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
<table>
<thead>
<tr>
<th>Event</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contract signed with Deposit</td>
<td>December 31, 2017</td>
</tr>
<tr>
<td>Energy Trust &amp; ODOE Applications Submitted in PowerClerk</td>
<td>December 31, 2017</td>
</tr>
<tr>
<td>Project Operational and Jurisdictional Inspection Complete</td>
<td>April 1, 2018</td>
</tr>
<tr>
<td>Application Electronically Signed</td>
<td>June 1, 2018</td>
</tr>
</tbody>
</table>
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

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

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
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, United States

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 States

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 ★ ★ ★

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

<table>
<thead>
<tr>
<th>DISTANCE</th>
<th>COMPANY</th>
<th>PHONE</th>
<th>RATING</th>
<th>SERVICES</th>
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</thead>
<tbody>
<tr>
<td>0.25 mi</td>
<td>All-Star Solar</td>
<td>(503) 555-5505</td>
<td>★ ★ ★</td>
<td>Solar Commercial, Solar Residential</td>
</tr>
</tbody>
</table>
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 expedite incentive payments for projects that are found to have only minor corrections required. These projects will be reviewed and payments are expected to be issued within 28 days.
COMING SOON

Is Solar Right for Me?
Take the first step towards understanding your savings potential. Calculate how much you can produce your own electricity, reduce your electricity cost and make your footprint smaller.

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 INFORMATIONS

SiteCapture™ is an app 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.

COMING SOON
PowerClerk 2.0

COMING SOON
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...
2018 Draft Budget
# 2018 Draft Budget for New Incentives

<table>
<thead>
<tr>
<th>Category</th>
<th>PGE</th>
<th>Pacific Power</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Residential</td>
<td>$1.8 million</td>
<td>$0.9 million</td>
<td>$2.7 million</td>
</tr>
<tr>
<td>Business</td>
<td>$1.8 million</td>
<td>$0.9 million</td>
<td>$2.7 million</td>
</tr>
<tr>
<td>Solar Ready, PDA &amp; Incentive Adders</td>
<td>$0.42 million</td>
<td>$0.25 million</td>
<td>$0.67 million</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$4.02 million</strong></td>
<td><strong>$3.42 million</strong></td>
<td><strong>$6.7 million</strong></td>
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</table>
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

<table>
<thead>
<tr>
<th>Status</th>
<th>Current Allocation</th>
<th>Incentive</th>
<th>Percent of Current Allocation Reserved</th>
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</thead>
<tbody>
<tr>
<td><strong>PGE Residential</strong></td>
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</tr>
<tr>
<td>2017 Step 2</td>
<td>$600,000</td>
<td>Customer-Owned: $0.40/W to $3,200</td>
<td>52%</td>
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<tr>
<td></td>
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<td>Third Party-Owned: $0.30/W to $2,400</td>
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</tr>
<tr>
<td><strong>PGE Business</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2017 Step 3</td>
<td>$400,000</td>
<td>$0.75 - $0.40/W to $100,000 (at 100 kW)</td>
<td>10%</td>
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<tr>
<td></td>
<td></td>
<td>Annual customer cap: $100,000</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Project size cap: 250 kW</td>
<td></td>
</tr>
<tr>
<td><strong>Pacific Power Residential</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2017 Step 4</td>
<td>$200,000</td>
<td>Customer-Owned: $0.40/W to $3,200</td>
<td>3%</td>
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<tr>
<td></td>
<td></td>
<td>Third Party-Owned: $0.30/W to $2,400</td>
<td></td>
</tr>
<tr>
<td><strong>Pacific Power Business</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2017 Step 6</td>
<td>$300,000</td>
<td>$0.55 - $0.35/W to $35,000 (at 100 kW)</td>
<td>16%</td>
</tr>
<tr>
<td></td>
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<td>Annual customer cap: $35,000</td>
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</tr>
<tr>
<td></td>
<td></td>
<td>Project size cap: 100 kW</td>
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</tr>
</tbody>
</table>

www.energytrust.org/solarstatus
Trade Ally Feedback
Questions?

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jeni.hall@energytrust.org
503.459.4075