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MEMO

Date: September 30, 2008
To: Management Team
From: Tom Beverly, Trade Ally Network Manager
Phil Degens, Evaluations Manager
Subject: Staff Response to Trade Ally Survey Recommendations

Each year, we survey our trade allies to obtain feedback about their interactions with our programs, and what we can do to improve their overall experience in working with Energy Trust. We also use the survey responses to feed into our budgeting process and determine what types of training or program enhancements we can provide to add value to being an Energy Trust trade ally.

The surveys are not intended to be a statistically accurate sample of our trade allies, but rather are meant to be a helpful feedback mechanism. More statistically accurate samples are obtained through our formal program evaluations.

The trade ally survey was fielded in May 2008, and asked trade allies to consider activities in 2007 when they responded. The evaluations team offered the following recommendations *in italics*, based on the survey responses. Staff response follows each recommendation. Some of the actions have already been implemented, and others are in-process or will be put in place in 2009.

Recommendation 1: *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.*

We will solicit participation from the Oregon Department of Energy to provide breakout sessions covering tax credits at the Trade Ally roundtables in November and during the first quarter of 2009. We also will place links to tax credit information on our Web site where appropriate. Web site updates are underway. We will discuss tax credit outreach at the Oct. 30 ODOE coordination meetings and share the results of the trade ally survey with appropriate ODOE staff members.

Recommendation 2: *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.*

We will include more question and answer periods in upcoming trade ally roundtables. We implemented a new meeting format with breakout sessions at the Portland roundtable

meetings on September 11 and 12. The breakouts included a discussion of our planning process. This particular session wasn't well attended, although attendees claimed the discussion was helpful. We will increase the amount of open discussion time at the roundtable meetings in November and in 2009 to allow more questions about Energy Trust programs. We have also implemented program orientation meetings for trade allies joining the New Buildings and Home Energy Solutions program.

Recommendation 3: *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.*

We will review the questions for the next annual survey and design them to obtain more specific feedback about our e-newsletter, Insider, and our communications with trade allies. We also will implement new columns in each issue, starting in January 2009, to address technical issues and common trade ally concerns. Each program will have a designated technical person to provide a feature story on a rotating basis.

Recommendation 4: *When making website improvements consider giving priority to improving navigation, putting forms on one page, and enabling online form submission.*

Web site improvements are underway as a part of our usability study. The trade ally pages are included in the plan to improve navigation, content, and overall value of our Web site. Our plans include simplified access to forms, trade ally bulletin boards, access to program training videos, and improved technical information. Online form submission will be implemented by Energy Star Products, and rolled out to other programs throughout 2009.

Recommendation 5: *Apart from occupancy sensors, relatively few projects involved the installation of lighting controls. Energy Trust may want to promote lighting controls more aggressively.*

We will share this information with commercial sector management so they can consider changes in 2009.

Recommendation 6: *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.*

When we announce the next survey, we will target small groups of trade allies who previously have responded in low numbers. Individual letters or phone calls will help improve the response rate for the next survey.

Recommendation 7: *The markets for gas furnaces and heat pumps have been dramatically transformed, and Energy Trust should consider adjusting its incentives for these measures.*

This recommendation will be shared with residential sector management to determine new incentive levels and measures prior to the scheduled incentive updates in March 2009.

Recommendation 8: *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.*

Solar trade allies are being included in the roundtable sessions, and there is active participation from program staff members to draw more solar trade allies to meetings. The roundtables are a great vehicle for networking among the trades since trade allies from all of our programs are represented. We will continue offering breakout sessions to draw solar trade allies to these sessions.