To all CAC members and ETO staff:

Goal is to make HER better and more valuable to consumers. That makes sense.
What is not working that you are trying to fix?
The program works as it is, results are good, and savings are good (based on your own reports/statistics). The economy is bad not the HER process. Focus on getting customers to do more, deep energy savings for every house. Low interest financing or larger rebates. Make it irresistible for homeowners.
What are ETO goals for 2009 for HES residential program? More measures per job, more jobs less measures, deep energy savings per house, more HPwES jobs,

A Contractor(s) perspective on HER changes
The following is my opinion and opinions from contractors I have talked with. I feel it is my responsibility to share this in a clear, concise way as part of ORA contractor representative on CAC. In business you have to learn what you do best and focus on that. It is very difficult to be all things to all people. You can please some of the people all of the time, all of the people some of the time. You can never please all of the people all of the time.

Ideas for making HER better:

1. What are FAQ from customers - come up with answers for all questions,
    a. Have a page or two of these to handout to consumers
    b. FAQ air & duct testing and HPwES. Set answers that all HER staff uses.
2. Questionnaire for customers to determine best route/path
    a. Contractors can help develop this with ETO staff
        i. Insulation no testing
        ii. Air & duct testing, insulation bid.
        iii. **HPwES** – Complete testing, insulation bid, furnace bid, solar too if they want it.
3. Change the name. **Home Information Review** (HIR). HER is not an audit and should not be thought of as one. **Do what you do best promote the programs, incentives and Trade Allies.**
4. Not giving price estimates as hard as that may be.
    a. Always old pricing and never current or accurate.
    b. Conditions of crawl, attic, and walls can vary pricing dramatically.
    c. Causes more issues than it solves.
    d. Experience with past programs (over 20 years); this did not help get customers to do more work. PGE got away from this after many years.
    e. ETO is trying to do the same as what has already been tried by PGE in the past.
5. Give information about programs and rebates.
    a. Encourage any and all improvements that will save energy.
    b. More you can do the more you can save.
    c. It is not just about energy savings. Global warming, climate change, carbon footprint.
    d. How many home improvements actually save money monthly?
    e. Home Performance with Energy Star (HPwES) evaluation best way to get overall savings options for your home with payback calculations.
    f. Contractors are more qualified/certified than we are (HER staff) to make recommendations for you home. They should test to confirm good and bad about your home. Visual inspections are not as accurate.
    g. Call a few contractors and ask questions. Find contractor you feel comfortable with and feel you can trust.
6. Priorities for Homeowners – **Always in this order based on HPwES training:**

a. Fix the building shell to hold in heat/cool longer and slow temperature change of home year round. Tight and insulated building & ducts.
b. Upgrade heating, appliances, lighting & hot water system to more efficient type.
c. Then add solar options – lower load less solar needed.

Issues contractors have that will prevent large support for HER estimates & recommendations:

1) How does ETO/CSG support contractors when Home Review information is not accurate?
   a) Contractor who has more extensive training views issues differently than HER person with very little training. Usually no certification.
   b) HPwES contractor views priorities differently, with HomeCheck as backup for reasoning and much more training.
   c) Testing of house & ducts or HPwES testing is only way to accurately prioritize what shell measures should be done.
   d) Information going out now from HER people as far as R-values is not always accurate now.
   e) Issues already exist with HER information not accurate. Some are giving priority recommendations now.
   f) Some HER people say "Windows (furnace, floor insulation, wall insulation) is last thing to do". They should encourage **EVERY** measure. Give the customer what they want and more.
   g) HER people have good intentions, but not always helping get customers to do work.
   h) We find customers believe whatever they are told by HER staff. It is very hard to convince them otherwise when we don't agree with HER recommendations.
   i) **Who will we call from ETO/CSG** to inform customer that contractor knows better than HER person that was out?
2) **There are very few if any contractors that will support or want to see ETO/CSG do audits for homeowners and give estimates.**
   a) You will create a divide between ETO and contractors.
   b) This is not the way you treat contractor alleys if you want cooperation and more participation and more jobs completed.
   c) Contractors can do the job of auditing better than HER staff. That is what we have paid for training to be able to do. That is our business.
   d) HPwES home assessment is the best way to get estimates of all needs for homeowners with estimate and cost savings as accurately as possible. If it is not of value why promote HPwES.
   e) I have not met a contractor yet who thinks this is a good idea. If there is a contractor reading this that thinks it is a good idea. Please stand up and give reasons why you feel that way.
   f) ETO will dilute the value of air & duct testing and HPwES home assessments. Home owners will be more confused and wonder, why pay a contractor when ETO will do an audit for free.
   g) Customers will expect contractors to meet or beat ETO estimates and question why they are different/higher than ETO estimates.

Respectfully submitted to CAC & ETO staff members for the April 15th meeting. Hopefully this saves time for all at the meeting. I believe you will be hearing from contractors at the meeting to confirm my beliefs as expressed. Please ask them weather they agree or not with my thoughts.

Paul Case

Paul Case
Home Visions West – HPwES contractor
ORA contractor representative to CAC