EnergyTrust of Oregon, Inc.

2007 Trade Ally Service Plan

07/24/07 Tom Beverly, Customer Services Manager

Background

Energy Trust's trade ally network is a vital link with our program participants. As much as one third of our new participant referrals come directly from trade allies, and they are often the only point of contact with Energy Trust participants. Therefore, educating and serving our trade ally contractors is extremely important to our success.

For the last three years Energy Trust's evaluation department has conducted a trade ally survey to obtain feedback about satisfaction levels and opportunities for improvement. Each year the survey has become more sophisticated and has obtained better data about our trade allies' needs. The service plan for the remainder of 2007 and early 2008 is based on the most recent survey findings and recommendations provided by the Evaluations group. This plan addresses centralized Energy Trust support for ongoing program-level trade ally coordination.

Summary

The overall goal of trade ally coordination is to make our interface with trade allies as simple as possible, so they can quickly get the information and help they need. Reducing forms and redundancies will help reduce the amount of time and trouble trade allies experience in getting information. Centralizing trade ally coordination within Energy Trust will reduce redundancies across programs and reduce confusion among trade allies. Internal trade ally coordination will require a part-time administrative staff-member.

Better and more frequent communication with trade allies will allow them to be involved in decision making and will result in their buy-in to program updates, or at the very least their understanding of the reasoning behind the changes.

Improved perks for trade allies will give them more reasons to become affiliated with Energy Trust, and provide our incentives to more customers.

Marketing and Training

Trade allies responding to the survey indicated a high level of interest in the following areas:

- Cooperative advertising support
- Ads expressing thanks to our trade allies
- Marketing to boost Energy Trust brand recognition
- Scholarships to energy conferences
- Publicity through press releases
- Training on Energy Trust programs and compliance

Three of our programs offer extensive cooperative advertising support: ENERGY STAR® New Homes, Home Energy Solutions, and Solar. All three provide reviews of advertising materials and funding to help pay for marketing efforts.

58% of the trade allies surveyed showed an interest in cooperative advertising support and Energy Trust advertising expressing thanks to our trade allies in local papers. We will continue to offer cooperative marketing in the New Homes and Existing homes programs, and consider additional funding for the

2008 budget. We will also discuss cooperative marketing funds with the other programs which do not presently offer them, and determine what levels of funding can be provided in 2008.

We will also provide general Energy Trust advertisements in regional newspapers to recognize local trade allies and thank them for their efforts. Advertisements will be run in the first quarter of 2008.

The Energy Trust trade ally coordinator will also work with regional trade allies to determine the best ways to market Energy Trust programs in southern Oregon. In 2008, this initiative can be included in the budget and expanded for other parts of the state. The trade ally coordinator will work closely with the rest of the marketing and communications department, and program management contractors, to ensure consistency of messaging.

Energy Trust presently offers four 50% scholarships to the Sustainable Building Advisor programs in Bend and Gresham. 2007 is the second year we have provided these funds, and response has been strong. We will expand this scholarship program for trade allies in 2008. We will research additional training opportunities for trade allies in 2007, and include them in the 2008 budget.

Trade allies indicated interest in press releases for additional publicity. Energy Trust provides press releases on a regular basis, and will continue to include trade ally quotes and information in them.

Training efforts will focus on Energy Trust programs and measure compliance. The trade ally coordinator plans periodic update meetings for trade allies in locations throughout the state. There will be 3 or more such meetings before the end of October 2007. We will also hold informational sessions on the Oregon Department of Energy's state energy tax credits. These sessions are frequently held together with workshops about our programs so all relevant information is covered in one session. We will hold 3 or more of these sessions throughout the state to provide information to as many trade allies as possible. Additional program training will be scheduled for 2008.

Energy Trust has also implemented quarterly trade ally roundtable meetings. These meetings provide a forum for trade allies to discuss concerns or suggestions with Energy Trust staff and with each other. These roundtable sessions will continue in 2008.

Insider Newsletter

Most trade allies who responded to the survey found Insider to be at least somewhat useful. Insider is presently used to provide updates on program information, and articles about events in the energy efficiency and renewable energy field. To improve Insider for our trade allies, we will provide additional links to other websites and newsletters beyond those of Energy Trust, to provide even more useful information. We also plan to highlight specific success stories and trade allies in future issues.

To gain more feedback about Insider, we will implement another brief survey with a link from the September/October issue. The survey will include more specific questions about how we can make Insider more useful to our trade allies. We will act on the results during the third quarter of 2007.

Future Insider issues will focus less on general marketing and more on specific measures, technical information, compliance, updates, and success stories. Insider will remain a valuable tool for communicating with trade allies.

Website

Trade allies had few opinions or suggestions about the Energy Trust website. There were a small number of requests to improve the site by making it easier to navigate.

The marketing department has plans to implement a website usability study in late 2007, and findings from this study will be used to improve ease of navigation on all parts of the site, including the trade ally section.

The Energy Trust trade ally coordinator will meet with the web team in late July to redesign the trade ally pages and make them easier to navigate. Trade allies specifically requested easier access to forms, streamlining or automation of forms, and better information on qualifying measures. Each program page will be reviewed for ease of use and ease of locating pertinent information. Changes will be implemented by the end of November 2007. The focus of the trade ally pages will be shifted from recruitment to information and services, and program management contractors will be included in the discussions.

Communications and Outreach

General communications with trade allies have improved in the past 6 months. In 2006, residential trade allies expressed concerns over the timeliness of program updates. A new procedure was designed to ensure more timely communications. The Energy Trust trade ally coordinator monitors upcoming program changes, and ensures the PMC coordinators send multiple communications to trade allies as far in advance as possible. All correspondence with trade allies is passed through the Energy Trust trade ally coordinator for review before being passed on to the rest of the marketing and communications department.

Energy Trust communicates updates with trade allies through meetings, e-mails, postcards, letters, and through Insider. Program updates are provided by multiple means to ensure trade allies receive the information. The trade ally roundtable is another way that program updates can be discussed, and allows the trade allies to give their ideas and discuss them as a group. Also, the website is used as a communication tool, and counting both trade allies and participants, is the second most visited portion of the website, after the Energy Trust homepage.

Trade allies in southern Oregon expressed a need for more efforts in their part of the state to raise general awareness of Energy Trust. To satisfy their needs, CSG has hired a market outreach manager to improve awareness in the outlying parts of the state, including southern Oregon. The Energy Trust trade ally coordinator is researching additional ways to improve awareness in southern Oregon, and also is working with the Douglas County Global Warming Coalition to provide more presentations and visibility for Energy Trust. The Douglas County Global Warming Coalition is helping coordinate between CSG and the Umpqua Community Action Network (UCAN). UCAN has suggested they can provide home energy reviews in their territory. Their reviewers are trained to our standards, and would only need program-specific training from CSG.

We will also hold meetings for Cascade Natural Gas vendors and trade allies in Pendleton and Baker City in an effort to recruit more trade allies in those areas. Cascade Natural Gas is cooperating to provide information on potential trade allies from their network, and will participate in the meetings.

Centralized Trade Ally Support

The Energy Trust trade ally coordinator is researching the possibility of having a single form and process to sign contractors as trade allies of Energy Trust. Under this model, trade allies would have an agreement directly with Energy Trust instead of with the PMCs. They would still need program-specific

training and certifications, but they would be trade allies for all programs for which they had the proper training. Energy Trust would also develop and administer procedures for trade allies, including de-listing based on poor customer service, workmanship concerns, or other issues.

The responsibilities of maintaining trade ally files, verifying insurance and license information, and the bulk of trade ally correspondence would be moved in-house. As program management contractors change, the trade allies would remain under agreement with Energy Trust, and there would be less confusion about which programs trade allies worked with. Reducing forms and confusion is a request trade allies have repeatedly made. The job duties would require at least a part-time position to maintain information and review new applications.

We are presently reviewing trade ally requirements for each program, and determining the best way to merge forms. We are also researching the differences between what we provide under the current model and what the PMC trade ally coordinators provide. Once we have that list of responsibilities, we can determine what activities can be done internally, and what should be left at the PMC level. Any proposed staff addition would be addressed in the 2008 budget process.

2007 Recommendations	2007 Service Plan	2006 Service Plan
Provide Training on Energy Trust programs and measure compliance	• Provided 4 program training sessions for residential trade allies and Cascade Natural Gas dealers • Scheduled 2 additional sessions for Cascade Dealers and trade allies in Pendleton and Baker City August 15-16 • Will schedule 3-4 workshops on incentives and tax credits throughout the state before end of October 2007	• Held 3 marketing workshops in Portland, Bend and Grants Pass • Held 3 incentive and tax credit workshops in Portland, Bend and Grants Pass • Held 2 program overview sessions for Cascade Natural Gas dealers in Bend and Baker City
Improve access to forms on website, streamline or automate forms, provide more information on qualifying measures	• Marketing will conduct a usability study of the website, which can be used to improve the trade ally pages • Will redesign trade ally pages to improve navigation and move forms to better locations • CSG is continuing to improve forms and they are piloting electronic forms with a small group of trade allies • CSG is identifying trade allies with forms problems and individually training them • We will discuss the request for more information on qualifying measures at the roundtable meetings in July • Collectively, the trade ally pages receive the second highest number of visits after our home page	• Two incentive applications replaced multiple forms for residential incentives (HES had the most complex forms) • A new lighting calculation tool was implemented for commercial lighting trade allies

Establish new trade ally relationships – trade ally outreach	• Held meeting for Cascade Natural Gas vendors in Bend • Scheduled two additional meetings for Cascade Natural Gas vendors in Pendleton and Baker City for August • Conducting outreach in southern Oregon in coordination with newly hired market outreach manager from CSG	• No specific recruiting/outreach efforts were outlined for 2006
Ease and simplification of form completion	• CSG has a pilot for electronic forms with selected trade allies • As above, explore adapting the lighting tool for other programs • As above, explore auto-populate options from incentive forms to tax credit forms	• CSG eliminated several forms and combined them • BE introduced lighting tool to simplify calculations and forms for lighting trade allies