

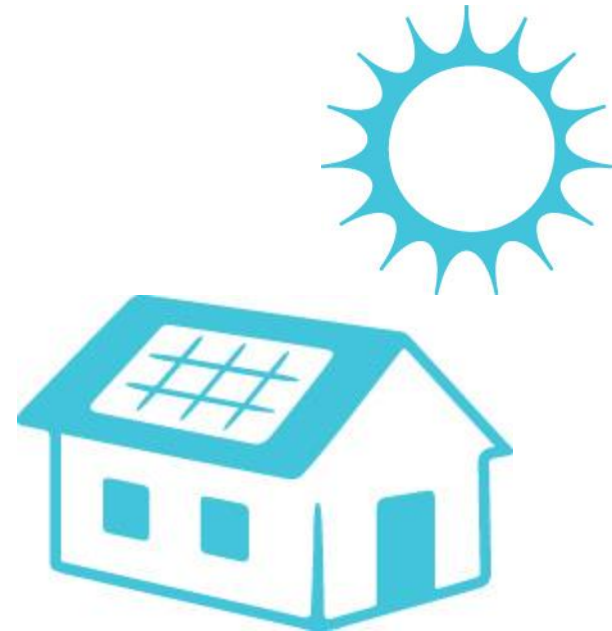


Solar Program Updates
Trade Ally Forums
November 2017



Agenda

- RETC dates to remember
- Getting prepared for 2018
- Technical training
- Program updates and process enhancements
- 2018 draft budget
- Feedback on program ideas



Residential Energy Tax Credit Dates to Remember

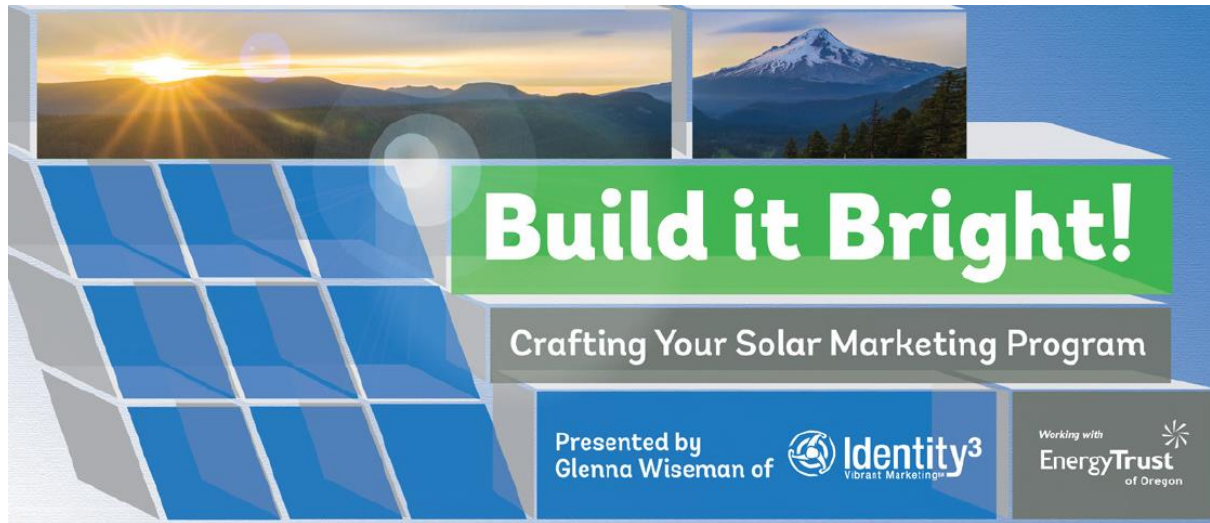
Residential Energy Tax Credit Timeline

Contract signed with Deposit	December 31, 2017
Energy Trust & ODOE Applications Submitted in PowerClerk	December 31, 2017
Project Operational and Jurisdictional Inspection Complete	April 1, 2018
Application Electronically Signed	June 1, 2018



Get Prepared for 2018!

Solar Marketing Training Series



- 6-part training series
- Webinars, podcasts, blog articles and worksheets
- Available on heatspring.com

- 1. Taking Stock**
Assessing the Condition of Your Marketing Foundation
- 2. Mapping Strategy**
Engineering Your Marketing Success
- 3. Presenting Your Best**
Marketing Campaigns and Creative Content
- 4. Efficient Activation**
Tools and Strategies for Efficient Campaign Delivery
- 5. Tracking Results**
Implementing Systematic ROI Reporting
- 6. Putting it All Together**
From Assessment to Tracking Results, Creating the Building Blocks of Your Solar Marketing Program

www.energytrust.org/businessdevelopment

Financial Management Consulting

The following services are eligible for a 50 percent cost match:

1. Complete Financial Management Assessment
2. Hourly Financial Consulting
3. Bimonthly “Remote CFO” Meetings



Business Development Fund

BUSINESS DEVELOPMENT FUND GUIDELINES

SOLAR TRADE ALLY NETWORK

As a trade ally, you may be eligible to receive partial reimbursement for marketing projects and training approved by Energy Trust of Oregon. Using the Energy Trust logo in your marketing pieces positions your business as a solar expert, and participating in training helps your business improve and grow.

Examples of eligible cooperative marketing projects

Print advertisements—Yellow Pages, direct mail and brochures

Digital media—online banner ads, pay-per-click ads

Radio and television advertisements

Outdoor yard signs and billboards

Apparel

Energy Trust trade ally logo may be embroidered or screenprinted on shirts, jackets or hats. Logo must be black or white and oriented horizontally on the left sleeve or chest.

Events

Trade allies can receive reimbursements for pre-approved event display costs.

Website

Website must follow print marketing guidelines and logo must hyperlink to www.energytrust.org/solar.

Training and continuing education

The following pre-approved trainings are eligible for business development funds:

- Trainings and workshops listed on the Training & Education Calendar at www.energytrust.org/ta/solar
- Classes offering continuing education units for Construction Contractors Board (CCB), Building Codes Division (BCC), and North American Board of Certified Energy Practitioners (NABCEP)
- Industry certifications (NABCEP Entry Level Exam, NABCEP PV Installation Professional, NABCEP PV Technical Sales Professional, NABCEP Company Accreditation)
- Conference registrations

REIMBURSEMENT

To request reimbursement for sales, marketing, advertising, or other business development trainings, submit the pre-approval request form available from www.energytrust.org/ta/solar.

www.energytrust.org/businessdevelopment

Business Development Fund

Cooperative marketing

Apparel

Events



Technical Training

Oregon Solar Energy Conference

- 450 Attendees
- 143 Companies
- Expanded Solar Contractor Day
- Save the Date: May 1–3, 2018

A promotional banner for the Oregon Solar Energy Conference 2018. The background is a dark grey grid pattern. On the left, a green box contains the text 'OREGON SOLAR ENERGY CONFERENCE 2018' in white and green. To the right of this box, the dates 'MAY 1-3, 2018' and location 'PORTLAND, OREGON' are written in white. Below that, the text 'Fastest Growing Regional Solar Energy Conference' is written in yellow. On the far right, a light green box contains the text 'REGISTER TODAY!' in black. Below that, the text 'POWERED BY:' is written in white, followed by the 'OSEIA' logo in green and yellow.

OREGON
SOLAR
ENERGY
CONFERENCE
2018

MAY 1-3, 2018
PORTLAND, OREGON

Fastest Growing Regional
Solar Energy Conference

REGISTER TODAY!

POWERED BY:
OSEIA

oregonsolarenergyconference.com

OSEIA Statewide Technical Training



Calendar

OSEIA & Partner Events



Get weekly updates to this calendar:

Subscribe

November 2017



Thu

9

Nov

9:00 AM
4:00 PM PDT



Portland Technical Training - Solar PV Systems ... >
Portland English Language Academy (PELA), Lloyd Center, Portland, OR, Un...

Tue

14

Nov

8:30 AM
12:00 PM PDT



Energy Trust Trade Ally Forum - Portland >
Sheraton Portland Airport Hotel, Northeast Airport Way, Portland, OR, United...

Thu

16

Nov

8:30 AM
12:00 PM PDT



Energy Trust Trade Ally Forum - Bend >
Riverhouse on the Deschutes, North Highway 97, Bend, OR, United States

Program Updates and Process Enhancements

★ ★ ★ Solar Trade Ally Rating System

★ Customer Service ★ Program Service ★ Quality Service

The screenshot shows the EnergyTrust of Oregon website interface. At the top, there is a navigation bar with links for CONTACT US, ABOUT, FIND A CONTRACTOR, and a SEARCH box. Below this is the EnergyTrust of Oregon logo and a menu with categories: RESIDENTIAL, COMMERCIAL, INDUSTRY + AGRICULTURE, and RENEWABLE ENERGY. The main content area features a search filter box with three dropdown menus: 'Zip Code or City & State' (set to Portland, OR), 'Project / Building Type' (set to Solar Electric (Photovoltaic)), and 'I need help with' (set to View All). There is an 'Advanced Search' link and a 'FILTER' button. Below the filter box, it states 'Your Results: 10 of 63 Solar Electric (Photovoltaic) trade ally contractors'. A table displays the search results with columns for DISTANCE, COMPANY, PHONE, RATING, SERVICES, and CREATE A LIST. The first result is for All-Star Solar, located 0.25 miles away, with a phone number of (503) 555-5505, a three-star rating, and services for Solar Commercial and Solar Residential. There is an 'Add (Up to 3)' button next to the services column.

CONTACT US ABOUT FIND A CONTRACTOR SEARCH

EnergyTrust of Oregon RESIDENTIAL COMMERCIAL INDUSTRY + AGRICULTURE RENEWABLE ENERGY

Zip Code or City & State: Portland, OR Project / Building Type: Solar Electric (Photovoltaic) I need help with: View All

Advanced Search FILTER

Your Results: 10 of 63 Solar Electric (Photovoltaic) trade ally contractors

DISTANCE	COMPANY ▲	PHONE	RATING	SERVICES	CREATE A LIST
0.25 mi	All-Star Solar	(503) 555-5505	★ ★ ★	Solar Commercial, Solar Residential	<input type="checkbox"/> Add (Up to 3)

Expedited Solar Incentive Payments

INSIDER

EXCLUSIVE NEWS FOR TRADE
AND PROGRAM ALLIES

Newsletter Signup 



Residential ▾

Commercial ▾

Industry + Agriculture

Solar

Resources ▾

Search



Incentive payments expedited for projects with only minor corrections required

August 04, 2017




Over the past 12-months, solar trade allies completed 1,624 solar projects. Out of that total, 418 or 26 percent of those projects needed corrections to be addressed before the solar installation met all program requirements and 147 of those projects had only corrections classified as minor. Currently, solar trade allies must provide evidence that all corrections have been addressed and the project meets Energy Trust [solar program installation requirements](#) before an incentive check can be issued.



Starting August 14, 2017, the solar program will begin expediting incentive payments for projects that are found to have only minor corrections required. The solar program will send a notification listing the correction(s) to both the contractor and the customer.

TRAINING + EVENTS

[See All](#)

-  Sustainable Homes Professional (SHP)
-  Appraising Energy Efficient Homes
-  Women in Energy & Renewables Networking Happy Hour

POPULAR UPDATES

- [Early preview of potential 2018 Existing Homes incentive changes \(Existing Homes\)](#)
- [Early preview of potential 2018 New Homes incentive changes \(New Homes\)](#)
- [Early preview of potential 2018 Existing Multifamily incentive changes \(Existing Multifamily\)](#)
- [Existing Buildings incentive changes effective January 1, 2018 \(Commercial SW Washington, Existing Buildings\)](#)
- [How to determine the best location for](#)

Consumer Education & Leads



COMING SOON

How It Works



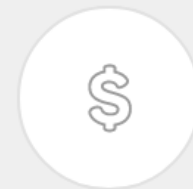
Review Personal Estimate

Find out your solar savings potential based on your rooftop characteristics, your electricity use, Roseville Electric rates and available tax credits and rebates.



Compare Options

View options side-by-side to understand how different scenarios impact your wallet in the near-term and long-term.



Make an Informed Decision

If solar seems like a good investment for you, we're here to help you get started.

Remote Site Verification



A SIMPLE WAY TO
RECORD JOB SITE
INFORMATION

COMING SOON

Photo: [unclear]
SiteCapt [unclear]
organiz [unclear]
[unclear] Industry.

SiteCapture™ is a [unclear] application that allows users to easily capture job site images and data on a mobile device that automatically catalogs and organizes for long term storage. SiteCapture™ integrates directly with your Enterprise or CRM application for real time data transfer and permanent storage. Managers can review job site progress in real time.

SITE[O]CAPTURE

SITE[O]CAPTURE

PowerClerk 2.0



Trade Ally Website

INSIDER

EXCLUSIVE NEWS FOR TRADE AND PROGRAM ALLIES

Newsletter Signup



Residential ▾ Commercial ▾ Industry + Agriculture Solar Resources ▾

Search



SOLAR

FEATURED

April 4, 2017

Solar jobs increased 50 percent last year in Oregon

The number of solar jobs available increased in 44 U.S. states, in 2016, according to the...



Solar

April 4, 2017

Solar trade allies eligible to receive financial management consulting

Energy Trust has contracted with Kendrick Business Services to offer solar trade ally contractors up to...



Solar

April 4, 2017

SOLAR

Overview

Incentives

Trade Ally Rating

Business Development

Program Training

Solar Ready

Forms & Resources

ENROLL IN THIS PROGRAM

TRAINING + EVENTS

See All

11 APR

Biannual Trade Ally Forum - Portland

insider.energytrust.org/solar

2018 Draft Budget

2018 Draft Budget for New Incentives

	PGE	Pacific Power	Total
Residential	\$1.8 million	\$0.9 million	\$2.7 million
Business	\$1.8 million	\$0.9 million	\$2.7 million
Solar Ready, PDA & Incentive Adders	\$0.42 million	\$0.25 million	\$0.67 million
Total	\$4.02 million	\$3.42 million	\$6.7 million

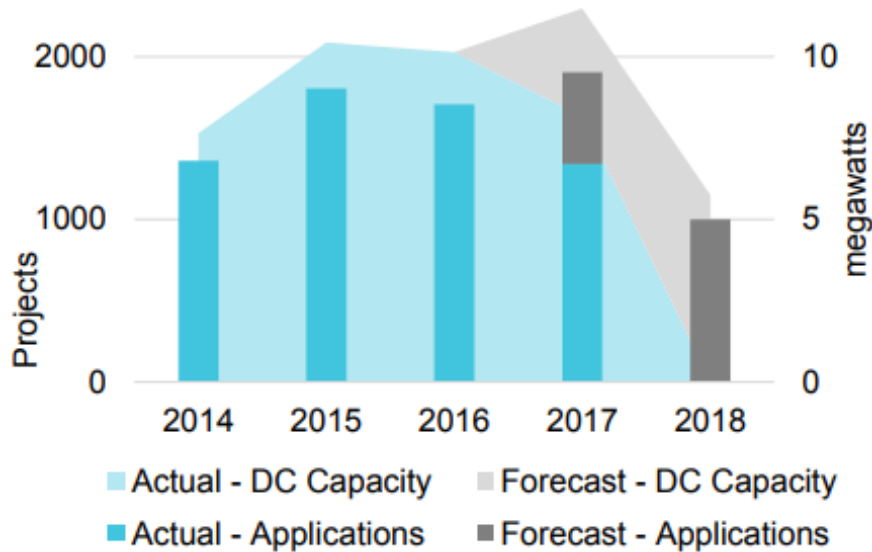


2018 Solar Forecast

Residential

Approximately:

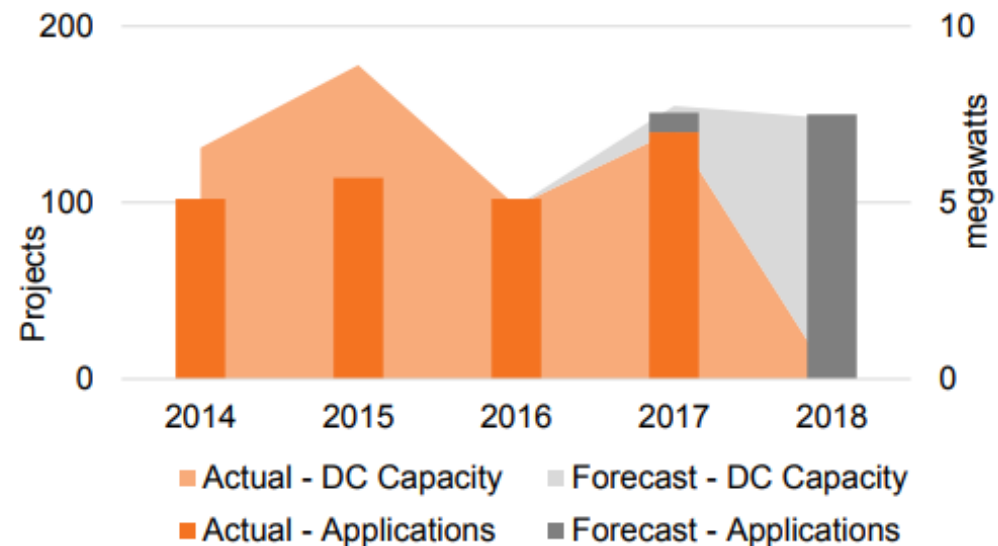
- 1,000 projects
- 6 MW capacity
- About \$0.60/W incentive
- ~50% reduction in volume



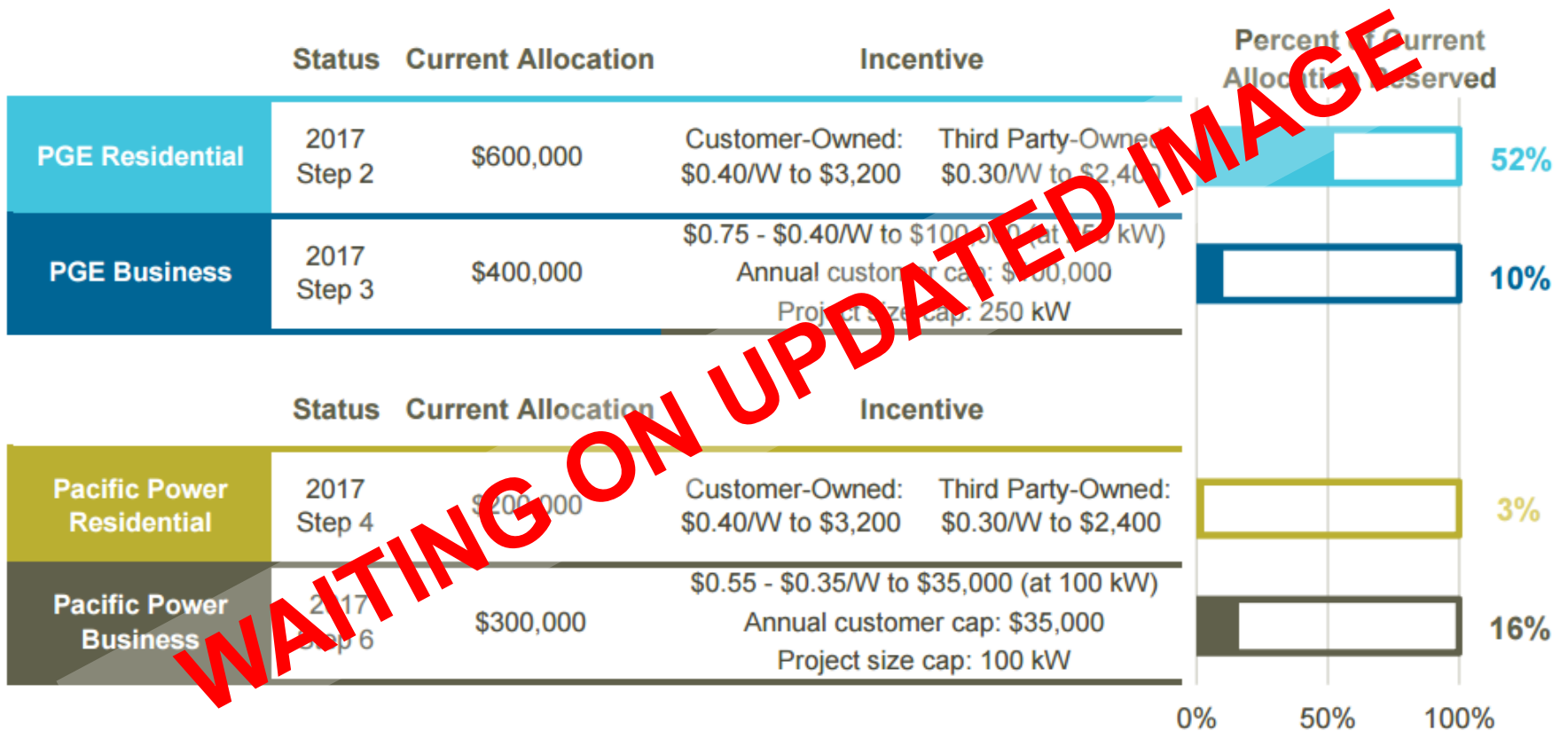
Business

Approximately:

- 150 projects
- 7 MW capacity
- About \$0.45/W incentive
- Similar volume



Solar Incentive Status Report



www.energytrust.org/solarstatus

Trade Ally Feedback

Questions?

Jeni Hall

Sr. Project Manager—Solar

jeni.hall@energytrust.org

503.459.4075

