

Residential Trade Ally Roundtable Meeting Notes

July 27, 2007

The residential roundtable took place from 8 am-10:15 am. The agenda topics included communications between Energy Trust and trade allies, quality control procedures, and Home Energy Reviews. Not on the agenda, the group discussed the meeting location at Energy Trust. The group concluded that it is difficult to attend meetings and find parking in downtown Portland, particularly with the trucks often used by trade allies. We will research alternative locations for future meetings.

Communications

Trade allies emphasized communications – between Energy Trust and trade allies -- as a key to success. They asked for a longer lead time before changes are made to measures. They asked that Energy Trust provide 60-90 days notice whenever possible. There was also a request that we clearly show ‘Energy Trust’ in the subject line of all e-mail messages to avoid having messages deleted, unread. Energy Trust has agreed to a 30-day notification policy, but will send out notifications beyond 30 days in advance, if possible.

Trade allies requested that we post notes from the roundtable meetings on our website. We will begin with notes from the 7/27/07 meeting.

Quality Control Procedures

Customer communications were also addressed during the meeting. There was a request that we make all QC letters for customers very clear. The concern is that some customers will perceive anything less than perfect marks on an inspection as a serious problem. One trade ally also brought up the opposite argument, saying the QC forms lose credibility if there is no check-box for jobs that fail QC. Walter Money clarified that any failures will be noted in the comments box on the form. He also stated that our expectation is high quality work and complete cleanup after projects are finished. He said we will call contractors back for problems or incomplete work. The trade ally concern is that we may call contractors back for petty problems that don't make a difference in energy savings. Tom Beverly asked that contractors contact him if any of our programs consistently set unrealistic expectations.

Energy Trust Marketing

The group asked that Energy Trust enlarge the 1-866-ENTRUST number on all mailings and promotional materials sent to customers. They stated that customers miss the small phone number, and too often call the contractors for clarification. It creates an administrative burden for the contractors. Energy Trust will address this request in future marketing materials.

There was a question about the checklist attic sticker CSG provided to trade allies. The group was unclear if the sticker was required, or when it should be used. The sticker is not required, but is a helpful reminder for customers.

There was a suggestion that we develop a video showing a home energy review and the meaning of our measures as a leave-behind for customers. There is also the possibility of posting the video clip on the Energy Trust website, and trade allies could send people there to review it.

The meeting ended at 10:15am. The next meeting is tentatively scheduled for the morning of October 5, 2007.