

2008

Energy Trust

Trade Ally Survey

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1. Executive Summary

This report summarizes the results of the 2008 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 fourth year, the survey is still focused on feedback but now includes a program/measure specific market research component. The rationale for collecting self-reported data from the trade allies about their specific markets is two-fold. First, any change in the proportion of various efficient technologies that are being installed by trade allies can be analyzed. Second, the Trade Ally survey can be compared to evaluations and program reports to corroborate the results.

The 2008¹ Trade Ally Survey was sent via email to 616 trade allies when it was launched on May 6, 2008. The survey was closed June 7, 2008 with 104 complete surveys yielding a response rate of 17%. Survey respondents accounted for 11% of total incentives paid in 2006. Additionally, respondents accounted for 16% of incentives affiliated with the 616 trade allies who were contacted for the survey.

1.1 Key Findings & Recommendations

General Trade Ally Findings

Of those responding, 73 reported themselves as mainly working in the Residential program, 15 in Commercial, 6 in Industrial, 9 in Solar PV and Solar Thermal, and 1 respondent categorized themselves as “other”. Since the respondent who selected “other” was not asked follow-up questions about specific programs and measures, they have been dropped from the analysis. There were no respondents who worked mainly with “wind, hydro, or other renewables”.

Table 2.1 Survey respondents by program

	Count
Residential	73
Commercial	15
Industrial	6
Solar	9

The four programs are analyzed separately.

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

Commercial

- Lighting (8)

Residential

- Gas Furnace (24)
- Heat Pump (10)
- Insulation (8)
- Windows (12)
- New Site-Built Homes (11)

¹ To clarify confusion with the nomenclature, the ‘2008 report’ covers the 2007 program year.

General Program Demographics & ODOE tax credits

Seventy percent of trade allies indicated that they have been working with the agency for more than two years. Almost one third (32 percent) received a majority of their revenue from projects involving Energy Trust incentives. The proportion of work done in Clark County, Washington was low, with 81percent of trade allies drawing less than a quarter of their revenue from that area.

Despite most trade allies working with Energy Trust for several years, a notable portion were not completely familiar with Oregon Department of Energy tax credits. Residential trade allies were the least familiar, with 42 percent only having heard of the tax credits or not knowing how to answer the question. This has been an issue in past trade ally surveys.

Recommendation

- Energy Trust should seek to provide trade allies with training on the tax credits and tools to help them promote the BETC and RETC to customers.

Marketing, networking, rewards, and training feedback

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

Marketing:

- Cooperative advertising support.....54%
- Ad calling attention to Energy Trust programs.....48%
- One-on-one marketing consulting provided by Energy Trust.. 37%
- Marketing workshops..... 39%
- Marketing to boost Energy Trust brand recognition..... 47%

Networking Opportunities:

- Networking within your specialty/trade.....37%
- Networking within your program (across trade)..... 39%
- Networking within your region..... 40%

Rewards:

- Scholarships to energy conferences.....40%
- Publicity through press releases.....51%
- Trade Ally of the month..... 32%
- Case studies of trade allies.....32%
- Award ceremonies.....20%

Training:

- General training on Energy Trust programs.....63%
- Technical training on energy efficiency.....42%
- Technical training on program measures and compliance..... 38%
- Small business management..... 15%

Recommendation

- Trade allies were primarily interested in more training on Energy Trust programs. Rather than a comprehensive training that might cover most of the programs and aspects trade allies are already familiar with, Energy Trust might consider having a Question and Answer session, or making such a session part of a trade ally roundtable.

Insider Newsletter

Trade allies generally find the newsletter helpful, with a large majority reporting it was ‘somewhat’ helpful. However, 45 percent of trade allies were not fully aware of the newsletter.

Recommendation

- In the future, more specific survey questions should be employed to elicit feedback about vendor expectations of the newsletter. Open-ended comments suggested more informative articles covering problems trade allies encounter and related solutions, as well as progress updates on Energy Trust program goals.

Energy Trust Website

Most respondents visit the trade ally webpages occasionally, usually to download forms and view incentives. When asked for suggestions for changes to the website, most respondents requested improved navigation to find information more easily. The majority of trade allies were interested in online forms.

Recommendation

- When making website improvements consider giving priority to improving navigation, putting forms on one page, and enabling online form submission.

Efficiency Program Satisfaction

High levels of satisfaction were reported across all categories from trade allies.

Percent expressing ‘Satisfied’ or ‘Very satisfied’ responses for:

- Overall satisfaction..... 78%
- Interactions with staff..... 73%
- Response times.....67%
- Requests for information.....74%
- Requests for help on forms..... 75%

Renewable Program Satisfaction

Renewable contractors indicated high levels of satisfaction across all categories, with the exception of paperwork approval and responsiveness to inquiries.

Percent expressing ‘Satisfied’ or ‘Very satisfied’ responses for:

- Overall satisfaction.....78%
- Turnaround time for paperwork approval.....66%
- Responsiveness of staff to inquiries 66%
- Quality of Energy Trust inspectors.....100%
- Quality of your relationship with inspectors..... 100%

Commercial Trade Ally Findings and Recommendations

Commercial respondents primarily installed lighting (8).

Commercial lighting technology installations (weighted by firm size)

Percent of fixtures installed:

- Premium T8 – 40%
- T5 – 39%
- T8 – 20%

Recommendation

- Apart from occupancy sensors, relatively few projects involved the installation of lighting controls. Energy Trust may want to promote lighting controls more aggressively.

Industrial Trade Ally findings

Only 6 industrial trade allies responded to the survey; they reported a variety of primary measures installed.

Recommendation

- Low response rate among industrial vendors has been a consistent feature of trade ally surveys since 2005. For subsequent surveys, Energy Trust should explore ways to improve the response rate among vendors in this program, as it represents a substantial portion of the agency's overall budget.

Residential Trade Ally Findings and Recommendations

The majority of residential respondents installed gas furnaces (24). This was followed by windows, heat pumps, insulation and site-built homes.

Gas furnace installations in existing homes

- 95% or more efficient – 43%
- 90-94% efficient – 37%
- 80-89% efficient – 20%

Heat pump installations

- HSPF 9.5 or more – 10%
- HSPF 9.0-9.4 – 28%
- HSPF 8.5-8.9 – 47%
- HSPF 8.2-8.4 – 9%
- HSPF code – 6%

Window installations

- 0.30 U value or less – 39%
- 0.31-0.32 U value – 34%
- 0.33-0.34 U value – 20%
- 0.35 U value – 7%

New homes

- ENERGY STAR – 91%
- Earth Advantage – 74%
- ENERGY STAR and Earth Advantage – 66%

Recommendation

- The markets for gas furnaces and heat pumps have been dramatically transformed, and Energy Trust should consider adjusting its incentives for these measures.

Solar Trade Ally Findings and Recommendations

Most responding solar trade allies installed both photovoltaic and water heating systems in 2007. Most of their revenue came from residential, rather than commercial, projects. All firms saw an increase in inquiries about solar electric systems compared to 2006, and were able to pursue almost all qualified leads.

Recommendation

- Among the programs, solar trade allies were the most interested in networking opportunities; Energy Trust should explore opportunities to introduce solar trade allies to other professionals in the field.

2. Introduction

2.1 Background

This report summarizes the results of the 2008 Energy Trust of Oregon Trade Ally Survey. Originally conceived as a feedback tool for the communication department about various offerings for trade allies it has since expanded. Now in its fourth year, the survey is still focused on feedback but now includes a program/measure specific market research component. The rationale for collecting self-reported data from the trade allies about their specific markets is two-fold. First, any change in the proportion of various efficient technologies that are being installed by trade allies can be analyzed. Second, the Trade Ally Survey can be compared to evaluations and program reports to corroborate the results.

The 2008 Trade Ally Survey was sent via email to 616 trade allies when it was launched on May 6, 2008. The survey was closed June 7, 2008 with 104 complete surveys yielding a response rate of 17%.

Respondent Representation

Survey respondents accounted for 11% of the total incentives paid in 2006. These respondents also accounted for 16% of the total incentives associated with the 616 trade allies invited to participate in the survey.

2.2 Evaluation Approach

Objectives

This survey was designed to accomplish the following objectives:

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

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

- **Participation** – Program areas trade allies were affiliated with in 2007 and primary measures installed.
- **Demographics** – Length of time as an Energy Trust trade ally, percent of revenue derived participation in Energy Trust programs, and size of firm.
- **Familiarity with BETC/RETC** – Awareness of the Oregon Department of Energy's Business and Residential Energy Tax Credits (BETC and RETC) and intensity of trade ally promotion to customers.
- **Market summaries** – Efficiency level of products installed.
- **Staff interaction feedback** – Satisfaction with inquiries made to program staff.
- **Marketing** – Types of marketing efforts in which trade allies are most interested.
- **Networking** – Types of networking activities in which trade allies are most interested.

- **Rewards** – Types of rewards in which trade allies are most interested.
- **Training** – Types of training that are most helpful to trade allies.
- **Insider Newsletter Feedback** – Usefulness of content and suggestions for improvement.
- **Energy Trust Website** – Easy of navigation and usefulness of information.

Methodology

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

On May 6, 2008 the 616 trade allies were sent an announcement via email requesting their participation. A link to the survey was embedded in the email announcement. A week after sending out this announcement all those that had not responded and entered their email address in the survey received a reminder email to participate in the survey. As an incentive to participate, respondents were entered into a random drawing for two \$100 gift certificates.

3. Findings

3.1 General Trade Ally Findings

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

- Trade ally firm demographics
- Familiarity with BETC and RETC programs
- Interest in various marketing and training initiatives, as well as rewards
- Feedback on communication tools, including Energy Trust’s website, Insider newsletter, and trade ally roundtables

Trade Ally Background

Of those responding 73 reported themselves as mainly working in the Residential program, 15 in Commercial, 6 in Industrial, 9 in Solar PV and Solar Thermal, and 1 respondent categorized themselves as “other”. Since the respondent who selected “other” was not asked follow-up questions about specific programs and measures, they have been dropped from the analysis. There were no respondents who worked mainly with “wind, hydro, or other renewables”.

- Median firm size in Oregon for trade allies is 7 and 10 nationally, including Oregon.
- 70% of trade allies reported that they have been an Energy Trust Trade ally for more than 2 years.
- 36% of trade allies received a majority of their revenues from jobs including Energy Trust incentives.

Table 3.1.1 Median firm size in Oregon (number of employees)

Residential	Commercial	Industrial	Solar
8	9	2	4

Commercial and residential trade ally firms had the highest median number of Oregon employees, while industrial and solar firms were less than half the size. Responding commercial and industrial firms were notably smaller than last year.

Table 3.1.2 Median firm size nationally (number of employees including Oregon)

Residential	Commercial	Industrial	Solar
9	14	3	4

Firm size nationally follows Oregon firm size with commercial and residential leading in median number of employees. Industrial and solar trade ally firms have virtually the same number of employees in Oregon and nationally, indicating they are generally local firms.

Table 3.1.3 Length of time as a trade ally

	Residential	Commercial	Industrial	Solar	Total
Count	72	15	6	9	102
Less than 6 months	0%	0%	0%	0%	0%
6-12 months	3%	0%	0%	0%	2%
1-2 years	32%	13%	0%	22%	27%
More than 2 years	63%	87%	100%	78%	70%
Don't know	3%	0%	0%	0%	2%

The trade allies who responded to the survey are primarily those who have been working with the agency for some time. This pattern is consistent with previous years' surveys.

Table 3.1.4 Percent of 2007 revenue from projects receiving Energy Trust incentives

	Residential	Commercial	Industrial	Solar	Total
Count	69	15	5	9	98
0%	0%	7%	0%	0%	1%
1%-24%	48%	60%	60%	22%	48%
25%-49%	15%	13%	20%	11%	14%
50%-74%	23%	0%	20%	33%	20%
75%-100%	15%	20%	0%	33%	16%

Of all trade allies, those participating in the solar programs report the highest percent of revenues from project involving Energy Trust incentives, as might be expected. Residential and solar trade allies reported more of their revenue as coming from Energy Trust related projects than in last year's survey, while industrial trade allies appear less reliant on projects receiving incentives.

Table 3.1.5 Percent of revenue from projects involving incentives by firm size

	Residential		Commercial		Industrial		Solar	
	Large	Small	Large	Small	Large	Small	Large	Small
0%	0%	0%	14%	0%	0%	0%	0%	0%
1%-24%	56%	41%	71%	50%	100%	50%	33%	17%
25%-49%	13%	16%	0%	25%	0%	25%	0%	17%
50%-74%	22%	24%	0%	0%	0%	25%	33%	33%
75%-100%	9%	19%	14%	25%	0%	0%	33%	33%

When firms are parsed by size, (larger or smaller than median firm size for a program) smaller firms generally derive a higher % of their revenue from projects involving Energy Trust incentives.

Table 3.1.6 Percent who did work in Clark County, Washington

	Residential	Commercial	Industrial	Solar	Total
Count	73	15	6	9	103
Yes	32%	53%	50%	22%	35%
No	63%	47%	33%	67%	59%
Don't know	6%	0%	17%	11%	6%

The majority of residential and solar trade allies did not perform any work in Clark County, Washington while about half of commercial and industrial trade allies did work in Clark County. Propensity to do work in Washington was directly related to trade ally firm location: all those located in the Portland-Vancouver Metro area reported doing business in Washington.

Table 3.1.7 Percent of revenue in 2007 from projects in Clark County

	Residential	Commercial	Industrial	Solar	Total
Count	23	8	3	2	36
1%-24%	78%	75%	100%	100%	81%
25%-49%	13%	25%	0%	0%	14%
50%-74%	4%	0%	0%	0%	3%
75%-100%	4%	0%	0%	0%	3%

Of those firms that performed work in Clark County, the majority derived less than a quarter of their revenues from those jobs; a few residential and commercial trade allies derived more than 25 percent of their revenue from projects in Washington. As Energy Trust begins to explore the possibility of expanding its service territory into Clark County for NW Natural customers, new relationships may need to be formed with local contractors.

Table 3.1.8 Anticipated change in projects involving Energy Trust in 2008

	Residential	Commercial	Industrial	Solar	Total
Count	72	15	6	9	102
Expect to increase proportion	58%	60%	50%	44%	57%
Don't project a change	38%	33%	17%	44%	36%
Expect to decrease proportion	4%	7%	33%	11%	7%

A majority of respondents indicated they expect their proportion of Energy Trust projects to increase or stay the same in 2008, and very few respondents expect to decrease the amount of projects involving Energy Trust. Responses follow a pattern very similar to last year.

No noticeable difference appeared between small and large firms when asked about their future participation with Energy Trust.

Table 3.1.9 Influence of Energy Trust incentives in moving projects forward in 2007

	Residential	Commercial	Industrial	Solar	Total
	71	15	6	9	101
Not at all influential	1%	7%	0%	0%	2%
Not very influential	20%	27%	17%	11%	20%
Influential	49%	7%	17%	22%	39%
Very influential	25%	53%	67%	67%	36%
Don't know	4%	7%	0%	0%	4%

Overall, 75 percent of respondents believed incentives were influential or very influential to projects in 2007. Solar trade allies reported greater influence of incentives on their projects than did other trade allies, likely due to the high upfront cost and longer payback time for solar projects and the relatively large size of Energy Trust incentives.

Table 3.1.10 Top three things that move customers to carry out projects (besides incentives)

	Residential	Commercial	Industrial	Solar	Total
	73	15	6	9	103
Energy savings	86%	93%	67%	78%	85%
The bottom line	47%	73%	83%	56%	53%
Environmental	38%	40%	17%	78%	41%
Comfort	41%	13%	33%	11%	34%

Almost all trade allies cited energy savings as a major source of customer motivation for completing energy efficient or renewable projects; the bottom line was also a common factor across program areas. Respondents were also allowed to write in another factor. Twenty one responses were collected; representative reasons were:

- Site appearance
- Mold or mildew problems in multifamily units
- Tax credits
- Public perception and marketing

Demographics Summary & Recommendations

Overall, trade allies responding to the survey have had a long working relationship with the Energy Trust and most plan to increase the proportion of work they do with the agency. The majority of their work is only carried out within Oregon.

Only 2% of trade allies reported that they have worked with the agency for less than one year. This could indicate two things:

- Those who have worked with the agency for a longer period of time feel they have more at stake and respond to the survey.
- The vendor driven model doesn't seem to be actively recruiting, with the majority of vendor relationships being long term.
- Energy Trust has recruited the majority of vendors in Oregon.

The latter case has important implications for any expansion into new service territories. As most trade allies indicated that they only do work in Oregon, new relationships will have to be established with vendors who are unfamiliar with the agency's policies.

Recommendations

Since the survey sample selected trade allies who participated in 2007 and the survey was sent out in June, it is logical that no one reported being a trade ally for less than 6 months. Coupled with the fact that Energy Trust has now been active for seven years, the question may need to be rewritten in future surveys with different categories: less than 1 year, 1-2 years, 3-4 years, and 5 or more years, for example.

Familiarity and Marketing of ODOE Tax Credits

The Oregon Department of Energy offers non-refundable 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 3.1.11 Familiarity with ODOE tax credits

	Residential	Commercial	Industrial	Solar	Total
Count	73	15	6	9	103
Familiar with BETC	4%	27%	67%	11%	12%
Familiar with RETC	15%	7%	0%	0%	12%
Familiar with BETC and RETC	38%	40%	17%	89%	42%
Heard of BETC or RETC	19%	27%	17%	0%	18%
Don't Know	23%	0%	0%	0%	17%

All respondents were asked about their knowledge of both the BETC and RETC. Of those who identified themselves as primarily working with residential programs, a majority were familiar with the RETC and many were also familiar with the BETC. However, 19% had only heard of the tax credits and another 23% were apparently unfamiliar with them. None of the commercial, industrial or solar trade allies were unfamiliar with both tax credits, but several of the commercial and industrial trade allies had only heard of the tax credits. Eight of the nine solar trade allies were familiar with both tax credits.

Compared to last year's survey results, trade allies appear much less familiar with the tax credits this year. While solar trade allies in both years were familiar with the tax credits, knowledge amongst residential, commercial, and industrial trade allies fell by 10, 9 and 17 percentage points, respectively.

Table 3.1.12 “When doing work that could qualify for the RETC, how often do you provide your customers information about the RETC?”

	Residential	Solar	Total
Count	38	8	46
Always	53%	88%	63%
Often	18%	12%	15%
Sometimes	21%	0%	15%
Never	5%	0%	4%
Don't know	3%	0%	4%

Respondents who reported they were familiar with the RETC were asked how often they provide customers with information about the tax credit. Solar trade allies almost always provide residential customers with information on the RETC. Among residential trade allies, 71 percent always or often give information; five percent report that they never give information on the RETC. Relative to the previous year's survey, residential trade allies were much less likely to provide information on tax credits – a surprising result in light of the softening economy.

Table 3.1.13 “When doing work that could qualify for the BETC, how often do you provide your customers information about the BETC?”

	Commercial	Industrial	Solar	Total
Count	10	5	9	24
Always	80%	100%	89%	88%
Often	20%	0%	11%	12%
Sometimes	0%	0%	0%	0%
Never	0%	0%	0%	0%
Don't know	0%	0%	0%	0%

As with the RETC, respondents who reported familiarity with the BETC were asked how often they provided information about it to customers. All responding trade allies provided this information either always or often, an increase for both commercial and industrial trade allies over last year.

Table 3.1.14 Awareness of increase in BETC for renewable projects

	Commercial	Industrial	Solar	Total
Count	10	5	9	24
Yes	60%	40%	100%	71%
No	30%	60%	0%	25%
Don't know	10%	0%	0%	4%

In the summer of 2007, the cap on the BETC increased to 50 percent of project costs for renewable energy projects. A majority of the trade allies who reported familiarity with the BETC also were aware of the increase in the tax credit. However, three of the five Industrial trade allies were unaware of the change, as were four of the 10 commercial trade allies.

Table 3.1.15 “Do your customers understand the difference between Energy Trust incentives and the tax credits?”

	Residential	Commercial	Industrial	Solar	Total
Count	42	11	5	9	67
Yes	69%	73%	100%	100%	76%
No	17%	18%	0%	0%	13%
Don't know	14%	9%	0%	0%	10%

More than 69% of respondents in each trade ally category believe their customers know the difference between Energy Trust incentives and state tax credits. Residential and commercial trade allies were less likely to believe their customers knew the difference than were industrial and solar trade allies. Responses to this question are in harmony with the responses in Table 3.1.11 on trade allies' own familiarity with the tax credits.

Table 3.1.16 Relative influence of the BETC and Energy Trust incentives

	Commercial	Industrial	Solar	Total
Count	10	5	9	24
Energy Trust incentive more influential	20%	40%	0%	17%
BETC more influential	0%	0%	0%	0%
Energy Trust and BETC together	60%	60%	100%	75%
Don't know	20%	0%	0%	8%

The majority of trade allies believe that the combination of Energy Trust dollars and the BETC are most influential in moving projects forward, although a few weighted Energy Trust incentives more heavily than the BETC.

Table 3.1.17 Relative influence of the RETC and Energy Trust incentives

	Residential	Solar	Total
Count	38	8	46
Energy Trust incentive more influential	18%	0%	15%
RETC more influential	11%	0%	9%
Energy Trust and RETC together	53%	100%	61%
Don't know	18%	0%	15%

Similar to responses about the BETC, most respondents felt that the combination of the RETC and Energy Trust incentives were most influential in moving projects forward. Eleven percent of residential trade ally respondents felt that the RETC was more important while 18% felt that Energy Trust incentives were more important.

Summary & Recommendations

The proportion of trade allies who reported familiarity with ODOE credits declined notably from last year's Trade Ally Survey, continuing a trend. In addition, residential trade allies who were familiar with the RETC were less likely than last year to promote it to customers. Among commercial and industrial trade allies,

there was a slight increase in the proportion who regularly provide information about the BETC, but several trade allies were unaware of the change in the tax credit for renewable products.

Energy Trust should make trade ally education on ODOE tax credits a renewed priority. Potential strategies could include articles in the Insider newsletter or special training and information sessions. Given the number of trade allies who reported that getting the most money back into the hands of the customer was a high priority, efforts in this area should be fruitful.

Marketing

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

Overall interest expressed for various marketing offerings:

- Cooperative advertising support.....54%
- Ad calling attention to Energy Trust programs.....48%
- One-on-one marketing consulting provided by Energy Trust.. 37%
- Marketing workshops..... 39%
- Marketing to boost Energy Trust brand recognition..... 47%

Table 3.1.18 Cooperative advertising support

	Residential	Commercial	Industrial	Solar	Total
Count	67	15	4	9	95
Not at all interested	10%	20%	0%	0%	11%
2	10%	20%	25%	11%	13%
3	16%	27%	50%	56%	23%
4	27%	20%	0%	0%	22%
Very interested	36%	13%	25%	33%	32%

54% of trade allies were interested or very interested in Cooperative Advertising Support (Energy Trust co-brands on your ads and pays a portion of the cost). Interest was highest among the Residential Trade allies (63%), lowest among the Industrial trade allies (25%). All trade ally groups experienced some decline in interest in cooperative advertising over last year.

Table 3.1.19 Cooperative advertising support, by firm size

	Residential		Commercial		Industrial		Solar	
	Large	Small	Large	Small	Large	Small	Large	Small
Not at all interested	10%	11%	14%	25%	0%	0%	0%	0%
2	0%	19%	29%	12%	0%	33%	0%	17%
3	20%	14%	43%	12%	100%	33%	33%	67%
4	27%	27%	0%	38%	0%	0%	0%	0%
Very interested	43%	30%	14%	12%	0%	33%	67%	17%

When subdivided by firm size, small commercial trade allies were more interested in co-op advertising than their large counterparts. While it appears that small industrial trade allies are also more interested in co-op marketing, only one large firm responded to the question. However, the pattern was reversed for residential and solar trade allies: large firms were more enthusiastic about cooperative advertising support. This finding is somewhat surprising considering that smaller firms usually have smaller advertising budgets and might be more likely to benefit from cooperative efforts.

Table 3.1.20 An Energy Trust ad in your local newspaper or radio calling attention to Energy Trust programs in which you participate

	Residential	Commercial	Industrial	Solar	Total
Count	66	15	5	9	95
Not at all interested	14%	27%	40%	0%	16%
2	9%	20%	20%	11%	12%
3	24%	27%	20%	22%	24%
4	26%	13%	0%	33%	23%
Very interested	27%	13%	20%	33%	25%

Slightly less than half (48%) of respondents expressed that they were interested or very interested in Energy Trust placing ads calling attention to Energy Trust programs. Residential and solar trade allies were most interested in this marketing initiative with 53% and 66% indicating interest, respectively.

There were no significant differences between large and small firms in interest in this option.

Table 3.1.21 One-on-one marketing consulting provided by Energy Trust

	Residential	Commercial	Industrial	Solar	Total
Count	67	14	5	9	95
Not at all interested	21%	14%	0%	44%	21%
2	16%	21%	20%	22%	18%
3	25%	43%	0%	0%	24%
4	24%	14%	60%	22%	24%
Very interested	13%	7%	20%	11%	13%

Overall interest in one-on-one marketing was slightly lower this year than last year, with only 37 percent of trade allies interested or very interested relative to 42 percent in the last survey. However, industrial firms expressed much more interest this year, as did solar trade allies.

There were no significant differences between large and small firms in interest in this option.

Table 3.1.22 Marketing workshops

	Residential	Commercial	Industrial	Solar	Total
Count	68	14	5	9	96
Not at all interested	24%	14%	20%	44%	24%
2	16%	29%	20%	22%	19%
3	19%	29%	0%	11%	19%
4	24%	21%	20%	11%	22%
Very interested	18%	7%	40%	11%	17%

The idea of general marketing workshops was notably more popular this year, with 39 percent expressing interest, although this option is still less popular than cooperative advertising and newspaper ads. As with last year, industrial trade allies were most interested and solar trade allies were least interested.

Table 3.1.23 Marketing to boost Energy Trust brand recognition

	Residential	Commercial	Industrial	Solar	Total
Count	68	15	5	9	97
Not at all interested	16%	13%	20%	22%	17%
2	18%	13%	40%	22%	19%
3	18%	33%	0%	11%	19%
4	28%	27%	20%	11%	26%
Very interested	21%	13%	20%	33%	21%

Slightly less than half of trade allies indicated interest in this initiative, with slightly higher interest indicated among residential and solar trade allies. Overall interest is the same as last year, with an increase in interest among industrial and solar trade allies compensating for a decrease among commercial trade allies.

Marketing Summary & Recommendations

Interest in marketing initiatives was strongest for cooperative advertising support and ads calling attention to Energy Trust programs, with marked interest among residential and solar trade allies. Industrial trade allies were notably more interested than others in marketing workshops and one-on-one marketing consulting, suggesting that it might be worthwhile to have different marketing offerings for each program area.

Networking Opportunities

Trade allies were asked to rate their interest on a variety of potential networking opportunities. Responses were on a 5 point scale with '1' meaning no interest and '5' meaning very interested.

Overall interest expressed for various networking opportunities:

- Networking within your specialty/trade.....37%
- Networking within your program (across trade)..... 39%
- Networking within your region..... 40%

Table 3.1.24 Networking opportunities within your specialty/trade

	Residential	Commercial	Industrial	Solar	Total
Count	64	14	5	9	92
Not at all interested	28%	7%	20%	22%	24%
2	11%	7%	0%	22%	11%
3	25%	43%	40%	22%	28%
4	23%	29%	0%	0%	21%
Very interested	13%	14%	40%	33%	16%

Overall interest was relatively low, with the most interest expressed by commercial (43 percent) and industrial (40 percent) trade allies.

Table 3.1.25 Networking opportunities within your program (across trades)

	Residential	Commercial	Industrial	Solar	Total
Count	65	14	5	9	93
Not at all interested	22%	7%	20%	22%	19%
2	14%	14%	0%	33%	15%
3	25%	50%	40%	0%	27%
4	25%	21%	20%	0%	22%
Very interested	15%	7%	20%	44%	17%

Interest level varied greatly by specialty, with commercial trade allies being least interested (28%) and solar trade allies being the most interested (44%). Overall interest was fairly low.

Table 3.1.26 Networking opportunities within your region (across programs & trades)

	Residential	Commercial	Industrial	Solar	Total
Count	64	14	5	9	92
Not at all interested	22%	14%	20%	22%	21%
2	11%	21%	0%	0%	11%
3	28%	29%	60%	22%	29%
4	22%	21%	0%	11%	20%
Very interested	17%	14%	20%	44%	20%

As with the other networking suggestions, interest was generally low, although more than half of solar trade allies were interested or very interested.

Networking Summary & Recommendations

Interest in networking opportunities remained at approximately the same level as in the previous year. Results suggest that different networking forums are appropriate for each specialty.

In future surveys, it may be prudent to ask trade allies to specify who they would like to network with, rather than offering general categories such as “within trade” or “within program”.

Rewards

Trade allies were asked to rate their interest in a variety of reward offers. Responses were on a 5 point scale with '1' meaning no interest and '5' meaning very interested.

Overall interest expressed for various reward offerings:

- Scholarships to energy conferences.....40%
- Publicity through press releases.....51%
- Trade Ally of the month.....32%
- Case studies of trade allies.....32%
- Award ceremonies.....20%

Table 3.1.27 Scholarships to energy conferences

	Residential	Commercial	Industrial	Solar	Total
Count	66	15	5	9	95
Not at all interested	23%	27%	40%	22%	24%
2	14%	13%	0%	0%	12%
3	24%	40%	0%	11%	24%
4	14%	13%	20%	11%	14%
Very interested	26%	7%	40%	56%	26%

Forty percent of trade allies expressed interest in scholarships that could be used for energy conference attendance. This is lower than interest in the 2007 survey (50 percent), but is in line with the 2006 survey (35 percent). Industrial and solar trade allies were most enthusiastic about this reward, with 60 percent and 67 percent interested or very interested, respectively.

Table 3.1.28 Publicity through press releases

	Residential	Commercial	Industrial	Solar	Total
Count	66	15	5	9	95
Not at all interested	12%	13%	20%	11%	13%
2	12%	27%	0%	11%	14%
3	27%	13%	20%	11%	23%
4	20%	27%	0%	11%	19%
Very interested	29%	20%	60%	56%	32%

Of the potential rewards for trade allies, a 51 percent would be interested in the opportunity to be publicized through press releases, with 32 percent of those being 'very interested'. Again, industrial and solar trade allies were most interested.

Table 3.1.29 Publicizing a Trade Ally of the month

	Residential	Commercial	Industrial	Solar	Total
Count	65	15	5	9	94
Not at all interested	20%	33%	0%	22%	21%
2	15%	13%	40%	11%	16%
3	35%	20%	40%	11%	31%
4	9%	20%	20%	22%	13%
Very interested	20%	13%	0%	33%	19%

Compared to 2007 when overall interest was 44 percent, interest in publicizing trade allies of the month has fallen among survey respondents. However, this year's interest level, 32 percent, is in line with the 2006 survey (29 percent). Solar trade allies were noticeably more interested relative to other specialties.

Table 3.1.30 Case studies of trade allies

	Residential	Commercial	Industrial	Solar	Total
Count	65	14	5	9	93
Not at all interested	28%	7%	0%	22%	23%
2	15%	14%	0%	11%	14%
3	32%	42%	40%	0%	31%
4	9%	21%	40%	11%	13%
Very interested	15%	14%	20%	56%	19%

While overall interest was only 32 percent, 60 percent of industrial and 67 percent of solar trade allies were interested in being the subject of a case study. Interest among residential and commercial trade allies was significantly lower this year than in the last survey.

Table 3.1.31 Award ceremonies

	Residential	Commercial	Industrial	Solar	Total
Count	64	15	5	9	93
Not at all interested	41%	67%	40%	55%	46%
2	20%	7%	40%	11%	18%
3	20%	13%	0%	0%	17%
4	8%	13%	20%	11%	10%
Very interested	11%	0%	0%	22%	10%

"Award ceremonies" was a new suggestion for this year's survey, but it received the lowest interest of all the reward possibilities. Few trade allies in any trade expressed enthusiasm for award ceremonies.

Rewards Summary & Recommendations

Of all reward options, the opportunity to be publicized through Energy Trust press releases received the highest level of interest (51%). This was followed by interest in scholarships (40%), publicity as a Trade Ally of the month (32%) and case studies (32%). There was very little interest in award ceremonies. Of the various trades, solar trade allies were the most interested in each of the reward options.

Training

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

Table 3.1.32 Attended a training session prior to 2007

	Residential	Commercial	Industrial	Solar	Total
Count	61	13	5	9	88
Yes	61%	92%	40%	89%	67%
No	39%	8%	60%	11%	33%

Except for industrial trade allies, more than half trade allies attended an Energy Trust training session prior to 2007.

Table 3.1.33 Usefulness of trainings prior to 2007

	Residential	Commercial	Industrial	Solar	Total
Count	37	12	2	8	59
Not at all useful	5%	0%	0%	0%	3%
2	19%	25%	0%	0%	17%
3	32%	25%	0%	13%	27%
4	22%	33%	50%	50%	29%
Very useful	22%	17%	50%	38%	24%

At least 50 percent of commercial, industrial and solar trade allies found the trainings they attended prior to 2007 useful or very useful. Residential trade ally opinions of the trainings were more mixed.

Table 3.1.34 Usefulness of trainings prior to 2007 by firm size

	Residential		Commercial		Solar	
	Large	Small	Large	Small	Large	Small
Not at all useful	6%	5%	0%	0%	0%	0%
2	24%	15%	20%	29%	0%	0%
3	35%	30%	40%	14%	33%	0%
4	12%	30%	20%	43%	33%	60%
Very useful	24%	20%	20%	14%	33%	40%

When subdivided by size, small firms found trainings more useful (rating of 4 or 5) than large firms.

Table 3.1.35 Attended a training session in 2007

	Residential	Commercial	Industrial	Solar	Total
Count	62	13	5	8	88
Yes	73%	92%	40%	75%	74%
No	27%	8%	60%	25%	26%

Compared to attendance at trainings before 2007, more residential trade allies attended a training session in 2007, while slightly fewer solar trade allies attended in 2007.

Table 3.1.36 Usefulness of trainings in 2007

	Residential	Commercial	Industrial	Solar	Total
Count	45	12	2	6	65
Not at all useful	7%	0%	0%	0%	5%
2	11%	17%	0%	0%	11%
3	31%	17%	0%	33%	28%
4	29%	42%	50%	67%	35%
Very useful	22%	25%	50%	0%	22%

Of those who attended training in 2007, the majority found them useful or very useful. Compared to trainings before 2007, residential and commercial trade allies found 2007 trainings somewhat more useful.

Table 3.1.37 Usefulness of trainings in 2007 by firm size

	Residential		Commercial		Solar	
	Large	Small	Large	Small	Large	Small
Not at all useful	9%	4%	0%	0%	0%	0%
2	9%	13%	20%	14%	0%	0%
3	32%	30%	20%	14%	33%	33%
4	27%	30%	40%	43%	67%	67%
Very useful	23%	22%	20%	29%	0%	0%

Commercial trade allies at small firms found 2007 trainings more useful than did their counterparts at large firms. There was virtually no difference by firm size in usefulness of trainings for residential and solar trade allies.

Suggestions to improve training sessions

Respondents were asked for suggestions to improve the value of the training sessions. Eighteen comments were received. Some representative suggestions included:

- Different levels of training
- Hold sessions in more locations
- More preparation and organization

Table 3.1.38 Subjects of interest for future training

	Residential	Commercial	Industrial	Solar	Total
Count	48	12	5	7	72
General training on Energy Trust programs	69%	42%	60%	57%	63%
Technical training on program measures and compliance	44%	25%	40%	57%	42%
Technical training on energy efficiency	31%	42%	60%	57%	38%
Small business management	21%	0%	0%	14%	15%

Trade allies were asked to pick a few training topics that would most interest them. Additionally, they were offered a chance to report specific forms of technical trainings that they would find most useful. Among the suggested topics, interest was highest for general program trainings, followed by technical training on program measures and compliance, and energy efficiency. General program training and technical training received high levels of interest in the 2006 and 2007 surveys as well. Preference for topics did not vary much by program. In terms of overall level of interest, commercial trade allies were least interested in the suggested training offers. There was very little interest expressed in small business training by any of the programs.

Twenty one respondents also offered suggestions for other technical trainings. Representative suggestions included:

- HVAC Systems calculations and software programs
- Paperwork completion in our field
- Building Energy and Air Quality Diagnostics

Table 3.1.39 Interest in other program training

	Residential	Commercial	Industrial	Solar	Total
Count	41	12	2	5	60
Duct sealing and insulation	39%	8%	0%	0%	28%
Commercial lighting	10%	42%	50%	40%	20%
Solar water heating	10%	33%	50%	40%	18%
Residential HVAC	17%	8%	0%	0%	13%
Residential new homes	17%	0%	0%	0%	12%
Residential windows	5%	0%	0%	20%	5%
Solar electric	2%	0%	0%	0%	2%
Commercial HVAC	0%	8%	0%	0%	2%
Insulation	0%	0%	0%	0%	0%

Most notably, industrial, and solar contractors all expressed high levels of interest in training on commercial lighting. Industrial and commercial trade allies were also interested in solar water heating training. Among Residential trade allies, 39 percent indicated that they would be interested in learning more about duct sealing and insulation, but few were interested in training in other programs.

Four respondents also offered their own suggestions or comments for on training. Useful suggestions were:

- interested in SBA course at COCC

- residential lighting and air quality

Training Summary & Recommendations

Trade allies who attended training in 2007 found them more useful than those who attended training in prior years. Across all programs there was a relatively high degree of interest expressed in ‘general training’ on Energy Trust programs.

With regard to cross program training, two particular programs elicited very high levels of interest: commercial lighting and duct sealing and insulation. Providing trainings on these two measure areas could potentially make good pilots for future cross-program training initiatives.

Trade Ally Meetings Roundtables

Trade allies who had attended a trade ally roundtable were asked to report how useful they found it on a 1-5 scale with 1 being ‘not at all useful’ and 5 indicating ‘very useful.’ Suggestions for improvements were also solicited.

Table 3.1.40 Attended a trade ally roundtables

	Residential	Commercial	Industrial	Solar	Total
Count	73	15	6	9	103
Yes	23%	47%	67%	56%	32%
No	71%	53%	17%	44%	63%
Don’t know	6%	0%	17%	0%	5%

Almost one third of survey respondents had attended a trade ally roundtable, with industrial, solar, and commercial trade allies much more likely to have attended than residential trade allies.

Table 3.1.41 Usefulness of trade ally roundtables

	Residential	Commercial	Industrial	Solar	Total
Count	14	6	4	5	29
Not at all useful	7%	0%	0%	20%	7%
2	29%	17%	0%	0%	17%
3	29%	50%	75%	20%	38%
4	21%	0%	25%	20%	17%
Very useful	14%	33%	0%	40%	21%

Roundtable attendees were asked about the usefulness of the events; opinions were neutral, with the most common rating being 3 out of 5. Solar trade allies were most positive about the roundtables, with 60 percent finding them useful or very useful.

Suggestions for meeting topics

All respondents were asked to suggest topics for the roundtable meetings and 26 suggestions were received from 14 trade allies. Representative suggestions included:

- More input and feedback from Trade Allies
- how to receive even more money for customers

- New survey tools - monitors, software, new ideas
- panels to discuss equipment and systems

Other suggestions regarding roundtable meetings

Respondents were asked for other suggestions regarding roundtable meetings. Twenty two suggestions and comments were given by 14 trade allies. Representative suggestions included:

- Locations outside the Portland area (Salem, Bend, Medford)
- Keep them short
- try to reach broader audience

Quarterly Trade Ally Meetings Summary & Recommendations

Participation in trade ally roundtables is low among survey respondents and most attendees did not find the sessions particularly useful. Given the number of suggestions for changes, the current roundtables are not meeting the trade allies’ needs.

Several respondents requested that the roundtables be more interactive, with question and answer sessions, and an opportunity to bring up concerns. A possible reason for low attendance may be location; Energy Trust should consider holding roundtables in more locations around Oregon. Energy Trust should consider refocusing the roundtables based on the survey results, and should also survey nonparticipants to assess reasons and remedies for low participation.

Insider Newsletter

Trade allies were asked a number of questions about the Insider Newsletter and its usefulness. They were also asked for suggestions to improve the newsletter.

Table 3.1.42 Awareness of the Insider newsletter

	Residential	Commercial	Industrial	Solar	Total
Count	73	15	6	9	103
Yes	53%	60%	33%	78%	55%
No	40%	27%	50%	11%	36%
Don’t know	7%	13%	17%	11%	9%

The majority of residential, commercial, and solar trade allies knew about the Insider newsletter; however, only two of the six responding industrial trade allies were aware of the newsletter. Overall, 55 percent of respondents knew about the newsletter; however, last year two thirds of trade allies *received* the Insider regularly, indicating this year’s respondents may have less communication with Energy Trust.

Table 3.1.43
Table 3.1.44 Usefulness of the Insider newsletter

	Residential	Commercial	Industrial	Solar	Total
Count	38	8	1	6	53
Very	11%	25%	0%	17%	13%
Somewhat	76%	75%	100%	67%	76%
Not at all	13%	0%	0%	17%	11%

Of those aware of the newsletter, a strong majority found it somewhat useful. Only a few residential and solar trade allies felt that the newsletter was not at all useful, but overall, the responses indicate that the newsletter could benefit from improvements.

Suggestions for changes to make the Insider more useful

Twelve trade allies offered a suggestion or comment about the newsletter. Responses did not lend themselves to categorization.

Insider Newsletter Summary & Recommendations

Those trade allies who know about the newsletter find it only somewhat informative, but offered just a few comments on how to improve it.

There are still many trade allies who are unaware of the newsletter. Energy Trust should make an effort to publicize the newsletter to all trade allies and continue to solicit suggestions for improvement.

Energy Trust Website

A series of questions regarding the Energy Trust’s website were asked to evaluate how frequently and how easy it is to access for trade allies.

Table 3.1.45 Frequency of visits to the Energy Trust website

	Residential	Commercial	Industrial	Solar	Total
Count	73	15	6	9	103
Never	27%	33%	33%	22%	28%
1-3 times a month	53%	53%	67%	22%	52%
1-2 times a week	10%	13%	0%	22%	11%
3-4 times a week	7%	0%	0%	11%	6%
5 or more times a week	3%	0%	0%	22%	4%

The majority (52 percent) of trade allies access the Energy Trust’s website 1-3 times a month. Commercial and industrial trade allies visit the website less frequently than residential and solar trade allies. Over one quarter of respondents never visit the website.

Table 3.1.46 Pages typically visited on the Energy Trust website

	Residential	Commercial	Industrial	Solar	Total
Count	48	9	3	7	67
Program forms	69%	44%	0%	86%	64%
Program incentives	63%	78%	33%	57%	63%
General program information	35%	67%	33%	14%	37%
Trade ally list	31%	11%	33%	0%	25%
Meetings calendar	21%	22%	33%	0%	19%

Trade allies most commonly viewed program forms (64 percent) and incentives (63 percent) on the website. This finding contrasts with last year, when only 13 and 27 percent typically looked for those pages, respectively; however, the 2006 survey found responses similar to this year. Trade allies this year were more likely to visit all website pages than in the 2007 survey.

Other pages frequently visited

Respondents were offered an open ended question to report frequently visited pages:

- Promotions
- Weather history (for EZsim)

Table 3.1.47 Helpfulness of trade ally web pages

	Residential	Commercial	Industrial	Solar	Total
Count	47	9	2	7	65
Not very helpful	2%	11%	0%	14%	5%
2	15%	11%	50%	0%	14%
3	34%	33%	0%	0%	29%
4	34%	22%	50%	57%	35%
Very helpful	15%	22%	0%	29%	17%

Opinions on helpfulness of trade ally webpages somewhat neutral, with responses clustered at 3 and 4 out of 5. As in last year's survey, solar trade allies found the trade ally webpages most helpful.

Suggestions to improve Trade Ally pages

Respondents were given an open-ended opportunity to suggest changes to improve the Trade Ally webpages. The most common suggestion was to bring the pages up to date with current contact and program information.

Navigation

Trade allies were asked to rate how easily they were able to navigate the Energy Trust website. Responses were on a 1 to 5 scale with 1 meaning 'very easy' and 5 meaning 'very hard'.

Table 3.1.48 Ease of website navigation

	Residential	Commercial	Industrial	Solar	Total
Count	47	9	3	7	66
Very Easy	9%	11%	0%	29%	11%
Easy	40%	33%	0%	29%	36%
So-So	45%	44%	100%	29%	46%
Hard	4%	0%	0%	0%	3%
Very Hard	2%	11%	0%	13%	5%

Approximately the same proportion (46 percent) of trade allies found website navigation 'so-so' for this year's survey as in the 2006 and 2007 reports. Only a few respondents found navigation hard or very hard. There was little difference in the pattern of ratings across program areas.

Suggestions for changes to Energy Trust websites

All trade allies were given an open-ended chance to suggest general website improvements. Thirteen trade allies contributed 23 suggestions or comments. Many suggestions were related to navigation; these included:

- Clear access to each programs incentives
- Make the weather easier to find
- One click from home page is enough
- Reduce the amount of information seen at a time
- Single spot for forms
- Total site navigation down left side of page

Table 3.1.49 Interest in completing and submitting incentive forms online

	Residential	Commercial	Industrial	Solar	Total
Count	71	14	5	9	99
Not very interested	3%	7%	0%	0%	3%
2	6%	0%	0%	0%	4%
3	13%	7%	0%	11%	11%
4	28%	29%	40%	0%	26%
Very interested	51%	57%	60%	89%	56%

All trade allies were asked about their interest in completing forms online. The majority of all trade allies were very interested, with solar trade allies being most interested. Only a few residential and commercial trade allies were not interested in online forms.

Website Summary & Recommendations

Most trade allies visit the Energy Trust website one to three times per month. Trade allies who visit the website are primarily searching for forms and information on incentives, and they find the trade ally webpages somewhat helpful. An overwhelming majority of trade allies are interested in online form completion and submission.

The large proportion of respondents who feel that ease of navigation on the website is 'so-so' indicates that there is potential to improve this facet during the current website redesign.

Program Satisfaction

Commercial, residential, and industrial trade allies were asked to rate their satisfaction with Energy Trust and Program Management Contractors on a number of dimensions. Answers were given on a 1 to 5 scale with 1 being 'very unsatisfied' and 5 meaning 'very satisfied'.

'Satisfied' or 'Very satisfied' responses expressed for:

- Overall satisfaction..... 78%
- Interactions with staff..... 73%
- Response times.....67%
- Requests for information.....74%
- Requests for help on forms..... 75%

Table 3.1.50 Overall satisfaction

	Residential	Commercial	Industrial	Total
Count	69	15	6	90
Very unsatisfied	4%	0%	0%	3%
2	1%	0%	17%	2%
3	19%	7%	17%	17%
4	38%	47%	17%	38%
Very satisfied	38%	47%	50%	40%

Overall satisfaction with the program was very high with 78% stating that they were 'satisfied' or 'very satisfied'.

Table 3.1.51 Interactions with staff

	Residential	Commercial	Industrial	Total
Count	69	15	6	90
Very unsatisfied	1%	0%	0%	1%
2	7%	0%	17%	7%
3	25%	7%	0%	20%
4	26%	33%	17%	27%
Very satisfied	41%	60%	67%	46%

As with overall satisfaction, trade allies indicated a high degree of satisfaction with their interactions with program staff. Industrial trade allies reported the highest level of satisfaction with 67percent indicating 'very satisfied'. The proportion of those who responded that interactions were unsatisfactory was negligible.

Table 3.1.52 Response times

	Residential	Commercial	Industrial	Total
Count	68	15	6	89
Very unsatisfied	7%	0%	0%	6%
2	3%	13%	17%	6%
3	22%	13%	33%	21%
4	29%	40%	17%	30%
Very satisfied	38%	33%	33%	37%

Trade allies expressing that they were 'satisfied' or 'very satisfied' drew the majority of responses. In the future, the question should specify to what the trade allies are requesting a response.

Table 3.1.53 Requests for information

	Residential	Commercial	Industrial	Total
Count	65	14	6	85
Very unsatisfied	3%	0%	0%	2%
2	6%	0%	17%	6%
3	18%	21%	0%	18%
4	34%	29%	50%	34%
Very satisfied	38%	50%	33%	40%

Satisfaction with requests for information received generally high marks, with nearly three quarters indicating they were satisfied. Half of commercial trade allies indicated that they were 'very satisfied' with the service they received when requesting information.

Table 3.1.54 Requests for assistance on forms

	Residential	Commercial	Industrial	Total
Count	59	13	5	77
Very unsatisfied	2%	0%	20%	3%
2	10%	8%	20%	10%
3	12%	15%	0%	12%
4	36%	31%	0%	32%
Very satisfied	41%	46%	60%	43%

High levels of satisfaction were reported by respondents, although two of the five industrial trade allies were unsatisfied with the response to requests for help with forms.

Table 3.1.55 Change in working relationship with Energy Trust since last year

	Residential	Commercial	Industrial	Total
Count	73	15	6	94
Improved a lot	8%	7%	0%	7%
Improved	29%	33%	33%	30%
Stayed the same	53%	53%	33%	52%
Gotten worse	4%	7%	17%	5%
Gotten a lot worse	3%	0%	17%	3%
Don't know	3%	0%	0%	2%

To more accurately measure a change in satisfaction, respondents were asked how their relationship with Energy Trust had changed over the last year. Over 80 percent of residential and commercial trade allies and two thirds of industrial trade allies said their relationship had improved or stayed the same. A small percentage of respondents in each program area reported that their relationship had gotten worse since last year.

Those who reported their relationship had improved or gotten worse were given an open-ended opportunity to explain what factors they believe led to the change. Responses could not be categorized.

Suggestions for improvement

All respondents were given the opportunity to provide four suggestions for ways Energy Trust could improve its service to them. A total of 68 responses were received from 43 trade allies. Responses could not be categorized.

Program Satisfaction Summary & Recommendations

High levels of satisfaction were reported across all categories from trade allies. Satisfaction increased slightly over last year for all aspects. Most trade allies reported that their relationship with Energy Trust has improved or stayed the same in the last year.

Response times received the least amount of satisfaction, although two thirds of respondents were satisfied. Energy Trust should investigate actual response times and make improvements if needed. If response times are in fact reasonable, staff should make clear to trade allies the customary response time to manage expectations. Some open-ended comments also note that trade allies are not always certain who to call when they need assistance, and contacting the wrong person may delay an adequate response. Energy Trust should use the website or the Insider newsletter to clarify appropriate program contacts.

Renewable Program Satisfaction

Given the different delivery models, trade allies who worked primarily in the renewable programs were asked to rate satisfaction with various aspects of the program separately from the commercial, residential, and industrial trade allies.

Satisfaction expressed for:

- Overall satisfaction.....78%
- Turnaround time for paperwork approval.....66%
- Responsiveness of staff to inquiries 66%
- Quality of Energy Trust inspectors.....100%
- Quality of your relationship with inspectors..... 100%

In all categories for renewable program training questions, small firms more frequently reported being 'satisfied' or 'very satisfied' than their larger counterparts.

Table 3.1.56 Overall satisfaction

	Solar
Count	9
Very unsatisfied	0%
2	0%
3	22%
4	56%
Very satisfied	22%

Solar trade allies appear content with their overall relationship with Energy Trust, with 78 percent reporting they are satisfied or very satisfied. Responses tend toward satisfied, rather than very satisfied.

Table 3.1.57 Turnaround time for incentive application/approval of paperwork

	Solar
Count	9
Very unsatisfied	11%
2	22%
3	0%
4	44%
Very satisfied	22%

Among all satisfaction questions asked of renewable trade allies, the lowest levels of satisfaction were reported for the turnaround time for incentive paperwork approval. While a majority of trade allies indicated satisfaction, one third were unsatisfied or very unsatisfied. This aspect also received the lowest satisfaction level in last year's survey.

Table 3.1.58 Responsiveness of staff to inquiries

	Solar
Count	9
Very unsatisfied	0%
2	11%
3	22%
4	33%
Very satisfied	33%

Solar contractors indicated that the program staff was generally very responsive to their inquiries. The pattern of responses was similar to last year.

Table 3.1.59 Quality of Energy Trust inspections

	Solar
Count	9
Very unsatisfied	0%
2	0%
3	0%
4	44%
Very satisfied	56%

High marks were given to the quality of Energy Trust inspectors who verify whether or not renewable installations meet program guidelines. Over half of trade allies indicated that they were 'very satisfied' with the quality of the inspectors.

Table 3.1.60 Quality of your relationship with Energy Trust inspectors

	Solar
Count	9
Very unsatisfied	0%
2	0%
3	0%
4	22%
Very satisfied	78%

All solar trade allies were satisfied with their relationship with Energy Trust inspectors with responses tending toward 'very satisfied'.

Table 3.1.61 How has your working relationship with Energy Trust changed since last year?

	Solar
Count	9
Improved a lot	0%
Improved	22%
Stayed the same	55%
Gotten worse	22%
Gotten a lot worse	0%

As with residential, commercial, and industrial trade allies, solar trade allies were asked to compare their relationship with Energy Trust this year to last year. Just more than half felt the relationship had not changes, while two of the nine believed it improved and another two felt it had deteriorated.

Solar trade allies who reported a change in their relationship were asked what factors contributed to that change. Responses could not be categorized.

Suggestions for solar programs

All solar trade allies were asked for suggestions or comments about the solar program. Twelve responses were received from six trade allies. Responses could not be categorized.

Renewable Program Satisfaction Summary & Recommendations

Renewable contractors indicated high levels of satisfaction across all categories with the exception of application/paperwork approval time. Although not indicative of highly 'unsatisfied' this deviation from otherwise high marks is noticeable and ought to warrant attention.

As with response time to inquiries for other trade allies, Energy Trust should evaluate its actual turnaround times for paperwork and, if necessary, make adjustments to the advertised time.

Renewable Marketing

Renewable trade allies were asked open-ended questions about their own and Energy Trust marketing efforts in 2007.

Most effective Energy Trust marketing efforts

Four trade allies offered an opinion about the most effective Energy Trust marketing effort, and each gave a different marketing tool:

- Co-op advertising
- Presents at trade shows
- Radio adds
- Website

Your own most effective marketing efforts

Seven of the nine solar trade allies shared their most effective marketing activity. Two mentioned a website, and one of those specifically mentioned Energy Trust's website. An interesting submission was the idea of demonstrating customer bills with and without a solar system. Although they are somewhat vague, two trade allies also mentioned involvement with community and policy groups

- Energy trust website/community involvement

- Newspaper story
- Presents at trade shows, active in policy groups
- Showing bills with and w/out
- Teaching, trainings, and high quality print ads
- Website
- Word-of-mouth

Most effective Energy Trust events

Only two solar trade allies listed an effective event and, surprisingly, one of those was the trade ally roundtables.

- NW Solar Expo
- Round table discussions

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

Solar trade allies did not appear to be interested in any other renewable technologies, with only one suggestion given – compressed air cars – and another trade ally discouraging pursuit of emerging technologies.

- Stay away from “emerging technologies, stick with what is available and known
- The compressed air car sure is amazing

Renewable Marketing Summary & Recommendations

With a very small sample of renewable trade allies responding to the survey and all of those being solar trade allies, not much can be learned about successful marketing strategies for renewable programs. Websites appear to be one avenue of successful marketing by solar trade allies, although respondents were not always clear as to which website they were referring.

One factor contributing to the limited information is the fact that Zoomerang text fields allow only 50 characters. In the future, longer and more complete responses should be allowed and encouraged if the questions are to provide informative suggestions.

3.2 Commercial Trade Ally Findings

Demographics

- 15 trade allies identified themselves as primarily working in Commercial programs.
- Median firm size in Oregon for commercial trade allies is 9.
- Nationally, the median size of these commercial trade allies is 14.
- 87% reported that they have been an Energy Trust trade ally for more than 2 years.
- 60% of Commercial trade allies derived *less than 25%* of their revenue through Energy Trust program participation.
- 60% expect the proportion of their projects involving Energy Trust to increase in 2008.

Compared to last year, when 33 commercial trade allies responded to the survey, participation in the survey was down by about 50 percent. This year, firms are slightly bigger and have been working with Energy Trust for slightly longer.

Table 3.2.1 Top 3 measures installed in 2007

Count	14
Lighting equipment and installation	64%
HVAC equipment and installation	36%
Boiler equipment and installation	29%
Engineering & design: lighting	21%
Building controls	14%
Building construction	14%
Engineering & design: mechanical	14%
Refrigeration equipment and installation	7%
Building O&M	7%

Respondents were asked to select the top three measures they installed in 2007. More than half installed lighting, while almost one third installed HVAC systems. Lighting was also the most commonly installed measure in the 2007 survey.

Trade allies were also allowed to write in a measure and one trade ally entered “Custom track that focuses on integrated savings”.

Table 3.2.2 Main measure installed in 2007

Count	15
Lighting equipment and installation	8
HVAC equipment and installation	2
Boiler equipment and installation	2
Refrigeration equipment and installation	1
Building construction	1
Architectural services: existing buildings	1

Trade allies were asked to narrow the list to the top measure they installed in 2007, and just over half selected lighting as their primary measure. Since lighting was the only measure to receive a decent sample size, results to follow-up questions about measure details are provided below.

Commercial lighting equipment and installation

Commercial lighting contractors were asked about the relative proportions of lighting technologies installed.

Table 3.2.3 Percent of 2007 lighting projects using the following fluorescent technologies (as a percent of installed fixtures)*

Count	8
Premium T8	40%
T5	39%
T8	20%
Other	1%

*Weighted by firm size.

About 80 percent of installations by responding commercial trade allies were divided equally between the Premium T8 and T5 categories. Relative to last year, installations of Premium T8 lights have increased by 10 percentage points, while the proportion of T5 lights has remained the same.

Table 3.2.4 Percent of 2007 lighting projects using the following lighting controls*

Count	6
Occupancy sensors	54%
Multi-level switching	14%
EMS	9%
Daylighting/dimming	6%
Sweep	1%

*Weighted by firm size.

Over half of lighting installations in 2007 were coupled with occupancy sensors. Installations of other lighting controls were minimal.

Commercial Trade Ally Summary & Recommendations

Commercial trade ally respondents to this year's survey primarily installed lighting equipment and most of their installations were in the T5 and premium T8 categories. They also installed occupancy sensors in about half of cases; however, no other lighting controls were frequently used.

3.3 Industrial Trade Ally Findings

Demographics

- 6 trade allies identified themselves as primarily working in Industrial programs.
- Median firm size in Oregon for industrial trade allies is 2.
- Nationally, the median size of these industrial trade allies is 3.
- All reported that they have been an Energy Trust trade ally for more than 2 years.
- 60% of industrial trade allies derived *less than* 25% of their revenue through Energy Trust program participation.
- 50% expect the proportion of their projects involving Energy Trust to increase in 2008; 33% expect the proportion to decrease.

Table 3.3.1 Top 3 measures installed in 2007

Count	6
Process controls and improvements	50%
Industrial lighting	33%
Compressed air systems	33%
Pump and fan systems	33%
Industrial motors	17%
HVAC	17%

Table 3.3.2 Main measure installed in 2007

Count	6
Pump and fan systems	2
Industrial lighting	1
HVAC	1
Compressed air systems	1
Other	1

Half of responding industrial trade allies report process controls and improvement as one of their top three measures, but none identified it as their primary measure. Two trade allies primarily installed pump and fan systems, with the remainder favoring industrial lighting, HVAC and compressed air. One trade ally selected “other” but was not asked to elaborate further.

Since no measures were selected as their primary measure by more than two trade allies, responses to measure-specific questions are not reported.

Table 3.3.3 Perform energy studies/evaluations for customers as part of sales

Count	6
Yes	83%
No	17%

Five out of the six responding industrial trade allies do routinely perform energy studies or evaluations for their customers.

3.4 Residential Trade Ally Findings

Demographics

- 73 trade allies identified themselves as primarily working in Residential programs.
- Median firm size in Oregon for residential trade allies is 8.
- Nationally, the median size of these residential trade allies is 9.
- 63% have been an Energy Trust trade ally for more than 2 years.
- 48% of residential trade allies derived *less than 25%* of their revenue through Energy Trust program participation.

- 58% expect the proportion of their projects involving Energy Trust to increase in 2008.

Table 3.4.1 Top 3 equipment/services installed in 2007

Count	68
Gas furnace	57%
Duct sealing and duct insulation	54%
Heat pump	46%
Windows	32%
Insulation	22%
Other	21%
New site-built home	19%
New manufactured home	1%

Slightly more than half of responding residential trade allies commonly install gas furnaces and duct sealing/insulation. Heatpumps, windows, and insulation were also mentioned by at least 20 percent of respondents.

Those who selected “other” as one of their top three measures were asked to specify. Responses were:

- air conditioning
- Check Me Commissioning
- Commercial Restaurant equipment
- Doors
- LifeBreath hydro to air units
- Older homes
- Tankless water heaters

Table 3.4.2 Primary measure installed in 2007

Count	68
Gas furnace	24
Windows	12
New site-built home	11
Heat pump	10
Insulation	9
Duct sealing and duct insulation	3
Other	3
New manufactured home	1

Gas furnaces were the most commonly reported primary measure among residential trade allies. Windows, new homes, and heat pumps also received several mentions and are reported on below.

Trade Ally Re-enrollment

In early 2008, Energy Trust required residential contractors to re-enroll as trade allies to ensure the list contained active trade allies and provide updated training on Energy Trust participation. Residential trade allies who participated in the re-enrollment were asked to evaluate the process and the helpfulness of the training.

Table 3.4.3 Participation in trade ally re-enrollment

Count	73
Yes	47%
No	23%
Don't know	30%

Just fewer than half of responding residential trade allies participated in the re-enrollment. Thirty percent did not know whether they had re-enrolled, a finding that indicates the survey may not have been received and completed by the appropriate contact at some trade ally firms.

Table 3.4.4 Renewal handled efficiently

Count	33
Yes	76%
No	18%
N/A	6%

Of those who re-enrolled, about three quarters felt their renewal was handled efficiently. Due to the ambiguity of the "N/A" option offered, it is not clear whether trade allies who selected this option had no opinion, were not involved in the re-enrollment, or had not re-enrolled, but mistakenly answered yes when asked if they participated in re-enrollment.

Table 3.4.5 Information updated correctly on website

Count	32
Yes	72%
No	18%
N/A	12%

A strong majority of trade allies reported that their information had been updated correctly on the Energy Trust Trade Ally webpage. Eighteen percent indicated their information was not correctly updated on the website.

Table 3.4.6 Helpfulness of the Home Energy Solutions re-enrollment training

Count	33
Not at all helpful	9%
2	9%
3	33%
4	24%
Very helpful	12%
N/A	12%

Most trade allies were neutral on the usefulness of the re-enrollment training, with few trade allies feeling it very helpful or not at all helpful.

Financing

In late 2008, Energy Trust will be partnering with a commercial bank to offer a special financing package for eligible Home Energy Solutions measures and residential solar installations. Residential trade allies were asked a series of questions about what type of financing they offer to customers and what features are important in a financing package they would promote.

Table 3.1.62 Currently offering financing options to customers

Count	73
No	49%
Yes	48%
Don't know	3%

Trade allies were split evenly on whether they currently offer financing to customers. Only two respondents (3 percent) were unaware of whether they offered financing.

Table 3.1.63 Organization financing offered through*

Count	32
Bank/financial institution	97%
Manufacturer	13%
Utility	13%
FHA/government	6%
Other	9%

*Multiple responses allowed

Almost all of the trade allies who offer financing do so through a commercial bank. Only a few trade allies offered financing options through government agencies, manufacturers, utilities, or other means. Respondents were allowed to write in an organization if it was not already on the list; three trade allies did so, naming:

- GE Money
- In-house payment extension
- Internal company financing

Table 3.1.64 Requirements on trade ally by financing organization*

Count	31
Fees	39%
None	35%
Company screening/references	29%
Certification	10%
Training	10%
Other	6%

*Multiple responses allowed.

Almost 40 percent of trade allies offering financing report that they have to pay fees to the financing organization and almost 30 percent must go through a screening of their firm or submit references. Very few are required to go through training or certification. Two trade allies noted additional requirements:

- Credit worthiness of the business
- Discount fees for each contract

Financing features most important to customers

Trade allies who offer financing were asked for up to four fees features of a financing package are most important to customers. Twenty four trade allies offered 49 comments. The following features were identified, with number of mentions in parentheses:

- Low interest rates (16)
- Same as cash programs (11)
- Low monthly payments (8)
- Ease of application/approval (5)
- No prepayment penalties (3)
- Extended repayment times (3)

Financing features trade allies like

Residential trade allies were asked to describe the features of financing that appeal to them. Twenty respondents provided a comment, and the following responses were received from multiple trade allies (number in parentheses):

- Immediate or fast payment (6)
- Ease of application, paperwork or approval (5)
- Increases business (3)

Financing features trade allies dislike

Trade allies were asked what features of financing they did not like; 19 trade allies gave a comment. The following comments were commonly identified:

- Paperwork (7)
- Fees (3)

Table 3.1.65 Barriers preventing trade allies from offering financing*

Count	26
Not familiar with	73%
Complicated administration	31%
Too much paperwork	27%
Does not provide enough value to customer	19%
Inability to consolidate loan, equipment purchase and installation into one transaction	12%
Interest rates too high	8%
Inability to qualify customer for a loan	4%
Not enough variety of financing products to offer customer	4%

*Multiple responses allowed.

Residential trade allies who do not offer financing to customers were asked for reasons that contributed to that decision. The vast majority reported that they were not familiar with financing options. Nearly one third believed that it would be too complicated for them administratively. Nine respondents also wrote in a reason; representative comments were:

- Customers don't ask
- They find their own commercial financing
- Not interested in offering financing

Residential Trade Ally Summary & Recommendations

As in last year's survey, gas furnaces were the top measure, followed by windows, new homes and heat pumps. Slightly less than half of residential trade allies participated in the re-enrollment process, with most of those feeling that re-enrollment was handled efficiently. Almost 50 percent of trade allies currently offer financing to customers through a commercial bank. They appreciate the fast payment and ease of application for the customer, but dislike the paperwork and fees. Among those not offering financing, lack of general knowledge about financing was the most common explanation.

Gas Furnaces

Table 3.4.7 Percent total gas furnace sales for existing homes by efficiency*

	Gas Furnace
Count	15
95% or more efficient	43%
90%-94% efficient	37%
80%-89% efficient	20%

*Weighted by firm size.

High efficiency installations made up the majority of installations by these vendors. Notably, more than 40 percent of the furnaces installed in 2007 were 95% or more efficient. Just one year ago, only 11 percent of installations were 95% or more efficient, and 48 percent were between 90% and 94% efficient.

Table 3.4.8 Percent of 2007 installations with an ECM

	Gas furnace
Count	22
0%	5%
1%-25%	18%
26%-50%	14%
51%-75%	27%
76%-100%	27%
Don't know	9%
Unfamiliar with ECMs	0%

More than half of gas furnace vendors installed an ECM on the majority of their jobs. This is a slight increase over last year.

Table 3.4.9 Cost differential (equipment and installation) between a code (80% efficient) furnace and a standard condensing furnace (90-94% efficient)

	Gas furnace
Count	20
Less than \$200	0%
\$201-\$300	0%
\$301-\$400	0%
\$401-\$500	5%
\$501-\$600	5%
Over \$600	75%
Don't know	15%

Three quarters of respondents reported that the cost differential between a code and a condensing furnace was over \$600, but it is not clear how much more than \$600. In the future the optional answers to this question need to be more expansive, such as \$201-\$500, \$501-750, \$751-\$1000, and over \$1000.

Table 3.4.10 Cost differential between a furnace with an ECM and one without

	Gas furnace
Count	20
Less than \$200	0%
\$200-\$500	10%
\$501-\$750	40%
\$751-\$1,000	25%
Over \$1,000	5%
Don't know	20%

The most common response to the cost differential for an ECM was \$501-\$751, with another 25 percent of responses in the \$751-\$1000 category.

Percent of 2007 furnace installations with an air cleaner

Gas furnace vendors were asked to report the percentage of their installations that included an air cleaner. When weighted by number of employees, 38 percent of 2007 installed furnaces came with an air cleaner.

Gas Furnace Summary & Recommendations

Gas furnace installers generally install 90% or more efficient furnaces with 43 percent of total furnaces being 95% or more efficient. More than half of trade allies installed an ECM on the majority of their jobs, and almost 40 percent of furnaces were coupled with an air cleaner.

In next year's survey, questions about cost differentials should use more expansive cost ranges to avoid the majority of responses falling in the "Over \$600" category.

Windows

Table 3.4.11 Percent of 2007 residential windows installations by efficiency*

	Windows
Count	8
0.26 U value or less	1%
0.30-0.26 U value	38%
0.31-0.32 U value	34%
0.33-0.34 U value	20%
0.35 U value	7%

*Weighted by firm size.

Thirty nine percent of installed windows in 2007 were rated at U value of 0.30 or less, the efficiency level that qualifies for Energy Trust incentives, more than a doubling over last year. In addition, only 7 percent of windows installed in 2007 fell into the least efficient category, compared to 33 percent of installations in 2006.

Table 3.4.12 Availability of 0.26—0.30 U value windows

	Windows
Count	11
Easily available	54%
Some models are available	46%
Difficult to get	0%
Not at all available	0%
Don't know	0%

Just more than half of windows contractors indicated that models in this efficiency category were 'easily available', with the remainder feeling that availability is still somewhat limited. In last year's survey, only 14 percent believed that 0.30 U value windows were easily available.

Table 3.4.13 Availability of 0.26 or less U value windows

	Windows
Count	10
Easily available	0%
Some models are available	0%
Difficult to get	40%
Not at all available	30%
Don't know	30%

Within the highest efficiency category of windows, most contractors reported that windows are either not available or difficult to find; no vendors indicated they were easy to obtain.

Windows Summary & Recommendations

Since last year's survey, window installations have shifted toward higher efficiency windows with nearly 40 percent eligible for Energy Trust incentives. Windows with a U value between 0.30 and 0.26 are easily available, while windows with a U value of 0.26 or less are still very difficult to find.

Heat Pump

Table 3.4.14 Percent of 2007 heat pump sales by efficiency*

	Heat Pump
Count	8
HSPF 9.5 or better	10%
HSPF 9.0-9.4	28%
HSPF 8.5-8.9	47%
HSPF 8.2-8.4	9%
HSPF code	6%

*Weighted by firm size.

Only 6 percent of heat pumps installed in 2007 were rated at an HSPF below 8.2, meaning 94 percent of heat pumps could have been eligible for Energy Trust incentives. Almost half had an HSPF of between 8.5 and 8.9. Average HSPF has increased since last year's survey.

Table 3.4.15 Cost differential between a code (7.8 HSPF) and an 8.5 HSPF heat pump

	Heat pump
Count	9
Less than \$100	0%
\$101-\$200	0%
\$201-\$300	0%
\$301-\$400	11%
\$401-\$500	11%
\$501-\$600	11%
Over \$600	33%
Don't know	33%

As with gas furnace cost differential questions, this question did not provide a wide enough range of answers to reliably estimate the cost differential for heat pumps. One third of respondents believed it was more than \$600 and another third could not estimate the difference.

Table 3.4.16 Percent of installations using commissioning

	Heat pump
Count	10
0%	20%
1%-24%	10%
25%-49%	10%
50%-74%	50%
75%-100%	0%
Don't know	10%

Trade allies varied in their use of commissioning, with 20 percent never using it, and 50 percent using it at least half the time.

Table 3.4.17 Reasons for not using commissioning*

Count	8
No customer demand	75%
Do not need commissioning, standard diagnostics adequate	38%
Takes too much time	25%
Too expensive	25%
Do not trust results	13%

*Multiple responses allowed.

Heat pump vendors gave a variety of reasons for not using commissioning, most commonly that the customer did not have any interest (75 percent). Time requirements, cost, and satisfaction with standard diagnostics were also cited by multiple respondents.

Heat Pump Summary & Recommendations

The vast majority of 2007 installed heat pumps were efficient enough to qualify for Energy Trust incentives, with higher proportions of heat pumps in the most efficient categories relative to the previous year. The cost differential between a code heat pump and an energy efficient one is more than \$600. About half of heat pump vendors use commissioning frequently; the primary reason for not using commissioning was lack of customer demand.

As with gas furnaces, answer options for questions about heat pump cost differentials should be expanded to prevent most respondents from selecting the highest dollar range.

New Site-Built Home

Twelve vendors indicated that they primarily did residential new construction. In total, these builders reported completing 187 homes in 2007. The median number of homes built by these firms in 2007 was 8; the maximum number for one builder was 70.

Table 3.4.18 Percent of homes certified:*

	New Site-Built Homes
ENERGY STAR (N=5)	91%
Earth Advantage (N=5)	74%
ENERGY STAR and Earth Advantage (N=6)	66%

*Weighted by number of homes built. If a builder did not give an estimate for a particular spec, they were excluded from the calculation; if they estimated zero percent, they were included.

Those who built to the ENERGY STAR spec did so on more than 90% of homes. This closely matches the estimate of 86 percent when respondents were asked in last year's survey what percentage of homes they planned to build in 2007 to meet ENERGY STAR guidelines. Among those who built homes to the Earth Advantage spec, 74 of the homes they built in 2007 met the spec, up from 50 percent in 2006. About two thirds met both specs. No builders reported building any homes to LEED spec.

Homes expected to be built in 2008

Eight builders provided an estimate of the number of homes they will build in 2008. The median estimate was 8 homes and the maximum for one builder was 50. Together, they plan to build 106 homes in 2008.

Issues with the new residential building code

As with insulation contractors, builders were asked if they foresaw any problems with the new residential building codes that went into effect in April 2008. Four respondents did not see any issues. Other comments were:

- No, though meeting the next Energy Star increase in standards will challenge our most affordable homes to remain as affordable as they are today.
- The learning curve and increased expenses with compliance

Table 3.4.19 "Given that the 2009 ENERGY STAR spec will be 15 percent higher than the updated Oregon codes, do you plan to build homes to that level?"

Count	8
Yes	75%
No	25%

Despite the change in the spec, most builders still plan to build ENERGY STAR homes. When asked what the challenges of meeting the spec would be, four named cost. Other responses were:

- Haven't analyzed it yet.
- The added cost in the depressed Bend market will challenge our affordability and costs to build.
- We are rebranding the company and marketing high performance homes as defined by the HPH credits issued by the Department of Energy
- Whether customers will see the value relative to the expense related to compliance

New Site-Built Homes Summary & Recommendations

The majority of new homes built by trade allies met ENERGY STAR, Earth Advantage, or both specs. This is a sharp increase over last year. Despite the increase in the ENERGY STAR spec in 2009, three quarters of builders plan to continue to build ENERGY STAR homes. Beside the increase in the cost of building, respondents did not see major issues with either the new ENERGY STAR spec or the updated Oregon building codes.

3.5 Solar PV and Solar Water Heating Findings

Demographics

- 9 trade allies responded that they primarily worked with Solar PV and Solar Thermal.
- Median firm size in Oregon for Solar PV and Solar Thermal trade allies was 4.
- Average of 2.25 FTE working on solar electric.
- 78% reported that they have been an Energy Trust trade ally for more than 2 years.
- 66% of residential trade allies derived *more than* 50% of their revenue through Energy Trust program participation.
- 44% expect the proportion of their projects involving Energy Trust to increase in 2008

Solar Electric

Table 3.5.1 Percent of 2007 revenues from solar electric

Count	9
0%	11%
1-24%	22%
25%-49%	22%
50%-74%	22%
75%-100%	11%
Don't know	11%

Responses to percent of revenue from solar photovoltaics (PV) cover the spectrum, with most firms receiving some, but not all their revenue from solar electric projects.

Table 3.5.2 Percent of 2007 solar electric revenue from commercial jobs

Count	8
0%	25%
1-24%	50%
25%-49%	13%
50%-74%	13%
75%-100%	0%
Don't know	0%

Three quarters of solar trade allies reported deriving less than 25 percent of their revenue from commercial solar electric projects.

Average kW of 2007 solar electric installations

Solar trade allies were asked to estimate the size (in kilowatts) of their average commercial and residential PV installations. The median was 6 kW for commercial installations and 3 kW for residential.

Table 3.5.3 Observed change in customer inquiries about solar electric from 2006 to 2007

Count	7
1%-24% increase	29%
25%-49% increase	29%
50%-74% increase	14%
75%-100% increase	29%
No change	0%
Decrease	0%

Inquiries into solar PV/water heating seem to have substantially increased for contractors in 2006. Well over half indicated that they saw greater than a 25% increase in inquiries. This could be said to tie into the observed increase in the amount project backlog.

Table 3.5.4 Percent of customer inquiries able to be pursued in 2007

Count	8
100%, and was able to serve all qualified leads	38%
100%, but selectively served only the highest qualified leads	50%
75%-99%	13%
50%-74%	0%
less than 49%	0%

Trade allies reported that they were able to respond to nearly all customer inquiries about solar PV and water heating in 2007. Compared to 2006, trade allies were better able to pursue qualified leads in 2007.

Table 3.5.5 Project backlog in solar electric

Count	8
Have no projects currently planned	25%
Have projects to cover work for next month	13%
Have projects to cover work for next 3 months	50%
Have projects to cover work for next 6 months	0%
Have projects to cover work beyond the next 6 months	13%
Don't know	0%

When asked about future projects in the pipeline, the most common response was enough projects to cover the next three months. Only one trade ally reported a larger backlog with enough projects to cover more than six months.

Table 3.5.6 Percent of 2007 PV installations by technology

Count	8
Polycrystalline silicon	60%
Other**	24%
Monocrystalline silicon	16%
Thin films	0%

*Weighted by employees.

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

Polycrystalline silicon was the technology of choice for 60 percent of the solar PV installations in 2007. Sanyo's HIT panels, which combine silicon wafer and thin film technologies, captured almost a quarter of the market in Oregon. No trade allies reported installing thin film solar modules in 2007.

One firm was left out of the table, as they reported 600 employees - many more than the other firms, all of which had 7 or fewer employees. All of this larger firm's installations used monocrystalline silicon.

Barriers to solar PV

Responding solar trade allies were asked to name the greatest barrier to their firm's sales of solar electric systems. Eight trade allies commented, with three noting costs or small amount of incentives and tax credits. Three mentioned the difficulty of explaining all the incentives to consumers. Remaining reasons were:

- Enough time to reach everyone! wintertime blues/perceptions of solar...general economic jitters...new home construction budgets
- Licensing and competition with companies using sub-standard products.

Solar Water Heating

Table 3.5.7 Percent of 2007 revenue from solar water heating

Count	9
0%	33%
1-24%	22%
25%-49%	11%
50%-74%	33%
75%-100%	0%
Don't know	0%

As with percent of revenue from solar electric, revenue from solar water heating varied greatly across trade allies. One third derived over half their revenue from solar water heating, while another third apparently did no solar water heating jobs in 2007.

Table 3.5.8 Percent of 2007 solar water heating revenue from commercial jobs

Count	6
0%	50%
1-24%	50%
25%-49%	0%
50%-74%	0%
75%-100%	0%
Don't know	0%

Of those trade allies who did some solar hot water projects in 2007, half reported no revenue from commercial work, and the remaining trade allies made less than a quarter of their water heating revenue from commercial installations.

Average size of 2007 solar water heating systems

Solar trade allies were asked to estimate the size (in square feet) of their average commercial and residential water heating systems installed. The median was 64 sq. ft. for both commercial and residential installations.

Financing

As with residential trade allies, solar trade allies were asked about their current financing offerings to customers.

Table 3.5.9 Currently offer financing options to customers

Count	9
No	78%
Yes	22%

Less than one quarters of responding solar trade allies currently offer financing to customers, compared with only about half of residential trade allies.

Table 3.5.10 Barriers preventing trade allies from offering financing

Count	7
Not familiar with	43%
Inability to consolidate loan, equipment and installation into one transaction	14%
Does not provide enough value for customer	14%
Interest rates too high	14%
Other	29%

*Multiple response allowed.

The most common reason for not offering financing to customers was lack of familiarity. Two trade allies also wrote in a reason, both stating that they were not interested in getting involved in financing.

Solar Electric and Water Heating Summary & Recommendations

Most solar trade allies installed both solar electric and water heating systems in 2007, with the majority of revenue from residential projects, rather than commercial. All trade allies saw an increase in inquiries about solar electric systems in 2007, and most were able to pursue all qualified leads. Upfront costs are still seen as the greatest barrier to sales of solar PV systems. Few trade allies offer financing to their customers, citing lack of knowledge about financing and general disinterest in taking on the task at their firm.

3.6 General comments and suggestions for Energy Trust

Trade allies were given the opportunity to contribute up to five open-ended comments or suggestions for Energy Trust. Eighteen respondents provided at least one comment; a total of 41 responses were received. Responses were not able to be categorized.

4. Summary & Recommendations

General Program Demographics & ODOE tax credits

Seventy percent of trade allies indicated that they have been working with the agency for more than two years. Almost one third (32 percent) received a majority of their revenue from projects involving Energy Trust incentives. The proportion of work done in Clark County, Washington was low, with 81 percent of trade allies drawing less than a quarter of their revenue from that area.

Despite most trade allies working with Energy Trust for several years, a notable portion were not completely familiar with Oregon Department of Energy tax credits. Residential trade allies were the least familiar, with 42 percent only having heard of the tax credits or not knowing how to answer the question. This has been an issue in past trade ally surveys.

Recommendation

- Energy Trust should seek to provide trade allies with training on the tax credits and tools to help them promote the BETC and RETC to customers.

Marketing, networking, rewards, and training feedback

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

Marketing:

- Cooperative advertising support.....54%
- Ad calling attention to Energy Trust programs.....48%
- One-on-one marketing consulting provided by Energy Trust.. 37%
- Marketing workshops..... 39%
- Marketing to boost Energy Trust brand recognition..... 47%

Networking Opportunities:

- Networking within your specialty/trade.....37%
- Networking within your program (across trade)..... 39%
- Networking within your region..... 40%

Rewards:

- Scholarships to energy conferences.....40%
- Publicity through press releases.....51%
- Trade Ally of the month..... 32%
- Case studies of trade allies.....32%
- Award ceremonies.....20%

Training:

- General training on Energy Trust programs.....63%
- Technical training on energy efficiency.....42%
- Technical training on program measures and compliance..... 38%
- Small business management..... 15%

Recommendation

- Trade allies were primarily interested in more training on Energy Trust programs. Rather than a comprehensive training that might cover most of the programs and aspects trade allies are already familiar with, Energy Trust might consider having a Question and Answer session, or making such a session part of a trade ally roundtable.

Insider Newsletter

Trade allies generally find the newsletter helpful, with a large majority reporting it was ‘somewhat’ helpful. However, 45 percent of trade allies were not fully aware of the newsletter.

Recommendation

- In the future, more specific survey questions should be employed to elicit feedback about vendor expectations of the newsletter. Open-ended comments suggested more informative articles covering problems trade allies encounter and related solutions, as well as progress updates on Energy Trust program goals.

Energy Trust Website

Most respondents visit the trade ally webpages occasionally, usually to download forms and view incentives. When asked for suggestions for changes to the website, most respondents requested improved navigation to find information more easily. The majority of trade allies were interested in online forms.

Recommendation

- When making website improvements consider giving priority to improving navigation, putting forms on one page, and enabling online form submission.

Efficiency Program Satisfaction

High levels of satisfaction were reported across all categories from trade allies.

Percent expressing ‘Satisfied’ or ‘Very satisfied’ responses for:

- Overall satisfaction..... 78%
- Interactions with staff..... 73%
- Response times.....67%
- Requests for information.....74%
- Requests for help on forms..... 75%

Renewable Program Satisfaction

Renewable contractors indicated high levels of satisfaction across all categories, with the exception of paperwork approval and responsiveness to inquiries.

Percent expressing ‘Satisfied’ or ‘Very satisfied’ responses for:

- Overall satisfaction.....78%
- Turnaround time for paperwork approval.....66%
- Responsiveness of staff to inquiries 66%
- Quality of Energy Trust inspectors.....100%
- Quality of your relationship with inspectors..... 100%

Commercial Trade Ally Findings and Recommendations

Commercial respondents primarily installed lighting (8).

Recommendation

- Apart from occupancy sensors, relatively few projects involved the installation of lighting controls. Energy Trust may want to promote lighting controls more aggressively.

Industrial Trade Ally findings

Only 6 industrial trade allies responded to the survey; they reported a variety of primary measures installed.

Recommendation

- Low response rate among industrial vendors has been a consistent feature of trade ally surveys since 2005. For subsequent surveys, Energy Trust should explore ways to improve the response rate among vendors in this program, as it represents a substantial portion of the agency's overall budget.

Residential Trade Ally Findings and Recommendations

The majority of residential respondents installed gas furnaces (24). This was followed by windows, heat pumps, insulation and site-built homes.

Recommendation

- The markets for gas furnaces and heat pumps have been dramatically transformed, and Energy Trust should consider adjusting its incentives for these measures.

Solar Trade Ally Findings and Recommendations

Most responding solar trade allies installed both photovoltaic and water heating systems in 2007. Most of their revenue came from residential, rather than commercial, projects. All firms saw an increase in inquiries about solar electric systems compared to 2006, and were able to pursue almost all qualified leads.

Recommendation

- Among the programs, solar trade allies were the most interested in networking opportunities; Energy Trust should explore opportunities to introduce solar trade allies to other professionals in the field.