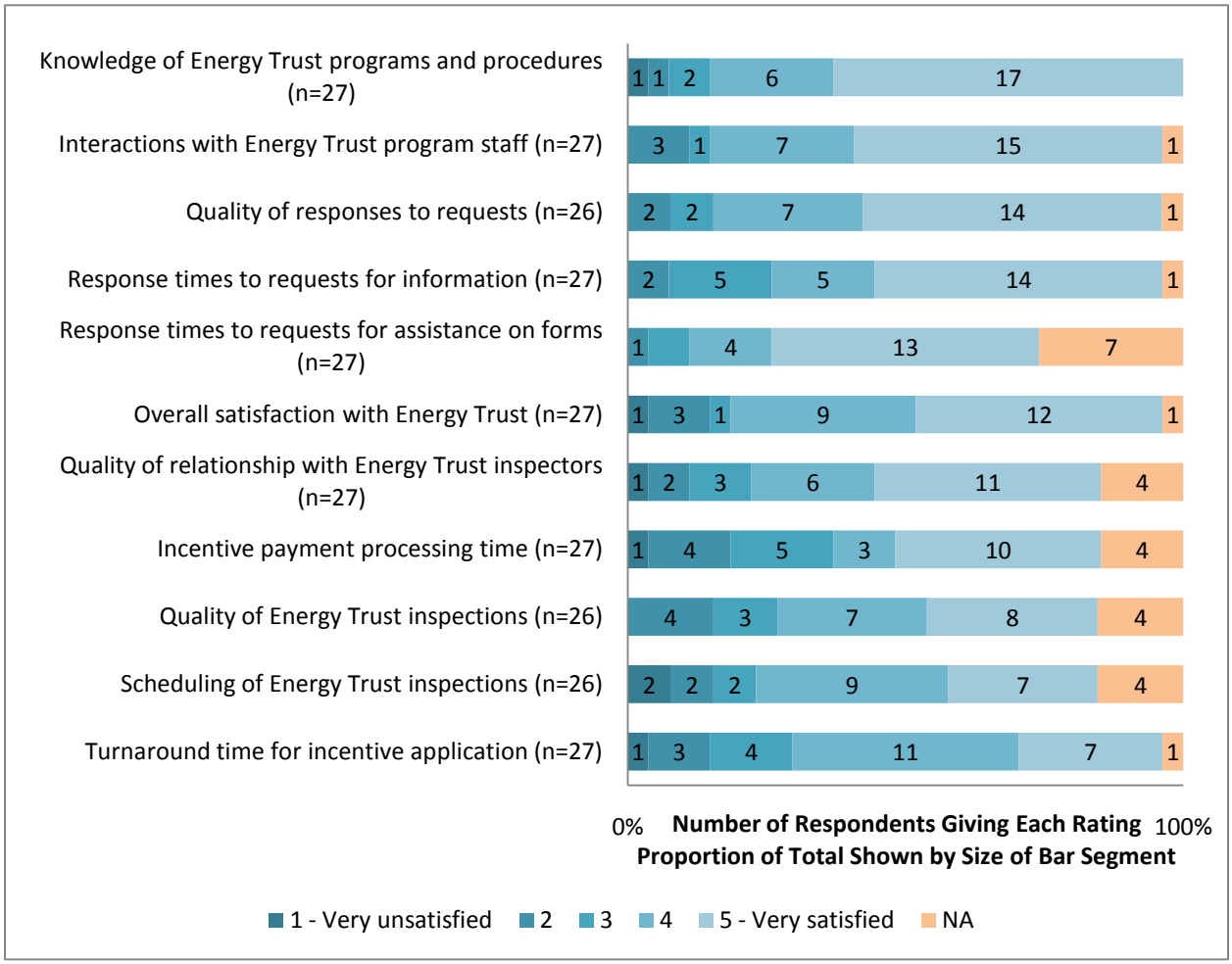


Table 74: Energy Trust Satisfaction by Sector

SATISFACTION CATEGORY	NUMBER OF RESPONDENTS GIVING SATISFACTION RATING OF "4" OR "5" ON A 5-POINT SCALE			
	SECTOR		ALL SOLAR AND OTHER RENEWABLE RESPONDENTS (*n* = 27)	
	SOLAR PV (*n* = 18)	OTHER RENEWABLES (*n* = 9)	COUNT	PERCENT
Knowledge of Energy Trust programs and procedures	17	6	23	85%
Interactions with Energy Trust program staff	16	6	22	81%
Quality of responses to requests	16	6	22	81%
Overall satisfaction with Energy Trust	15	6	21	78%
Response times to requests for information	15	4	19	70%
Turnaround time for incentive application/approval of paperwork	14	4	18	67%
Response times to requests for assistance on forms	13	4	17	63%
Quality of your relationship with Energy Trust inspectors	13	4	17	63%
Scheduling of Energy Trust inspections	13	4	17	62%
Quality of Energy Trust inspections	12	4	16	58%
Incentive payment processing time	9	4	13	48%

The overall satisfaction with Energy Trust amongst solar and renewables allies remains quite high. A majority of respondents (78%) were satisfied (a "4" or a "5" on a five-point scale) with Energy Trust overall. A notable exception is payment processing time, where satisfaction remains low (48%). Ratings of the turnaround time for incentive applications improved from last year, with a 12% increase in the percent of satisfied respondents, to 67%. Trade allies in the Solar PV sector gave generally higher satisfaction ratings than allies in the other renewables sector.

Changes in Relationship

Similar to the energy efficiency trade allies, almost half of renewable sector trade allies reported an improvement in their relationship with Energy Trust over the past year (Table 75). Half reported that the relationship had not changed.

Table 75: Change in Working Relationship with Energy Trust Since Last Year

COMMENT	SECTOR		ALL SOLAR AND OTHER RENEWABLE RESPONDENTS (*n* = 24)	
	SOLAR PV (*n* = 16)	OTHER RENEWABLES (*n* = 8)	COUNT	PERCENT
Improved a Lot	0	1	1	4%
Improved	7	2	9	38%
Stayed the Same	8	4	12	50%
Gotten a lot Worse	1	1	2	8%

The two respondents who indicated that their relationship with Energy Trust deteriorated provided multiple different reasons, which can be seen in the Appendix.

The 10 respondents who indicated an improvement in their Energy Trust relationship also provided an explanation (Table 76). The most common reason was becoming more familiar with Energy Trust programs. Two respondents also provided other reasons, which appear in the Appendix.

Table 76: Explanation for Improvement in Working Relationship with Energy Trust (Multiple Responses Allowed)

REASON	SECTOR		ALL RESPONDENTS (*n* = 10)
	SOLAR PV (*n* = 7)	OTHER RENEWABLES (*n* = 3)	
I became more familiar with Energy Trust programs	5	1	6
I (we) developed a good working relationship with specific Energy Trust staff	2	1	3
Data or documentation requirements became easier	2	1	3
Incentive applications were processed quickly	2	0	2
Energy Trust program staff became more responsive to my questions	1	0	1

Perceptions of ETO

This year we again asked questions on how the market perceived Energy Trust. About half of the renewable trade allies (56%) felt that Energy Trust understood the demands of the market environment. A majority of respondents also believed that their staff and customers respect

Energy Trust (77% and 69%, respectively). Although the small number of respondents precludes a statistical comparison, Solar PV sector trade allies generally gave higher ratings than other renewable sector trade allies in response to these questions.

Table 77: Perceptions of Energy Trust

COMMENT	SECTOR		ALL SOLAR AND OTHER RENEWABLE RESPONDENTS (*n* = 27)	
	SOLAR PV (*n* = 18)	OTHER RENEWABLES (*n* = 9)	COUNT	PERCENTAGE*
Our staff members respect Energy Trust	17	4	21	77%
Our customers respect Energy Trust	13	6	17	69%
Energy Trust understands the current demands of the market environment	11	4	16	56%

*Percentages reflect the proportion of respondents that agreed with the statement (a rating of "4" or "5" on a five-point scale).

FINAL COMMENTS

At the end of the survey, trade allies had the opportunity to provide additional comments or suggestions for Energy Trust. Sixty trade allies provided comments or suggestions – about one-third of all respondents. Of those, 19 were explicitly positive and 10 explicitly negative. The comments were often about very specific topics and, as such, are difficult to summarize. A summary of the most frequent topics appears below (Table 78).

Table 78: Topics Covered by Final Comments (Multiple Responses Allowed)

TOPIC	NUMBER OF RESPONDENTS
Incentives	9
Staff and communication	8
Simplification of processes	7
Roundtables or training	7
Advertising	3
Other	40

Comments related to incentives typically were requests for higher incentives in general or for incentives for specific applications (geothermal, solar, gas furnace, HVAC). The staff/communications comments were mainly split between positive (4) and negative (7). Comments regarding the processes mainly addressed simplifying the paperwork. The roundtable

and training comments were both positive and negative. Comments classified as "other" spanned a range of topics, none of which was mentioned by more than two respondents. The responses appear in the Appendix.

6 SECTOR-SPECIFIC FINDINGS

RESIDENTIAL TRADE ALLIES

This year, 105 trade allies reported that they worked mainly in the residential sector. In the 2011 Trade Ally survey, we identified the primary equipment and services provided by these trade allies, rather than the primary programs with which they worked.

Trade allies identified a wide variety of primary services provided or equipment installed in 2010 (Table 79). The most frequent responses were heat pumps (20%), insulation (15%), windows (13%) and air sealing (12%). HVAC equipment and services were the most popular measures with almost half of respondents installing either heat pumps, gas furnaces or duct sealing and insulation. The "other" responses mainly specified that respondents provided a combination of these services (see Appendix).

Table 79: Primary Equipment or Service Provided in 2010

SERVICE PROVIDED	PERCENT OF RESPONDENTS (*n* = 105)
Heat Pump	20%
Insulation	15%
Windows	13%
Air Sealing	12%
Duct Sealing and Duct Insulation	11%
Gas Furnace	9%
Ductless Heat Pump (DHP)	9%
Water Heater	5%
New Site-Built Home	3%
Other	5%

Gas Furnaces

Nine trade allies reported that they primarily installed gas furnaces for Energy Trust, eight of whom answered questions about gas furnace installation. Similar to last year, most of these trade allies said that at least 90% of the gas furnaces they installed were 95% efficient or better, and all but one said that at least 70% of the gas furnaces met or exceeded the 95% level. These findings were similar among new home furnace installations, where only one respondent indicated occasionally (10% of the time) installing a furnace with less than 90% efficiency. These results remained true regardless of whether we weighted responses by firm size.

When asked to estimate the cost differential between a standard condensing (90% efficient) furnace and a high efficiency condensing furnace (>95% efficient) seven of the nine respondents estimated the incremental cost as under $750 (Table 80).

Table 80: Estimated Cost Differential (Equipment and Installation) between a 90% Efficient Furnace and a High Efficiency 95% Condensing Furnace

DIFFERENCE	NUMBER OF RESPONDENTS (*n* = 9)
Less than $200	2
$201 to $500	1
$501 to $750	2
$751 to $1,000	1
$1,001 to $1,250	1
Don't know	2

Respondents indicated a range of frequencies of installing furnaces with an ECM (electronically commutated motor) or an air cleaner: reported frequencies ranged from 10% to 100% of the time. Although the sample size of eight precludes a statistical comparison, larger firms tended to install furnaces with these features more frequently than smaller firms. Six respondents estimated the additional cost of an ECM. Five of the six estimated the additional cost as between $200 and $750.

Heat Pumps

Twenty-one respondents reported primarily installing heat pumps in their work with Energy Trust. Although ductless heat pumps will be discussed below, it should be noted that 18 of these trade allies indicated that they also installed ductless heat pumps in 2010. In 2010, as in 2009, a large majority of the installations were 9.0 HSPF or higher (Table 81).

Table 81: Percent of 2010 Heat Pump Sales by Efficiency

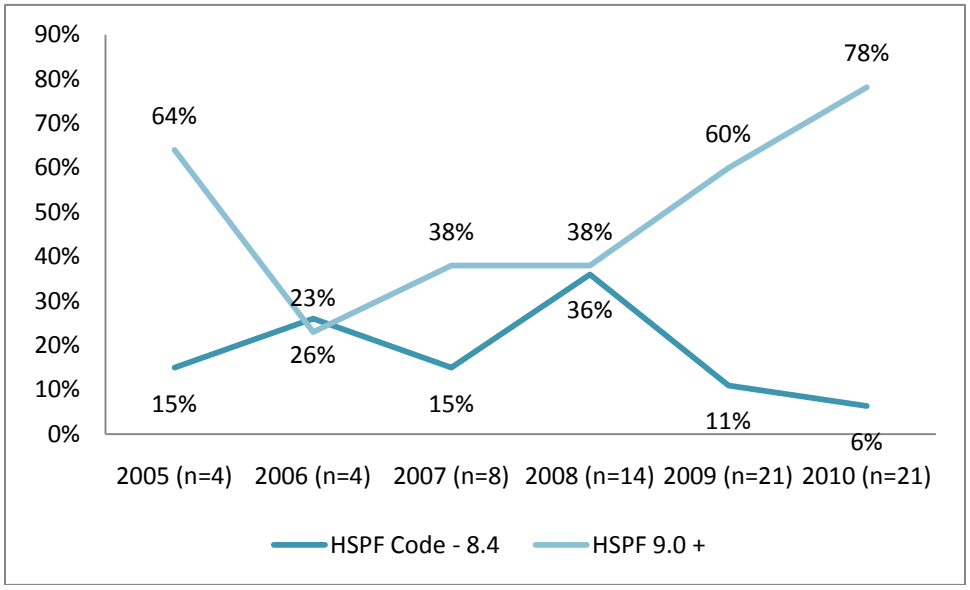
EFFICIENCY	MEAN PERCENT OF INSTALLATIONS (*n* = 21)	
	UNWEIGHTED	WEIGHTED BY FRIM SIZE
HSPF 9.5 or better	23%	27%
HSPF 9.0 to 9.4	49%	51%
HSPF 8.5 to 8.9	17%	15%
HSPF 8.2 to 8.4	2%	2%
Code HSPF	5%	4%

Note: Because of missing responses, percentages do not sum to 100%.

The use of high efficiency heat pumps may partly be influenced by the federal tax credit requirements as well as Energy Trust's providing incentives only for heat pumps with an HSPF of 9.0 or better.

Figure 7 plots the percentage of respondents' heat pump sales by HSPF level, as reported in the last six trade ally surveys. Higher efficiency models (HSPF 9 or more) appear to have regained, or even slightly increased their market share, and the lowest-efficiency models (HSPF code through 8.4) continue to lose market share.

Figure 7 : Heat Pump by Efficiency over Time



The cost differential between a code heat pump (7.8 HSPF) and a high-efficiency heat pump (9 HSPF) has been relatively stable over the last several years, with most respondents indicating that the differential is over $1,250 (Table 82).

Table 82: Estimated Cost Differential (Equipment and Installation) between a Code (7.8 HSPF) Heat Pump and a High-Efficiency Heat Pump (9 HSPF)

ADDITIONAL COST	PERCENT OF RESPONDENTS (*n* = 18)	
	UNWEIGHTED	WEIGHTED BY FIRM SIZE
$501 to $750	6%	8%
$751 to $1,000	17%	16%
$1,000 to $1,250	28%	18%
Over $1,250	50%	56%

Commissioning continues to be on the rise with nearly three quarters of respondents reporting that they commissioned 75% or more of their heat pumps (Table 83). However, there is still some room to increase this practice through training and incentives, as more than one-quarter of the respondents indicated they used commissioning less than half the time.

Table 83: Percent of Jobs that Use Commissioning

PERCENT OF JOBS	NUMBER OF RESPONDENTS (*n* = 21)	
	UNWEIGHTED	WEIGHTED BY FIRM SIZE
0%	3	1
1 to 24%	3	3
25% to 49%	3	1
50% to 74%	1	0
75% to 100%	11	16

The three most common reasons given for not using commissioning were that there was no need for it, it was too expensive, and that it takes too long (Table 84). Five respondents also provided various other reasons, including that it does not apply for tax incentives (two mentions), that they do not need it, that they were waiting to take the class, or that they use it only on tax credit jobs,

Table 84: Reasons for Not Using Commissioning (Multiple Responses Allowed)

REASON	NUMBER OF MENTIONS (*n* = 21)
No customer demand	7
Too expensive	4
Takes too much time	2
Other	6

Trade allies were again asked about how often they install temperature cut-out controls. The majority reported installing cut out switches on 75% or more of projects (

Table 85). Only three respondents reported installing temperature cutout switches less than half the time, and the rest were unsure. When the results were weighted by firm size, no respondents indicated that less than three-fourths of their jobs included a temperature cutout switch.

Table 85: Percent of Jobs that Install a Temperature Cutout Switch

PERCENT OF JOBS	NUMBER OF RESPONDENTS (*n* = 21)	
	UNWEIGHTED	WEIGHTED BY FIRM SIZE
0%	1	0
1% to 24%	1	0
25% to 49%	1	0
50% to 74%	0	0
75% to 99%	6	10
100%	8	7
Don't know	4	2

Heat Pump Summary and Recommendations

The market share of high efficiency heat pumps (HSPF 9.0 or greater) continues to increase. A majority of contractors do commissioning and install temperature cutout switches on the majority of their projects, and the incidence of these practices continues to increase. Nevertheless, Energy Trust should continue to promote these practices through incentives, program specifications and trade ally training.

Ductless Heat Pumps

Nine residential sector respondents reported that in their work with Energy Trust they mainly installed ductless heat pumps (DHPs). Of these respondents, four reported installing fewer than 10 DHPs in 2010, one reported installing between 10 and 20 DHPs, and four reported installing more than 20 DHPs. Eight respondents indicated the percentage of DHPs they sell at different efficiency levels (Table 86).

Table 86: Percent of DHP Installations across Efficiency Levels (*n* = 8)

EFFICIENCY:	WEIGHTING	PERCENT OF INSTALLATIONS			
		0% TO 20%	30% TO 60%	70% TO 90%	100%
Below 20 SEER	Unweighted	2	0	1	3
	Weighted	1	0	1	4
20 to 24 SEER	Unweighted	1	0	2	1
	Weighted	1	0	2	1
25 SEER or higher	Unweighted	3	0	0	1
	Weighted	4	0	0	0

Four of those eight respondents indicated that more than 70% of the DHPs they install are below 20 SEER, while three respondents indicated that more than 70% of the DHPs they install are 20 SEER or above.

We also asked respondents about the sizes of DHPs they typically install (Table 87). Although not all respondents fully answered the question, respondents reported installing multiple sizes of DHPs, with small to mid-size units making up a majority of most installers installations.

Table 87: Size of DHP Installations (*n* = 9)

EFFICIENCY:		PERCENT OF INSTALLATIONS			
		0%	10% TO 30%	40% TO 70%	80% TO 100%
9,000 BTU	Unweighted	0	3	3	0
	Weighted	0	2	2	0
12,000 BTU	Unweighted	0	3	4	0
	Weighted	0	4	2	0
18,000 BTU	Unweighted	0	4	2	0
	Weighted	0	5	1	0
24,000 BTU	Unweighted	0	5	1	0
	Weighted	0	4	3	0
30,000 BTU	Unweighted	0	1	1	0
	Weighted	0	1	3	0
Other	Unweighted	0	1	0	0
	Weighted	0	0	0	0

Respondents also indicated the types of DHP installations they typically install (Table 88). Again, some respondents failed to fully answer the question, but generally, respondents reported installing DHPs with two or more inside units more often than other types.

Table 88: Type of DHP Installation (*n* = 9)

INSTALLATION TYPE		PERCENT OF INSTALLATIONS			
		0%	10% TO 30%	40% TO 70%	80% TO 100%
A "single zone" DHP, with a single inside unit and a single outside unit	Unweighted	1	4	1	1
	Weighted	0	6	0	0
Multiple "single zone DHPs at one residence	Unweighted	3	1	0	1
	Weighted	4	0	0	1

INSTALLATION TYPE		PERCENT OF INSTALLATIONS			
		0%	10% TO 30%	40% TO 70%	80% TO 100%
A DHP with a single outside unit and two inside units	Unweighted	0	1	5	0
	Weighted	0	0	6	0
A "multi-zone" DHP, with a single outside unit and more than two inside units	Unweighted	1	2	2	1
	Weighted	0	2	3	0

Six of the eight respondents (seven of eight, weighted by firm size) indicated that a large majority of their DHP installations (80 to 90%) are replacing zonal heat (such as electric baseboards). Six respondents also indicated that they occasionally (10 to 20% of the time) install DHPs in previously unheated areas. Only two reported that they ever install DHPs to replace a whole-house system.

Six of eight respondents (both weighted and unweighted) indicated that all their DHP jobs are inverter-driven installations. Only one respondent reported completing no inverter-driven installations.

Finally, respondents also provided estimates of the cost of a typical single-zone, 18,000 BTU DHP installation (Table 89). Seven of eight respondents indicated that the installation would cost between $3,000 and $5,000.

Table 89: Typical Cost of Single-Zone, 18,000 BTU DHP

COST RANGE	NUMBER OF RESPONDENTS (*n* = 8)	
	UNWEIGHTED	WEIGHTED BY FIRM SIZE
$2,000 to $2,999	1	1
$3,000 to $3,999	3	5
$4,000 to $4,999	3	2
Don't know	1	0

Insulation

This year, 16 residential sector trade allies indicated that insulation was the main service they provided in association with Energy Trust in 2010.

When asked about the need for additional insulation in homes in the Energy Trust service area, responding trade allies reported that over half (60%) of all homes might benefit from additional insulation.

Air sealing continues to be a significant component of insulation services. Half of these trade allies reported that 50% or more of their jobs also had air sealing performed (Table 90). Only one respondent did not perform air sealing on any 2010 insulation jobs.

Table 90: Percentage of 2010 Insulation Jobs that Had Air Sealing Performed

PERCENT OF JOBS	NUMBER OF RESPONDENTS (*n* = 16)	
	UNWEIGHTED	WEIGHTED BY FIRM SIZE
0%	1	0
1% to 24%	3	4
25% to 49%	3	3
50% to 74%	2	1
75% to 99%	3	5
100%	4	2

Thirteen of the 16 respondents also specified which areas of the house they typically check for air leaks, the most common being windows, crawl spaces, and attic hatches (Table 91). Eleven of these 13 trade allies reported checking in nine or more locations in the house, and two reported checking in five or fewer locations.

Table 91: Locations of House Checked for Air Leaks (Multiple Responses Allowed)

PART OF HOUSE	NUMBER OF RESPONDENTS IDENTIFYING LOCATION (*n* = 16)
Window	13
Crawl Space	12
Attic Hatch	12
Doors	11
Sill Plate	11
Recessed Lights	11
Dryer Vent	10
Top Plate	10
Duct Register	10
Dropped Soffit	10
Plumbing Vent Stack	10
Outdoor Faucets	8

Duct Sealing and Duct Insulation

In the 2011 survey, 11 respondents indicated that the main service they performed in association with Energy Trust was duct sealing and insulation. A majority of the respondents focus on existing homes. Six of the 11 respondents work exclusively in existing homes, and one works exclusively in new homes. The rest report a mix of existing and new home jobs. Most of these trade allies reported performing duct sealing and insulation on 90% or more of existing homes (Table 92). Fewer reported duct sealing and insulation on new homes. The number reporting work on is too small to draw reliable conclusions. It is possible, however, that these results reflect the fact that ductless heat pumps are becoming more popular in new home construction; therefore, there is less need to perform duct sealing and insulation.

Table 92: Number of Duct Sealing and Insulation Jobs Done by Type of Construction

PERCENT OF JOBS	NUMBER OF RESPONDENTS	
	EXISTING HOMES (*n* = 10)	NEW HOMES (*n* = 5)
0%	0	1
10%	0	2
30%	1	0
60%	1	0
70%	0	1
90%	2	0
100%	6	1

Fewer than one-quarter of responding trade allies performed duct insulation on 75% of their jobs or more (Table 93). A majority of respondents performed duct insulation on fewer than one-quarter of their duct sealing jobs. These percentages are largely unchanged from the 2009 trade ally findings.

Table 93: Percentage of 2010 Duct Sealing Jobs That Also Had Duct Insulation Installed

PERCENT OF JOBS	NUMBER OF RESPONDENTS (*n* = 11)	
	UNWEIGHTED	WEIGHTED BY FIRM SIZE
0%	3	5
1% to 24%	4	3
25% to 49%	1	2
50% to 74%	0	0
75% to 99%	1	1
100%	2	1

Air Sealing

Twelve residential sector trade allies reported that their main service provided through Energy Trust was air sealing.

This year, firms continued to be divided in terms of the proportion of jobs that also had insulation installed (Table 94).

Table 94: Percent of 2010 Air Sealing Jobs That Also Had Insulation Installed

PERCENT OF JOBS	NUMBER OF RESPONDENTS		
	UNWEIGHTED (*n* = 12)	WEIGHTED BY FIRM SIZE (*n* = 12)*	WEIGHTED BY FIRM SIZE, EXCLUDING VERY LARGE FIRM (*n* = 11)**
1% to 24%	3	0	2
25% to 49%	3	0	1
50% to 74%	2	0	2
75% to 99%	2	2	6
100%	2	9	0

*Due to rounding, counts may not add to 12.

**One large firm, reporting 100%, was excluded from calculation.

Eleven respondents also identified the locations they typically check for air leaks (Table 95). Nine of the 11 respondents reported looking in eight or more locations, the most common being windows, doors, and duct registers. One of these nine also reported checking in additional locations. One additional respondent reported checking all locations according to the program guidelines.

Table 95: Parts of the House Checked for Air Leaks (Multiple Responses Allowed)

LOCATION	NUMBER OF RESPONDENTS IDENTIFYING LOCATION (*n* = 11)
Window	10
Doors	10
Duct Register	10
Dryer Vent	9
Crawl Space	9
Top Plate	9
Recessed Lights	9
Attic Hatch	9
Sill Plate	8

LOCATION	NUMBER OF RESPONDENTS IDENTIFYING LOCATION (*n* = 11)
Dropped Soffit	8
Plumbing Vent Stack	8
Outdoor Faucets	5

Water Heating

This year, six respondents that provided information on water heaters. Four of the six reported that more than 40% of the water heaters they install are gas tankless. One reported that a majority are electric tank water heaters. Because of the small number of responses, results are not compared to the 2009 trade allies.

Windows

Thirteen respondents indicated that their primary work with Energy Trust involved window installations.

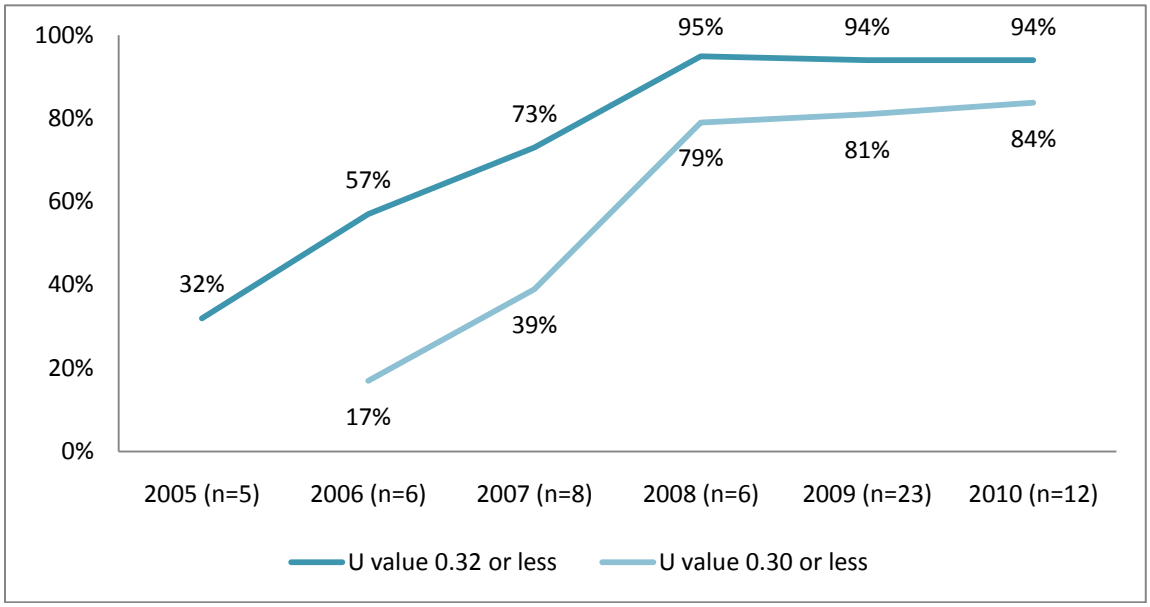
High-efficiency windows with a U-factor of 0.26 to 0.30 accounted for an average of more than 80% of installations of respondents last year (Table 96). Windows with higher efficiencies ($U \leq 0.25$) have achieved a small market share.

Table 96: Percent of 2010 Residential Windows Installations by Efficiency

EFFICIENCY (U-FACTOR)	MEAN PERCENTAGE OF INSTALLATIONS (*n* = 12)	
	UNWEIGHTED	WEIGHTED BY FIRM SIZE
0.35	1%	3%
0.33 to 0.34	2%	3%
0.31 to 0.32	4%	10%
0.26 to 0.30	93%	83%
0.23 to 0.25	1%	1%
0.22 or less	0%	0%

The reported market share gains of higher efficiency windows over the past five years remained relatively stable this year, increasing confidence in last year's findings (Figure 8).

Figure 8: Window Sales by Year



We also asked respondents about the availability of windows that qualify for Energy Trust incentives. All respondents reported that windows with a U-factor of 0.26 to 0.30 were easy to procure, and the availability of lower U-factor windows continues to improve. Contractors also seemed to be more aware of the availability highly efficient windows than last year: only two contractors replied "don't know," compared with more than half of respondents last year.

Table 97: Availability of Windows by U-factor (*n* = 12)

AVAILABILITY	U-FACTOR = 0.26 TO 0.30	U-FACTOR = 0.23 TO 0.25	U-FACTOR = 0.22 OR LESS
Not available at all	0	0	1
Difficult to get	0	3	2
Some models are available	0	5	5
Easily available	12	2	2
Don't know	0	2	2

COMMERCIAL AND INDUSTRIAL TRADE ALLIES

Thirty-two trade allies identified commercial sector work as the main work they do in association with Energy Trust. Similar to last year's findings, lighting equipment was the most common type

of equipment installed by the 28 responding commercial trade allies, followed by HVAC equipment (Table 98).

Table 98: Primary Service Provided by Commercial Allies in 2010

SERVICE PROVIDED	PERCENT OF RESPONDENTS (*n* = 28)
Lighting equipment and installation	68%
HVAC equipment and installation	21%
Refrigeration equipment and installation	4%
Windows	4%
Engineering & design: mechanical	4%

Eight trade allies identified industrial sector work as the main work they do with Energy Trust. Although there were not enough industrial sector trade allies to analyze independently, in this year's trade ally survey, we asked the same lighting questions of both commercial and industrial trade allies.

Commercial and Industrial Lighting

Four industrial sector trade allies and 22 commercial sector trade allies indicated that lighting made up the majority of their Energy Trust work. Six trade allies indicated a majority of their lighting projects were in the industrial sector, and 16 trade allies indicated that a majority of their lighting projects were in the commercial sector.

Trade allies listed the percentage of installed fixtures that were represented by various technologies in 2010 (Table 99). Although trade allies were asked to provide a percentage for each item, not all trade allies did so. Therefore, responses represent the number of trade allies that reported that a given technology represented an overall percentage of their installations.

Technology continues to shift away from older products (T12 and Standard T8s), with only a few trade allies indicating that they install these technologies. High-Performance T-8s and T-5s continue to make up a majority of installed fixtures. Ten of the 23 trade allies indicated that they install LEDs.

Table 99: Percent of 2010 Lighting Projects Represented by Various Technologies

TECHNOLOGY:	MEAN PERCENTAGE OF INSTALLATIONS (*n* = 23)*	
	UNWEIGHTED	WEIGHTED BY FIRM SIZE
High Performance T-8s	43%	41%
T-5s	27%	36%
Low-watt T-8s	11%	9%

TECHNOLOGY:	MEAN PERCENTAGE OF INSTALLATIONS (*n* = 23)*	
	UNWEIGHTED	WEIGHTED BY FIRM SIZE
CFLs	9%	6%
LEDs	9%	5%
Standard 32W T-8s	10%	2%
T-12s	7%	1%
HID	8%	1%
Incandescent	6%	1%
Other	0%	0%

*Because respondents provided responses that did not always sum to 100%, the mean percentages do not sum to 100%.

We also asked respondents about the percentage of installed watts that have lighting controls or sensors. Again, not all respondents answered all items, so the number of respondents is given to avoid overestimating the prevalence of installation. Occupancy sensors seem to be a fairly standard installed control, with respondents indicating installing them an average of 68% of the time (Table 100). Installations of other types of lighting controls seem to be slowly increasing, but overall market penetration remains low.

Table 100: Percent of 2010 Lighting Projects using Lighting Controls

TECHNOLOGY	MEAN PERCENTAGE OF INSTALLATIONS (*n* = 23)	
	UNWEIGHTED	WEIGHTED BY FIRM SIZE
Occupancy sensors	43%	68%
Sweep	4%	6%
Multi-level switching	4%	6%
Dimming only	9%	4%
Energy management system	4%	3%
Daylighting/dimming	8%	2%

Commercial HVAC

In this survey six firms provided information on the type of HVAC systems that they installed. Five firms indicated that they did a majority of their work in existing buildings, but of these, only one respondent indicated that all work was in existing buildings.

Four firms also indicated the primary type of HVAC equipment installed. Three firms indicated that they primarily installed packaged units, and one firm indicated primarily installing chillers.

Although we asked many follow-up questions of these respondents, results are not reported because of the small number of respondents.

SOLAR TRADE ALLIES

Solar Electric

Twenty trade allies installed solar electric systems in 2010. These allies were asked further questions concerning the size, type, and frequency of their solar PV projects. Almost three-fourths of respondents (13 of 18) said that over half of their 2010 revenue came from Solar PV systems (Table 101), compared with half in 2009. However, the small samples do not provide a robust test of the difference and we cannot conclude that the percentage has generally increased among trade allies.

Table 101: Percent of 2010 Revenue that came from Solar Electric Systems

REVENUE PERCENT FROM SOLAR ELECTRIC	NUMBER OF RESPONDENTS GIVING RESPONSE (*n* = 18)
1% to 24%	5
25% to 49%	0
50% to 74%	2
75% to 99%	5
100%	6

The amount of commercial work among PV sector trade allies remained unchanged from last year. Six of the responding trade allies received over half of their solar PV revenue from commercial jobs (Table 102). One quarter of solar allies undertaking solar electric projects did not have any commercial solar PV projects in 2010.

Table 102: Percent of 2010 Solar Electric Revenue that came from Commercial Jobs

REVENUE PERCENT FROM COMMERCIAL JOBS	NUMBER OF RESPONDENTS GIVING RESPONSE (*n* = 18)
0%	4
1% to 24%	6
25% to 49%	1
50% to 74%	2
75% to 99%	3
100%	1

Fewer than half of responding solar PV trade allies had enough work to sustain themselves for the next three months or longer (Table 103). One-third had no projects currently planned.

Table 103: Current Solar Electric Backlog

BACKLOG	NUMBER OF RESPONDENTS GIVING RESPONSE (*n* = 18)
Have no projects currently planned	6
Have projects to cover work for next month	4
Have projects to cover work for next 3 months	5
Have projects to cover work for next 6 months	3

This year, many solar electric trade allies continued to experience an increase in inquiries (Table 104). Almost half of responding solar trade allies (7 of 17) observed an increase over the previous year in customer inquiries concerning solar electric projects. Over a third of this year's respondents indicated that there was no change, and almost a fifth reported a decrease in inquiries, indicating that firms continue to have significantly different experiences in the marketplace.

Table 104: Observed Change in Customer Inquiries about Solar Electric in 2010 Compared to 2009

CHANGE IN INQUIRIES	NUMBER OF RESPONDENTS GIVING RESPONSE (*n* = 17)
Decreased	3
No change	7
1-24%	2
25-49%	2
50-74%	3

As with last year, a majority of responding solar PV trade allies were able to respond to all of their customer inquiries (

Table 105). The percentage of allies who were unable to respond to all leads was higher than last year (33% vs. 12%); however, the small samples do not provide a robust test of the difference and we cannot conclude that the percentage has decreased for all trade allies.

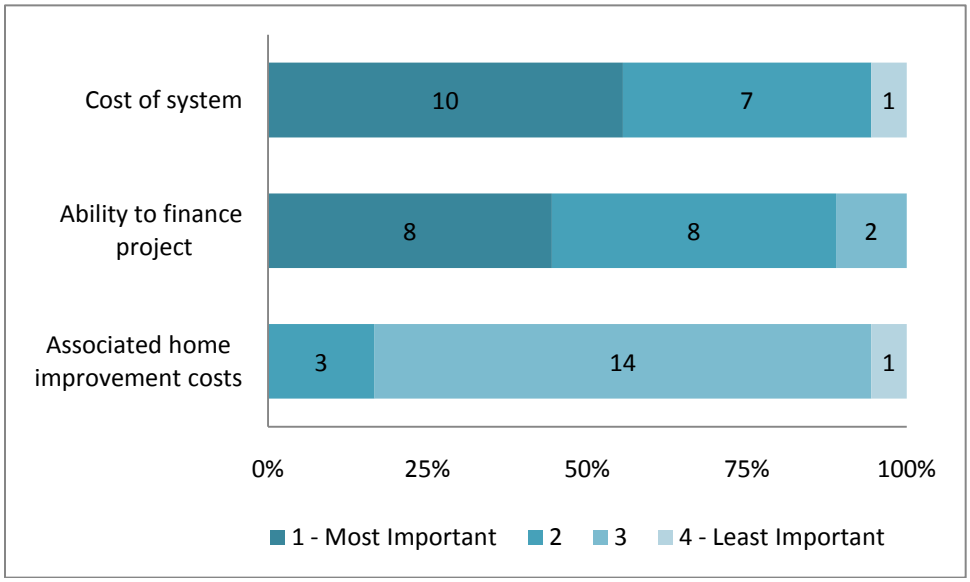
Table 105: Percent of Customer Inquiries Able to Respond to in 2010

PERCENT OF LEADS	NUMBER OF RESPONDENTS GIVING RESPONSE (*n* = 18)
100%, and was able to serve all qualified leads	10
100%, but selectively served only the highest qualified lead	2
75% to 99%	4
50% to 74%	0
Less than 49%	2

Barriers and Suggestions

We asked solar PV sector trade allies about the main barriers to projects moving forward among customers with adequate solar access. A majority of respondents (10 of 18) rated the cost of the system as the most important factor inhibiting project realization (Figure 9). No respondents rated the associated home improvement costs as the most important barrier.

Figure 9: Barriers to Project Completion (*n* = 18)



Respondents also rated the influence of the Oregon Energy Tax Credit on customers' decision to install solar PV systems. A majority of respondents (13 of 18) rated the tax credits as very influential (a "5" on a five-point scale; Table 106).

Table 106: Influence of Energy Tax Credit on Customer's Decision to Install

INFLUENCE	NUMBER OF RESPONDENTS GIVING RESPONSE (*n* = 18)
1 - No influence at all	1
2	1
3	1
4	2
5 - Very influential	13

Finally, we also asked respondents about how Energy Trust can help trade allies effectively use the Solarize initiatives. Of the six respondents, the most common response was to make the bidding process more competitive, especially for smaller firms (4 respondents). Complete responses are provided in the Appendix.

Average PV Project Size

The mean size of 2010 solar electric installations was 35 kW for commercial projects and 4.5 kW for residential projects (Table 107). The size of both installation types is similar to last year.

Table 107: Average PV Project Size

SECTOR	SIZE (kW)	
	UNWEIGHTED	WEIGHTED BY FIRM SIZE
Commercial (*n* = 14)	25.0	34.5
Residential (*n* = 6)	4.5	4.5

Solar Water Heating

This year, only five trade allies reported primarily installing Solar Water Heating systems. Although they were asked several questions regarding the size and prevalence of their solar thermal projects, these responses are difficult to interpret given the small sample size. Comparisons are not made to last years' responses.

This year, no trade allies indicated that more than half of their solar water heating revenue came from commercial firms. In fact, two of five allies indicated that none of their revenue came from commercial installations.

The size of solar water heating systems (square feet of collectors) installed in 2010 was quite variable. The residential systems ranged from 60 to 400 feet, with three respondents indicating 64 feet. For projects in the commercial sector, sizes ranged from 80 to 500 feet.

APPENDICES

APPENDIX A: VERBATIM RESPONSES

APPENDICES

A APPENDIX A: VERBATIM RESPONSES

Q7. Please select the three most common reasons you did not complete most or all of the paperwork for a customer.

Residential	At that time the customer was doing the paper work.
Residential	Completed our part but still get homeowners who didn't fill in their part but send paperwork in. it's been too confusing between state/federal. Consolidate to ONE FORM/LOCATION for paperwork to be sent.
Residential	Customer has work done by multiple companies.
Residential	Customers performing multiple measures; but only one measure with our company.
Residential	Duplication in paperwork is a bit much.
Residential	For CEWP Projects the general contractor was responsible for the paperwork. We completed all of our required paperwork.
Residential	Haven't sold the house yet. therefore no customer
Residential	I am a sub and most of the time the other company fills out the paperwork
Residential	I complete all the paper work other than the customer directed questions.
Residential	I did complete most or all of the paperwork.
Residential	I send a lot of customers to the Energy Trust that would not otherwise go through them. I do not always know if the customer is going to follow up with their end of the paperwork. We are new into home performance. We had just done windows & doors, and a second measure was necessary. I can't always make sure that the customer gets all of the paperwork done.
Residential	Just knowing what needs to be completed, with all rebate/incentive programs, not just ETO. But it's getting easier...
Residential	other contractor involved and took responsibility
Residential	This applied to only 1 customer last year. The other applications were completed by Servco.
Residential	We are already busy doing a lot of paperwork that is involved the additional time to fill it all out can get overwhelming without hiring another person to do it. This would not help keep our bottom line up and our costs to consumers down. I think they can do 10 minutes of paperwork to get hundreds of dollars for free. I usually highlight the areas they need to fill in.
Residential	We complete the form up to the point of their signature and personal information. We send to them with an addressed envelope in addition to completing much of the form for them.
Residential	We do windows only which are always part of an additional project to qualify

Residential	We haven't done a lot of Energy Trust and Energy Efficient Projects -- we help the customers when they need help . . . haven't really initiated the paperwork or sought out the projects yet.
Commercial	All I need is their signature, the rest I can do except the documentation for projects over $50,000 for the CPA letter.
Commercial	Customers are concerned that they won't get credit with ETO if someone else does the paperwork.
Commercial	The customer must fill out the app for the econo program.
Commercial	We're not a contractor, so our usual role is to help the contractor on with the ETO aspects.
Industrial	Cascade Energy Engineering does most of the paper work for our greenhouse projects but we have to feed it to them. I do not find the paperwork to be excessive.
Industrial	I tried to fill it all out for the customer
Industrial	We are just so busy on other projects that we do not have the time.
Solar PV	On bid jobs that are designed by an engineering firm the Energy Trust paper work needs to be in place before a trade ally is awarded the job. This can cause real confusion when the paperwork/site analysis is not done properly.
Other renewables	Not all paperwork was required of me. My client needed to do some of his own paperwork.
Other/Unclassified	didn't have anything to build
Other/Unclassified	I am not an ATAC so I do not submit the engineering forms. I would also offer that the Existing Building program has to supply way too many forms compared to the New Building program.
Other/Unclassified	Some information is unknown or too private
Other/Unclassified	We fill out everything except for the energy section and the house section (what year house was built etc) as the homeowner knows that not us.
Other/Unclassified	We only needed a signature from our customers...

Q8. Which staff member(s) of your firm have a significant role in processing applications for your customers?

Residential	Administrative Assistant completes all paperwork.
Residential	I complete forms staff submits the forms.
Residential	The person with the customer contact, which is me
Commercial	Lighting Specialists
Industrial	Gilbert Amestoy
Solar PV	Me

Q9. Of all the incentive paperwork completed by your company, about what percent is completed in the following locations?

Industrial	field worksheet that we made to ensure we get correct information while on site
Other/Unclassified	NA

Q10. What features would you like to see in an Energy Trust program to finance energy efficiency and renewable projects?

Residential	Allowing a program (without income restrictions) set up like Savings Within Reach where a contractor could be paid directly by Energy Trust to offset the total expense for a home. That way the homeowner would only be required to pay the net difference.
Residential	alternate rates and loans geared towards reaching low and mid income people
Residential	Customers don't care about loans, all our work done last year only 2 customers got loans. Give the customers 6-8 months to do mult measures and give them higher incentives for the more measures they complete.
Residential	don't know yet
Residential	ETO Incentives paid to contractor directly on behalf of customer.
Residential	Lower rates, ability to use incentives to buy down rates.
Residential	Payment to contractors
Residential	Rates and terms competitive with those that qualified people can obtain at credit unions
Residential	Simplicity is key. If we have the ability to give our customers an answer on approval within minutes as we do with our other financing options, it greatly improves our closing of the proposed work. Simplicity and speed, that's what I want.
Residential	To be quite honest, I was not aware of any financing options offered through the Energy Trust. I would like some information to review.
Residential	Very low interest rates. Possible transfer to new owner with sale of home i.e. renewables and extensive fixes over $20-25K. I'm surprised to be finding homes without wrap in central OR. How did they get away with that in the 90's?
Residential	want them to be able to finance the whole project that we are doing for them that includes the energy efficient options not just part of it as long as it has all ran through us the ETO dealer.
Residential	We've signed up to be a partner, but haven't really done any work with Energy Trust projects yet. HAVE has customers buy energy efficient appliances and helped them through the tax credit paperwork.
Residential	Work something out with ODOE to make thing better for the customer.
Commercial	Better Tax Incentives with the ability to capitalize on them in shorter time.
Industrial	Cascade energy has been super helpful. Particularly Paul Warila and Jerry harris
Industrial	Faster BETC #'s being mailed

Solar PV	Any options that assist financing renewable projects are helpful.
Solar PV	Anything to reduce or mitigate the ""upfront"" out of pocket costs of clients. Loan or leasing programs or other financing vehicles would be most helpful.
Solar PV	This seems an oddly worded question ... I'm unaware that ETO engages in lending/financing
Other/Unclassified	We are not dealing with loan projects - only incentive programs

Q11. Which of the following best describes your firm's experience with energy financing programs, such as the Green Street program through Umpqua Bank?

Residential	1st Security
Residential	Dealer financing, Wells Fargo
Residential	Don't get many projects that need financing; those that do usually find their own.
Residential	First Security (10-year ""0"" down), Wells Fargo (several choices. Our most popular are 5.9% with payments of 1.75% of the unpaid balance and anywhere from 6 months to 36 months, no interest)
Residential	Great product. Clean Energy Works' higher incentives makes it difficult to promote their product. However, I want to support them because I feel that their program could be around for a long time to come and is an important part of EE programming.
Residential	Have had no success getting clients approved so we do not promote Green Street.
Residential	Have never done a Green Street loan. Do not find this program attractive for customers.
Residential	I have talked a number of people into applying in the past, but not one of them was ever approved, so I no longer bring it up.
Residential	Loans & financing through local utilities.
Residential	Most of our projects are under $2000.00. We have not seriously looked into financing options.
Residential	We actively promoted the Green Street program, however the opinions of our customers was that the process was too daunting and we were unable to get any of our customers approved by Umpqua Bank, we have had more success with GE Money.
Residential	We're just getting up to speed and hope to put some programs in place this year.
Residential	Would like more information on this subject.
Residential	Would like to know more and promote it!
Commercial	All my clients pay for the work in full without need for any financing
Industrial	Graybar Financial Services
Solar PV	Prosper.com/looking for other PPA programs.

Solar PV	To very limited effect - entry-level and suburban markets seem confused and put-off by odd, strange, unknown, innovative...
Solar PV	Tried promoting Green Street- unsuccessfully.
Other renewables	The program does not offer enough funding for our small wind projects. We have referred our customers to Green Street, but all have chosen their local banks or credit unions for funding.
Other/Unclassified	GE Money

Q14. Energy Trust currently uses the insurance tracking company EBIX to track insurance status for all trade allies and verify that policies are up to date. In your interactions with EBIX over the past year, which, if any, of the following have occurred?

Residential	EBIX was a complete headache to work with. They caused a lot of work for me and my insurance co.
Residential	My insurance and bond checks were cashed 15-17 days before due. My license was suspended and my name dropped from ETO site. I do not know Who dropped the ball on this process. ETO had their Certificate Holders copy form the insurance company but CCB did not??? Why did they have to wait for CCB?
Residential	Only received one notice just prior to them removing us from the list
Residential	The problems that I faced seemed to result from communication between EBIX & ETO.
Residential	They sucked
Industrial	They are EXTREMELY dense. They alone regularly cause me to completely dump the Energy Trust. I don't have time to re-submit documentation as frequently as monthly. We work regularly with some of the largest companies in Oregon and they have no problem with our certificates but EBIX seems to. Their responses are generally unclear and unspecific.

Q18. What are the main barriers to serving areas in Southwest Washington?

Residential	There is a larger percentage of electric only homes. These homes then go through Clark Public Utilities for incentives. One barrier I have found is making sure the homeowner gives the correct information on their heating systems, over the initial phone call, so that we know they do in fact qualify for Energy Trust incentives. My dealings with Clark Public Utilities have been sour. There customer service is poor. I believe that certain homeowners may not be interested in the incentive route (even if they do fall into the Energy Trust NW Natural territory) because they have heard the stories of others trying to navigate the Clark Public Utilities maze.
Residential	This is just my best guess. We may not be on the list that is handed out in Washington.
Residential	Travel time
Residential	Very few of my customers use Natural Gas.
Commercial	Lack of my company's awareness that incentives were available in SW Washington through the ETO

Q21. Please rank the top three items in terms of how much they would help increase your customers' use of energy tax credits.

Residential	I don't do paperwork to tax credits I give the customer information they will need.
Residential	I have been blind-sided several times in the past by promising clients these credits only to find out that some obscure thing nixes it, and then I wind up either looking bad or making up the difference. Just went through it recently because the new furnace/heat pump combo needed a coil that was too big for the existing space. The reconfigured system did not meet ODOE standards, so the tax credit flew away and I lost $550. I do not think it has any positive bearing on people's decisions and I would just like to see it go away, the sooner the better.
Residential	I'd rather see ETO manage these credits and the associated paperwork. Instead of separate forms for RETC, I'd like to be able to complete all needed info on one ETO form. ETO does the best at managing these things. RETC staff are a pain to work with.
Residential	It would be very advantageous in gaining customers for our company, to make sure that PCTS is EQUAL to the Proctor ""check me"". The ONLY incentive offered in the State of Oregon that a PTCS Certified Technician is NOT able to do is the tax credit thru ODOE for Air Conditioners and Diagnostics. I have had customers not use our company for jobs only because of the Energy Trust verbiage when it comes to ""check me"". I have tried to explain that PTCS and Proctor Check Me are the SAME certification when it comes to the ENERGY TRUST, but they don't get it and they are looking for that incentive. I am willing to talk more to someone to explain or discuss this matter. I have done hours and hours of research and phone calls to understand and implement all incentives for customers. I have spoken with.....Fluid Marketing Strategies, Eco's Consulting, Oregon Dept. of Energy, Canby Utilities, BPA, NW Ductless, Energy Trust (nearly all departments), Proctor Engineering, PTCS, Efficiency Services, you name it - I have done it. Wow, is it a full time job or what?
Residential	New program for duct seal jobs is not working for us and we have chosen not to participate in the process. We pay the 45.00 fee on all of our duct seal jobs so that we can give all ETO & ODOE docs to the customer at the time of the final walk through on the job. When a customer receives tax credit docs from ETO weeks after the project completion, it confuses them and we spend a lot of time clearing up questions for them. Although the ETO is covering the testing fees with PTCS, it has not been a cost effective way for us to manage the process with our customers and we choose not to participate.
Residential	Simplify qualifications; Increase tax credit amounts. Tax credits are not substantial to purchasing decisions.
Industrial	BETC at times is a negative selling point. Customers often have a bad sense about the program from media coverage.
Solar PV	providing more credits
Other renewables	More incentive money for the customers and less money spent on Energy Trust programs.

Q23. In 2010, was your firm's work with Energy Trust primarily on energy efficiency projects or renewable energy projects?

Other/Unclassified	Equally balanced

Other/Unclassified	Gas fireplaces
Other/Unclassified	new company that was just starting business in November
Other/Unclassified	We became a trade ally in 2010 but most of our interaction will be in 2011 - energy efficiency projects

Q24. In which sector did your firm do MOST of its 2010 Energy Trust energy efficiency work?

Other/Unclassified	Healthcare

Q25. In which area did your firm do MOST of its 2010 Energy Trust renewable energy work?

Other renewables	ground source heat pump and solar hot water system
Other renewables	Our business in pretty evenly divided between solar thermal and solar electric

Q26. What was the MAIN equipment you installed or service you provided in 2010 that received Energy Trust incentives?

Residential	A combination of air sealing, duct sealing, insulation, DHW & HVAC on all jobs.
Residential	An equal amount of Gas furnaces, heat pumps and DHPs
Residential	General Contracting
Residential	MOBE Program
Residential	multiple measures on jobs

Q27. What was the MAIN equipment that you installed or service you provided in 2010 that received Energy Trust incentives?

Commercial	Commercial Laundry Equipment and Ozone water systems
Commercial	HVAC Wholesale Distribution
Commercial	Infrared Radiant Heaters

Q29. Do you have any comments about or suggestions for Energy Trust's guidelines for industrial studies?

Industrial	Longer the hours, better the incentives!
Industrial	No

Q34. What was the MAIN HVAC equipment you installed in 2010?

Industrial	Heating

Q39. Do you have any suggestions to improve the tool?

Industrial	Compatibility with different Excel versions can be a problem but we work around it.

Q49. Do you have any suggestions to improve the tool?

Industrial	Make the font bigger. Make sure that we can cut and paste in all fields without screwing up the Excel worksheet. Also make sure that we can delete fields without screwing up the spreadsheet. This isn't rocket science. Hire someone that can build a robust worksheet!!! You have the $$$.

Q55. A number of Solarize initiatives are underway. What can Energy Trust do to help you or your firm work with them?

Solar PV	Don't award whole quadrants of the city to one contractor
Solar PV	don't know
Solar PV	I am retiring as a contractor. I am willing to work as a volunteer to bring a Solarize project to Roseburg.
Solar PV	I would like the opportunity to bid solar jobs. I would like Energy Trust to identify solar jobs (especially state work) so that Trade Allies could competitively bid the work. Secondly, without a solar incentive program, solar is dead in Oregon. Now that the BETC program is no longer available there are no commercial opportunities other than State work which in nominal. The simplest option and preferred by customers is to expand the FIT program or have Energy Trust manage a FIT program.
Solar PV	Keep us informed of initiatives on a regular basis
Solar PV	n/a
Solar PV	Spread the work among a number of bidders (contractors) on a single project.
Solar PV	Stop telling the customers their buying in bulk, with 30 to 40% in reduced price per watt. That's not true, but the ETO still will use that statement.
Solar PV	We are pushed out of Solarize opportunities by larger firms who can scale up more quickly.

Q63. In which renewable energy market do you primarily work?

Other renewables	Solar, Wind, and Micro-Hydro

Q67. What is the predominant HVAC equipment you install?

Commercial	I don't know

Q125. What are the reasons for not using commissioning?

Residential	Doesn't qualify for tax credits or incentives
Residential	no incentive for 7.7 heat pumps
Residential	only used on tax credit jobs
Residential	owner doesn't get commission
Residential	waiting to take heat pump commissioning class
Residential	we do use it

Q130. Which parts of the house do you typically check for air leaks?

Residential	all- over
Residential	New Housing Tests

Q134. Which parts of the house do you typically check for air leaks?

Residential	all per program guidelines
Residential	Electrical penetrations, abandoned devices

Q150. What is the main reason for the deterioration of your working relationship with Energy Trust?

Solar PV	ETO using the solarized program to bring down the standard of American workers pay.
Other renewables	Energy Trust only supports and advocates for 3 solar companies in Portland.

Q151. What is the main reason for the improvement in your working relationship with Energy Trust?

Solar PV	ENERGY TRUST ONLINE SITE BECAME EASIER TO NAVIGATE, THANK YOU
Other renewables	The new staff have taken a proactive approach to improve the Small Wind Program.

Q155. What is the main reason for the deterioration of your working relationship with Energy Trust?

Residential	90% furnace rebates ended, don't do that many heat pumps. Working on that and now trying mini splits to get more involved
Residential	Elimination of gas furnace incentives.
Residential	I was not allowed to continue to use the allied promotion section of the Energy Trust Web Site
Residential	I was very disappointed to the slow response to concerns about the Star Rating system this year. From day one, ETO & CSG staff acknowledged it's weaknesses and potential harm to business, but it too was a full year before reparative action was taken. ETO tries to stay in tune with what contractor's needs are, but sometimes you take the easy road to gain feedback. You understandably try to streamline the sources that you use to gain feedback on how your policies are working for business owners, but sometimes this can provide you with incomplete information. The Home Performance Guild is a great organization, but they represent established companies more than emerging businesses and sometimes advocate for policies that will solidify the business position of the Guild board members. Please be aware that emerging HP contractors often cannot afford membership, and therefore are not always represented in their perspective. Also. Round Table meetings seem to be dominated by a few loud voices that again may or may not represent the views of all business owners & managers. Surveys, such as this, are a good idea. Particularly when questions are presented in a more open-ended manner that allow for qualitative (and more accurate) expression of people's experiences and perspectives.
Residential	Leave messages for staff members and no calls returned back.

Residential	Many have no true field experience. QC refers to the spec manual as law with no exception, when in fact it should be looked as a guide. Need to listen more closely to the experienced contractors.
Residential	Rating system misleading

Q156. What is the main reason for the improvement in your working relationship with Energy Trust?

Residential	A good ongoing relationship, thanks.
Residential	I'm making more use of what's available with co op and getting more involved
Industrial	Fantastic People to work with!!!!!
Industrial	The 25% savings requirement needs to be more flexible.
Other/Unclassified	After pestering .....ETO staff is giving me more attention and help...THX :)
Other/Unclassified	Just getting started and they have been great in all avenues - Dan Wilkinson is great to work with. Also - requirements became a bit easier

Q157. Please rank your top 3 program areas you'd like to receive training in, in order of interest. Check a "1" for the program you are most interested in, and so forth. Program areas you are not interested in can be left blank.

Residential	Advanced techniques and practical solutions for weatherization addressing REAL WORLD (not perfect case) scenarios.
Residential	Can't wait for EM Home!
Residential	I'd be interested in trainings that educate residential contractors on ways to expand their practices/business into commercial and multi-family arenas. i.e. Multifamily Retrofits for Residential HP contractors. Air sealing trainings are always good. Bidding and material selection could also be helpful.
Residential	none
Other renewables	Training should be thru OSEIA and Energy Trust could spend its' funds on customer rebates.
Other/Unclassified	Anything regarding energy management in commercial buildings
Other/Unclassified	building envelope field training
Other/Unclassified	My biggest thing that I look for from the Energy Trust is getting clear communications returned in quick manner. This includes assistance with pre and post incentive discussions, forms, etc.

Q158. As a trade professional, what types of support from Energy Trust would be valuable to you? Please indicate your interest in the following areas where "1" indicates not at all interested and "5" indicates very interested.

Residential	It is the HVAC companies' job to know HVAC and it is your job to have energy programs not teach us how to do HVAC. A while ago your website suggested having a

	system serviced once every 5 years, although the manufacturer requires an annual service in order to have an active warranty. You are energy efficiency and programs, teach us about your programs and their requirements don't cross the line into our field of expertise.
Residential	Sorry . . . I don't know what some of the above even are . . . such as PTCS program and BPI certification
Residential	Start helping pay for all the trainings.
Residential	would like webinar meeting and trainings
Other renewables	Leave the training to OSEIA and use more money for customer incentives.

Q161. To what degree does your location prevent you from attending Energy Trust trainings?

Residential	Events held at ETO offices demonstrates poor understanding of your customers. It is difficult, if not impossible, to leave a job early in order to navigate traffic and then find ""safe"" parking to protect our work vehicles and content. Downtown is not convenient for anyone except ETO.
Residential	We only attend what is required for you our company to participate in your programs, our last training was done online.
Solar PV	The class was a webinar and worked well.....
Other/Unclassified	Tough to get a format that works for all.. the last one in Bend was pretty good

Q166. Following are several possible topics for routable meetings. Please rank them in order of your preference.

Residential	Ask folks to provide general feedback in writing as much as possible.
Residential	Direct payment of incentives to Trade Allies regardless of participating in Savings Within Reach
Residential	limit amount of repetitive complaining from a couple of people
Solar PV	Do this as a webinar- internet meeting

Q169. When receiving information about Energy Trust programs, what types of communication do you prefer?

Residential	An email notice would be fine, direct a link to details on website.
Residential	As you do, keep trying to make your website as plain and clear as possible. It's sometimes a bit difficult to find specific info related to special programs, packages, etc.
Residential	I personally haven't been to anything, but the owner of our company has! These are what I think would work for us.
Industrial	I have not attended meetings but have met with engineers and that is very helpful.
Solar PV	Internet meeting/webinar
Other renewables	The ETO Website is no longer user friendly. The old version was easier to navigate and find information and forms about the available programs.

Q170. How frequently do you wish to be contacted concerning Energy Trust news and program updates?

Residential	As it occurs.
Residential	as needed
Residential	as often as needed
Residential	When there is something significant about your programs
Residential	When they happen.
Residential	When they have something important and germane to my business.
Industrial	Depends on the importance of the contact. If pertinent information then as frequently as needed. I don't like newsletters that have no substance.
Solar PV	As needed with changes
Other renewables	As needed.
Other renewables	Bi-Annually

Q180. Which of the following types of articles would be most useful in future newsletters?

Residential	I like seeing info about programs other than the one that I usually work with. It helps expand my awareness of what is happening re EE in a variety of areas.
Residential	I need to find time to read all the info that is sent by email HBA, BPI, PTCS, EEBA, builder..... info over load.....
Residential	I would like to see the articles written FOR INSIDERS. There are too many fluff articles, feel good features and back-patting of Energy Trust. ETO provides support but we do the actual work. Let's discuss in-field challenges and creative solutions.

Q183. What pages do you typically visit on the Energy Trust Website?

Residential	Solar and Financing
Residential	Trade Allies forms and program information

Q186. What are the top things you are looking for when you go to the Energy Trust Website? (Please indicate if they are difficult to find)

Residential	Co-op marketing is not easy to find
Residential	it seems like not all the incentive forms are always available on the ETO website for trade ally resources
Residential	On online portal for submitting incentive information would be very helpful
Residential	Package program requirements and forms/coupons are sometimes hard to find.
Other renewables	Small Wind does not have a main link

Q189. How effective are the following channels for creating leads. (1 is not at all effective and 5 is very effective)

Residential	Customers never see the star rating, otherwise it would work!
Residential	I am answering these questions as they pertain to me. Some things I would mark differently in relation to our sales staff etc. Example: The sales staff may really like the download to a smart phone, where I prefer the internet at my desk.
Residential	I do not agree with the star rating procedure. I have over 30 years in the business. All my service techs are well trained. For example a company could take some classes and have a higher star rating than me who in my opinion is more qualified.
Residential	I do not know of any of these channels that work well for me. I used to do a lot of business off of the Allied special promotions page but then that slowed way down and now I am not allowed on it.
Residential	I don't know how effective they are. We receive very few leads, maybe because we specialize in windows, and there are many window contractors.
Residential	I feel that the trade ally ratings are still too vague and too easy for contractors to qualify for the three star rating. I think since the program has matured the number of jobs it takes to qualify for third tier should be increase, also I think it would be helpful to note on each trade ally's page or ratings how long they have been a trade ally and maybe how long they have been a trade ally in good standing at 3 tiers. Showing companies who have been committed to the ETO program for a long period of time demonstrates our competence and general ability to be very helpful to our customers.
Residential	I personally believe the star rating limits the entry of small scale contractors to the whole program. I'm grateful we got involved when we did. It is not a reflection of how good the contractor is, only on how many jobs they do. Some of those larger firms crank out the audits, but they aren't spending the time to educate the homeowner or treat the whole house as a system, it's more about cranking out the HP Audits.
Residential	Most of my business still comes from existing clients and referrals.
Residential	Only started here at the end of December . . . we're still sorting this out and I'm looking forward to exploring more.
Residential	Star ratings are very helpful, only if one has a three star rating. I'm happy that you changed the criteria and descriptive language. I still think that stars are viewed by the customer as denoting quality only.
Residential	Very rarely see ETO advertising in our market. Douglas County, OR
Residential	We have not had any leads that we know of from the Energy Trust of Oregon.
Residential	We have not received a single lead from the ETO.
Residential	Word of mouth, Referrals
Commercial	I don't believe we receive many ""leads"" directly from Energy Trust - but perhaps don't really know unless the customer volunteers the information. Most of our work is for customers that we actively pursue ourselves... but we would definitely like to receive more leads from ETO.
Solar PV	Help with Solarize program in Roseburg

Solar PV	Is it possible to randomly sort, or continuously rotate through, the company names instead of having them alphabetical? Synchro Solar comes up last on every list.
Other renewables	See, the thing is, most of the ETO's advertising effort has been behind the Solarize program (directly or indirectly). Until that changes or until more advertising effort is put into promoting the entire industry, three companies will thrive and 40 will starve. DON'T DO A STAR RATING! The Solarize contractors already have enough of an advantage. We have stopped co-op advertising because the there is too much strong armed oversight by the Energy Trust.
Other renewables	Small Wind should be promoted more on the website. It seems Solar gets much more attention.
Other/Unclassified	I generate all my own leads and feel that the ETO should be there to support my efforts not conflict the customer or the channel
Other/Unclassified	Please review co-op for newbies

Q194. How could the star rating system be improved?

Residential	Allow only the 3 star contractors to be allies.
Residential	Any rating should be based on quality, reliability and trustworthiness, NOT on volume. The current system unjustly favors larger organizations. Again, ETO is more interested in generating its own numbers than providing clients with sensible solutions.
Residential	Base it off all jobs
Residential	can't keep everyone happy some that do very little work think they should be on top maybe a scale that shows high to low amount of jobs done and a scale of QC average by number done
Residential	Do not use the call center to distribute 3 star contractors, it limits new Trade Allies ability to get in the game. Do not base it on the number of jobs completed, but on the quality of work, or average it. There is no way for a mom & pop construction company to compete with a company that has a crew. It does not support small business.
Residential	Drop it. You are either approved or not approved. Your present system is unfair since it does not give the new guy or small guy a chance.
Residential	eliminate
Residential	eliminate it
Residential	Eliminate it.
Residential	Eliminate it.
Residential	Explain how to keep star rating up
Residential	I don't know enough about it to comment yet.
Residential	I don't use it from a customer standpoint so not sure how to improve it.
Residential	I think it would be good for them to have to put in the zip code and bring up contractors in that area.

Residential	I think the number of jobs should be increased now for each tier since the Energy Trust program has matured over the years. Also there should be a tier rating for Home Performance BPI Certified contractors in addition to regular Trade Allies.
Residential	It creates a bias to the consumer. It does not educate the consumer. It displays quantity.
Residential	It's somewhat difficult for us to search out information on our company when we know what we are looking for. I have to believe that it is still more difficult to customers to find the same information.
Residential	Make it easier for customers to see it.
Residential	Make it Specific to Home Performance. Expand the criteria and number of stars used to 5 stars.
Residential	make sure to collect more info from customers when they visit list and pas their info onto contractors directly
Residential	Make it follow proven experience and high quality of work. QC's records should reflect the rating.
Residential	Maybe by using a ""new trade ally"" designation for a fixed period of time for new contractors, rather than penalizing them for being new
Residential	Maybe eliminate it. I can see that it's trying to help consumers, but once a few businesses become established doing Energy trust projects, smaller businesses will be less able to compete and may be deterred from signing up. I think the Energy Star listings are much better.
Residential	More incentives for HVAC
Residential	NA
Residential	New descriptive language is much better. Maybe using something other than stars. Leaves for example, seem to represent a commitment to the environment as opposed to stars which often seem to indicate quality only. Perhaps, an energy star logo could be placed next to the HP contractors and others who have produced high energy savings.
Residential	Provide customer comments in short layout - like Angieslist
Residential	Put years of service as a qualifying conditions. Companies like Gil's who have ""no"" long term proven record should not have a high star rating as a business that is has years of experience with the ETO and no QC issues.
Residential	Rate contractors on quality and not quantity of jobs
Residential	Separate quality from numbers
Residential	some customers can't navigate to the particular page
Solar PV	I don’t see the rating when I looked our company up? Not sure on this portion of the survey.
Other renewables	eliminate
Other renewables	Factor in territorial limitations, such as Avista and City of Ashland electric.

Other/Unclassified	look at un-satisfied customers with un-resolved problems

Q196. Do you have any additional comments or suggestions for Energy Trust?

Residential	Accept ""claims made"" liability insurance for trade allies. I would like to build multifamily to energy trust standards but am not allowed to under my occurrence form of insurance. Almost all occurrence form policies exclude multifamily construction. This is a PROBLEM
Residential	At the round tables, please limit repeat negative comments to 1-2 min or find a different a break out group for them to vent. Most of us make time in our busy schedules to come and learn and do not want hear 30 minutes of complaining from 3-4 people. Several of us have almost left the meet due to the few problem people and may stop coming if this continues. Thank you for all your hard work!
Residential	Before investing ETO time & resources in a pilot program concept or design, conduct a survey and share your ideas with all of your Trade Ally's in a given trade. The feedback obtained from individuals who do this for a living will garner wider participation and a stronger final product.
Residential	Does the Energy Trust offer rental blower door or duct blaster equipment for Trade Ally's?
Residential	Don't waste money and please do not get involved in pricing jobs.
Residential	Drop the ""of Oregon"" from the name or rename a program specific for Washington.
Residential	Drop the star rating so everyone is equal.
Residential	Energy Trust has been super for our business! Please keep incentivizing the consumers to upgrade their homes. Spend less money on advertising that promotes expiring incentives, less printing and less paperwork. A lot of the programs have a ONE page incentive and much simpler. Too much printing with ""small print"" serves as the program not being ""CLEAR"", promote transparency by making this less confusing.
Residential	geothermal incentives
Residential	I have worked with you for over 6 years with two different construction contractors. I find that it is harder to work with you today and get quality help and information than it was 6 years ago. Regular changes in personnel there don't help matters either.
Residential	I think overall the ETO staff are exceptional as well as the programs you manage. I still feel like there is some misconceptions in the market place about what an HER is and why a customer should follow additional steps to have a Home Performance assessment done with the proper diagnosing equipment. We get all the time that customers already had an energy audit done by energy trust and why do they need to pay for another audit to determine how much insulation or air sealing they need. It makes it that much harder to sell an audit on the front end with this misconception already in their heads. Overall the changes that have happened this year within the program have been very great and everyone within CSG and ETO have been a pleasure to work with! Keep up the great work.. I do think as a whole our industry needs to start thinking of life after rebates and tax credits and how our industry can continue to grow and sustain itself if and when these rebates are reduced and tax credits expire.
Residential	I tried to fill out the paperwork to put solar panels on my own roof and I couldn’t get

	any one to help, I even came to your office
Residential	If you are looking to offer HVAC training it should be in hosting classes that are trade specific such as NATE training and testing, PTCS training and certification, CHECK ME training and continue ed classes required by the CCB, or yes a seminar that explains your specific program and your specific requirements being attended by an upper management or owner. The last training completed by our company with the Energy Trust was the webinar for the heat pump advanced controls pilot. This was a waste of our technicians time, as it should have been for every technician attending because if they didn't already know this information than they are not qualified to be technicians. Being a part of these programs is costly to the qualified contractor, attending seminars are timely and costly as well. Make them worth our time, don't teach us code, we know code. Don't teach us how to install or design HVAC equipment, we know how to do this as well. Set your programs, design your paperwork and educate us on those.
Residential	it may not be perfect (nothing is...) but hats off to the et staff for all the work to make the best use of resources and the constant evaluation and the changes made to keep it moving forward and getting better.
Residential	Keep on doing the best you can, and do not fall prey to special interests.
Residential	Keep up the great work, we value our relationship with you and so do our customers.
Residential	Looking forward to the next round table. thank you
Residential	make it simple
Residential	More incentives for HVAC instead of the majority of the incentives going for solar and other
Residential	more Medford, OR training
Residential	My three most important comments: 1.) An online portal for submitting incentive paperwork would be very helpful 2.) Paying Energy Trust incentives directly to the Trade Ally (regardless of income restrictions such as programs like Savings Within Reach) would absolutely drive greater demand in energy efficiency. I believe this could be accomplished by requiring that Trade Allies are very clear to customers the process and that Energy Trust is offsetting a portion of the total cost. 3.) For those not currently participating in Clean Energy Works Oregon, I believe that Energy Trust is placing so much emphasis (marketing) in the program that the Trade Allies that are not big enough to be in the program are losing significant business being that 100s of homeowners are going the Clean Energy Works route in lieu of the standard incentive route (especially with the instant rebate of $3700). Even though I believe in the theory of Clean Energy Works, I think it is hurting the small Trade Ally because it is taking away a lot of business from them if they are not part of that program. It is frustrating to see contractors spoon fed work from Energy Trust when good three star contractors are out there looking for work.
Residential	NO
Residential	Our experience with Energy Trust has improved over the last three years. Paperwork is easier to fill out and customer service has improved. Thanks.
Residential	Please meet the deadlines you set for your self
Residential	Thank you for allowing me to participate, I really look forward to learning more and becoming one of your top rated ally's. Keep up the good work!

Residential	Thanks for doing a great job to encourage energy efficiency and helping us contractors in the process. The only thing for me is as a no insulating company they rely training required with the manual. so little of that manual actually applies to me and I consider it a bit of a waste of time but am willing to do it if have to
Residential	Thanks.
Residential	The Energy Trust feels really disorganized. The difficulty of finding information on the website makes it less likely that I will take the time to research topics and think about using Energy Trust to secure contracts.
Residential	The last roundtable that was held in march was a lot of wasted time. I come for the info that I need to know/future changes. Most of what was covered could have been in the insider magazine. Little time left over for the breakout sessions which I think are the most important for whatever you are there for.
Residential	The PTCS program for energy trust customers should be administrated by the same entity that administers it for BPA customers. As is, the current system of having 2 different methods of completing requirements for PTCS systems is time-consuming and a real hassle.
Residential	The roundtable meetings seem to be a bitch session for contractors. It's time that contractors put their big boy pants on and work in harmony with ETO. I get tired of the same old people complaining, please try different methods of controlling the meetings, possibly tabling the complaints to a complaint breakout or ask them to set up a meeting to air their complaints outside the roundtable meetings.
Residential	Things seem to be improving overall with you folks, now if we could just get the economy to do the same
Residential	This survey was entirely too long
Residential	To make the ""CASH INCENTIVES"" clearly state that PTCS and Proctor ""Check Me"" are identical as far as the energy trust incentives are concerned
Residential	Tom Beverly is a wonderful asset to the trust.
Residential	We have enjoyed being a Trade Allie of the Energy Trust of Oregon. I don't know if it is the Clean Energy Works program, the rating system, a change in the Energy Trust, or the economy, but we use to get a call or two a week referral from the Energy Trust, and in the last four months we haven't had a single call.
Residential	While I've had a strong and respectful relationship with the ETO, recent changes are suggesting that the ETO is more concern with gaining trade allies and increase savings than in "best practice".
Commercial	All staff members for energy trust that have assisted me have been wonderful to work with
Commercial	Contact email addresses for each department.
Commercial	I think it is a valuable tool
Commercial	It is my understanding that residential is not eligible for Energy Trust incentives.
Commercial	no, very satisfied with ETO
Commercial	Recommend top five contractors based on experience - quality of workmanship - and

	Warranty provided to property owners by contractor.
Commercial	We are happy to be a part of the Energy Trust program and hope to do a lot more work with you.
Commercial	Webinar need to be other than 12:00 to 1:00. Almost impossible to see as that's part of the normal work day and no time to spend at computer.
Industrial	Again... The 103 needs a major overhaul.
Industrial	Get rid of the BETC and do a higher cash incentive. You have the lowest cash incentives on the West Coast. Not everyone has value for BETC and they are not easy to pass thru.
Industrial	Paul Warila of Cascade Energy has been extremely helpful. Not all of your contractors are as ""on the ball"" as Paul. I answered questions base on working with Paul. There is a large difference between your contractors and how smooth the process goes.
Solar PV	Hope residential sales come back. Interest died around here with the economy. Commercial kept me going the last few years. A Solarize Douglas County program could bring up sales. The new solar contractors/ electricians around here will need help getting sales as solar sales have been very labor intensive and time consuming.
Solar PV	Keep up the good work
Solar PV	Please find a way to expand to more rural co-op's etc.....
Solar PV	Please make the installation data for previous quarters or years available for our information. Information like kW installed, # of installs, average sizes, traditional incentives v FIT are useful to know when focusing on a market segment. Thanks for all you do!
Solar PV	We think that the inspection component of the Energy Trust is a value added feature to the upfront incentives offered and is important to the growth of solar.
Solar PV	Yes, I do. I do not believe that the Solarize program was fair, the City, and the ETO promoted a handful of contractors over the majority of contractors. I can't condone a race to the bottom as far as a decent living wage. That is not what we are seeing with Solarize Portland program. Shame on the ETO.
Other renewables	If you reduced your staff expense and spent that money for better incentives, it would be less time spent for those in the business and more systems placed in service.
Other renewables	Is it nit picking to demand wordage for advertising coop assist? If the ad does the work then the difference between a credit and incentive seems mute.
Other renewables	We enjoy working with the Energy Trust and look forward to more improvements to the Small Wind program.
Other/Unclassified	incentives for gas furnaces need to return
Other/Unclassified	Overall too many people from the ETO are calling on end-user customers which makes it very confusing to them and the Trade Allies.
Other/Unclassified	We will have more accurate and applicable answers at the end of 2011 after working with the Energy Trust for a year.