Briefing Paper
Central Trade Ally Coordination

09/19/2007

Summary

Energy Trust is working to centralize trade ally coordination and allied technical assistance contractors (ATACs) to reduce confusion among trade allies, improve policies and procedures, and streamline trade ally communications. To make these changes, we intend to bring more trade ally coordination in-house to be the central point of contact between program allies, Energy Trust and program management contractors.

Background

- Each energy efficiency program, and the solar program, maintains its own network of trade allies, and trade ally coordinator.
- Trade ally and ATAC agreements are signed between PMCs and contractors, and must be updated any time we contract with a new PMC.
- Trade allies interested in working with multiple programs must sign multiple (but similar) trade ally agreements, and work with multiple trade ally coordinators to obtain information.
- All trade ally records, such as agreements, CCB license information, certifications, or customer correspondence, are maintained in multiple PMC offices, and review is cumbersome.
- Trade allies have repeatedly asked that Energy Trust streamline communications, forms, and other trade ally processes.

Discussion

To improve communications with our trade allies and control over trade ally records, we intend to centralize control over trade ally recruitment, agreements, and communications. This will reduce PMC trade ally administrative burden.

- Trade ally agreements will be streamlined, and will be directly between Energy Trust and trade ally contractors and ATACs. Individual programmatic requirements or certifications will be addressed through attachments to the umbrella agreement. This will allow trade allies serving multiple programs to have one agreement with the Energy Trust with multiple program attachments as applicable.
- A trade ally coordinator will be hired to handle the administrative tasks of following up with trade allies regarding licensing and certifications, answering questions, organizing meetings, maintaining trade ally records in a central location, and helping with forms.
- PMC trade ally coordinators will continue to provide program outreach and support services in the current fashion. They will be responsible for field training on program-specific information and forms, and will work closely with the Energy Trust trade ally coordinator.
- Trade ally communications will be initiated through Energy Trust, or if initiated by PMCs reviewed by the Energy Trust trade ally coordinator prior to release.

- Customer service issues will be more closely tracked by maintaining central trade ally contact, communication, and records. We will be able to more tightly monitor trade allies, and remove them from our approved list if service issues become too frequent.

Next Steps

- A new trade ally coordinator position will be created and filled with a full time staff member.
- New policies regarding trade ally oversight and enforcement will be drafted and reviewed by Conservation Advisory Council.
- Trade ally agreements will be redesigned to fit the centralized model.
- The new agreements will be distributed before the end of 2007, with a target return date of early January 2008.