



Trade Ally Forums

October 2025

Thank You Team!



Ben Thompson
Trade Ally Network Specialist
Energy Trust



Ashley Prentice
Trade Ally Network Specialist
Energy Trust



Tom Beverly
Customer Experience Manager
Energy Trust



Erica Carlson
Trade Ally Manager
Existing Buildings



Eric Falk
Field Manager
Residential



Ciera Milkewicz
Sr. Program Consultant
Residential

Thank You Team!

Abi Sloan - Administrative Assistant

Amanda Zuniga - Program Manager - Commercial

Amber Coates - Market Engagement Manager

Andy Slaybaugh - Existing Buildings Account Manager

Angel Glockling - Program Consultant

Arpana Nautiyal - Portland Metro Outreach Manager

Austin Powers - Residential Account Manager

Cameron Starr - Customer Experience Operations Lead

Caryn Appler - Outreach Lead

Chase Ferrara - Existing Buildings Account Manager

Dan Pierce - Residential Account Manager

Dani Wilgus - Eastern Oregon Outreach Manager

Danni Mar - Residential Account Manager

Derrick Noll - Residential Account Manager

Don Francis - Residential Account Manager

Eduardo Beltran - Project Manager - Renewables

Gabriela Esparza - Existing Buildings Account Manager

Heather McNeill - Southern Oregon Outreach Manager

Isaiah Kamrar - Program Manager - Residential

Jake Foster - Residential Account Manager

Jimmy Balderas - Program Consultant

John Koeger - Residential Account Manager

Kaitlin Torney - Residential Account Manager

Kelsey Martin - Existing Buildings Account Manager

Kyle Holmes - Solar Account Manager

Lori Lull - Program Strategies Manager - Renewables

Maria Robinson - Willamette Valley & Coast Outreach Manager

Marshall Johnson - Sr. Program Manager - Residential

Megan Greenauer - Program Manager - Communities and New Initiatives

Michelle Poole - Existing Buildings Account Manager

Nate Merrill - Central Oregon Outreach Manager

Nick Jones - Operations Specialist - Residential

Nikita Chan - Solar Account Manager

Patrick Urain - Sr. Program Manager - Commercial

Scott Leonard - Program Manager - Residential

Shannon Wall - Project Manager - Renewables

Sid Dyer - Existing Buildings Account Manager

Todd Ashley - Training Manager - Residential

Jeff Boyer - Multifamily Energy Advisor Manager

What is new this year?

- session handouts – resources for post-forum reference
- QR code – if prefer forum resources digitally, scan the code at bottom of agenda
- forum evaluation – code at the bottom of the agenda
- lunch – 12:30 – 1:30 pm
- afternoon sessions – 1:30 – 2:30 pm

Mt. Hood A and B	Mt. Hood C	Cascade Rooms A and B
Topic: Contractor Connections for HOMES/ HEAR (meeting and connecting for project partners)	Topic: Question and Answer on Incentive Changes	Solar <u>PCEF</u> Grant Update
Host: Scott Leonard	Host: <u>CLEAR</u> Result and Energy Trust staff, Processing Team	Host: Energy Trust staff

Agenda

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|----------------------|---|
| 8:00 – 8:30 | Breakfast with Account Mangers & Vendor Networking |
| 8:30 – 8:50 | Welcome and Updates from Energy Trust |
| 8:50 – 9:20 | Keynote Address: Oregon Department of Energy |
| 9:20 – 9:40 | Trade Ally Awards |
| 9:40 – 10:00 | Break & Vendor Networking |
| 10:00 – 11:00 | Morning Sessions |
| 11:00 – 11:15 | break |
| 11:15 – 12:15 | Late Morning Sessions |
| 12:15 – 12:30 | Raffle and Forum Evaluations |

Agenda (morning)

9:30 – 10:30

Breakout Sessions (select one)

Ballroom 1 & 2: IRA Programs Update for Trade Allies

Learn more about Inflation Reduction Act Home Energy Rebates (HOMES & HEAR) programs, how to participate and when incentives will become available with representatives from Oregon Department of Energy and Energy Trust of Oregon.

Presenter: Scott Leonard

Boardroom: Solar Program Updates

Learn about solar program updates and best practices such as closing out 2025 projects with the Residential Clean Energy Credit going away, solar and storage incentive plans for 2026, and other general program updates.

Presenter: Lori Lull, Kyle Holmes

Agenda (late morning)

11:15 – 12:15 Breakout Sessions (select one)

Ballroom 1: IRA Programs Update for Community Based Organizations

This is a CBO-only session for CBO staff to learn about CBO participation in the HOMES & HEAR programs. Presenter: Scott Leonard

Ballroom 2: Market Trends and Forecasts for Residential/Multifamily

Energy Trust will present information about program trends and resources to support trade allies working with Existing Buildings, Multifamily and Residential.

Presenter: Nate Merrill

Boardroom: Solar Program Updates Continued

Learn about Energy Trust of Oregon's new Smart-E Loan offer and information on how you can start offering this financing product to your customers as a Solar Trade Ally.

Presenter: Lori Lull, Kyle Holmes

Agenda (afternoon)

1:30 – 2:30

Breakout Sessions (select one)

Ballroom 1: Contractor Connections for HOMES/HEAR

This an opportunity to meet and connecting for project partners under HOMES/HEAR

Host: Scott Leonard

Ballroom 2: Question and Answers on Energy Trust Incentive Changes

This is an opportunity to ask specific questions regarding Energy Trust incentive changes for 2026.

Host: CLEAResult and Energy Trust staff, Processing Team



Energy Trust Speaker:

Michael Colgrove
Executive Director
Energy Trust of Oregon



Keynote Speaker:

Rob Del Mar
Senior Policy Analyst
Oregon Department of Energy



Residential Trade Ally Awards

Regions

Portland Forum

Bend Forum

Medford Forum

North Coast

Central

Southwest

Willamette Valley

Eastern

South Central

Portland-Salem Metro
Area

Columbia River
Gorge

Categories

Residential	Highest volume	Project count (all projects completed in 2024)
Residential	Greatest increase in project volume	Year over year comparison
Multifamily/ Commercial	Highest savings	Total kWh saved, total terms saved
Multifamily/ Commercial	Greatest increase in project volume	Year over year comparison
Solar	Highest battery attachment rate	Percentage of new installations that include battery storage
Solar	New Homes solar installer of the year	Most projects that had collaboration with Energy Trust's EPS New Homes program
Solar	Best verification, quality, customer service	Recipients selected by the account manager based on customer and quality assurance data
All programs	Exemplary new trade ally	Recent trade ally and actively engaged in program. Criteria include positive approach, cooperation, outstanding customer service, and project volume.

Residential Central

Highest Project Volume – Residential Central Area Project count (all projects completed in 2024)

Congratulations to GreenSavers USA Inc



Greatest Increase in Project Volume – Residential Central Area (2023 – 2024)

Congratulations to Central Oregon Heating & Cooling, Inc.



Exemplary New Trade Ally – Residential Central Area

Congratulations to All Year Heating and Cooling, LLC



Residential
Eastern

Highest Project Volume – Residential Eastern Area Project count (all projects completed in 2024)

Congratulations to Gordon's Heating & Cooling Inc



Greatest Increase in Project Volume – Residential Eastern Area (2023 – 2024)

Congratulations to Gordon's Heating & Cooling Inc



Exemplary New Trade Ally – Residential Eastern Area

Congratulations to Greater Purpose Heating and Cooling, LLC



Commercial Trade Ally Awards

Commercial/Multifamily Central

Highest Saving kWh – Commercial Central Area

Congratulations to Gale Contractor Services.



Highest Savings Therms – Commercial Central Area

Congratulations to Griffin Heating & Cooling



Greatest Increase in Project Volume – Commercial Central Area

Congratulations to GreenSavers USA Inc



Commercial/Multifamily Eastern

Highest Saving kWh – Commercial Eastern Area

Congratulations to Gordon's Heating & Cooling Inc



Highest Savings Therms – Commercial Eastern

Congratulations to Gordon's Heating & Cooling Inc



Greatest Increase in Project Volume – Commercial Eastern

Congratulations to Gordon's Heating & Cooling Inc



Exemplary new trade ally – Commercial Eastern

Congratulations to Valley Metal and Heating



Solar Trade Ally Awards

Solar
Central

Highest Battery Attachment Rate – Solar Central Area

Congratulations to E2 Solar LLC



Best Verification, Quality, and Customer Service – Solar Central Area

Congratulations to National Solar



Highest Commercial Volume – Solar Central Area

Congratulations to Sunlight Solar Energy, Inc.

