



Trade Ally Forums

Fall 2024



Thank you



Ciera Milkewicz
Sr. Program Consultant
Residential



Ashley Prentice
Trade Ally Network Specialist
Energy Trust



Tom Beverly
Sr. Customer Experience &
Trade Ally Specialist
Energy Trust



Heath Heiberg
Trade Ally Manager
Existing Buildings



Eric Falk
Field Manager
Residential



Agenda

8:00 – 8:30	Breakfast & Vendor Networking
8:30 – 8:40	Welcome and Introductions
8:40 – 9:00	Energy Trust Update
9:00 – 9:15	Trade Ally Awards
9:15 – 9:30	Break & Vendor Networking



Agenda (continued)

9:30 – 10:30

Breakout Session A (pick one)

Cascade CD	Deschutes South	Deschutes North
Existing Buildings, Multifamily, and Residential Program Updates (offered both sessions)	Incentive Application and Processing Workshop (offered both sessions)	Update on the Inflation Reduction Act Home Energy Rebates programs
<p>Speakers: Andrew Shepard, Heath Heiberg, Melissa Robson</p> <p>Andrew, Heath and Melissa will present information about incentive levels, program trends, and resources to support trade allies working with Existing Buildings, multifamily and Residential.</p>	<p>Speakers: Cameron Starr, Taylor Meyer, Andrea MacMurchy, Alex McCargar, Portia Eaton and Gabriela Esparza</p> <p>Join incentive processing and trade ally coordination staff to demystify incentive applications and processing. This workshop offers three pods to help with Residential, multifamily or Existing Buildings incentive applications and processing questions. Laptops and sample forms will be available. Highly recommended for any trade ally staff who fill out Energy Trust paperwork.</p>	<p>Speakers: Mark Wyman</p> <p>Learn more about Inflation Reduction Act Home Energy Rebates programs with representatives from Oregon Department of Energy and Energy Trust of Oregon.</p>

Agenda (continued)

10:45 – 11:45

Breakout session B (pick one – repeat of session A)

Cascade CD	Deschutes South	Deschutes North
Existing Buildings, Multifamily, and Residential Program Updates (offered both sessions)	Incentive Application and Processing Workshop (offered both sessions)	Weatherization's Impact on HVAC Performance
Speakers: Andrew Shepard, Heath Heiberg, Melissa Robson Andrew, Heath and Melissa will present information about incentive levels, program trends, and resources to support trade allies working with Existing Buildings, multifamily and Residential.	Speakers: Cameron Starr, Taylor Meyer, Andrea MacMurchy, Alex McCargar, Portia Eaton and Gabriela Esparza Join incentive processing and trade ally coordination staff to demystify incentive applications and processing. This workshop offers three pods to help with Residential, multifamily or Existing Buildings incentive applications and processing questions. Laptops and sample forms will be available. Highly recommended for any trade ally staff who fill out Energy Trust paperwork.	Speakers: Mark Jerome and Eli Caudill This presentation will explain how a home's insulation levels affect HVAC selection and performance. We will discuss the basics of heat transfer, examples of heat loss values in different assemblies, and how that can affect the selection and performance of HVAC equipment. Qualifies for CE credit.

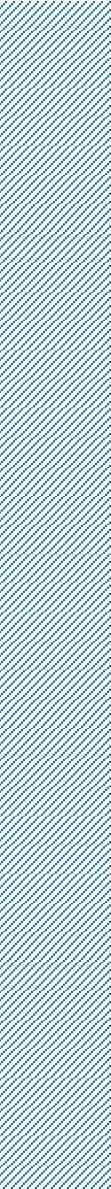
11:45 – 12:00

Raffle Drawing

Rinnai®



Nest Pro





Energy**Trust**
of Oregon

Introducing....

Joy Jerome Turtola

Workforce Development Manager

Customer Service & Support

Workforce Development

Fall 2024



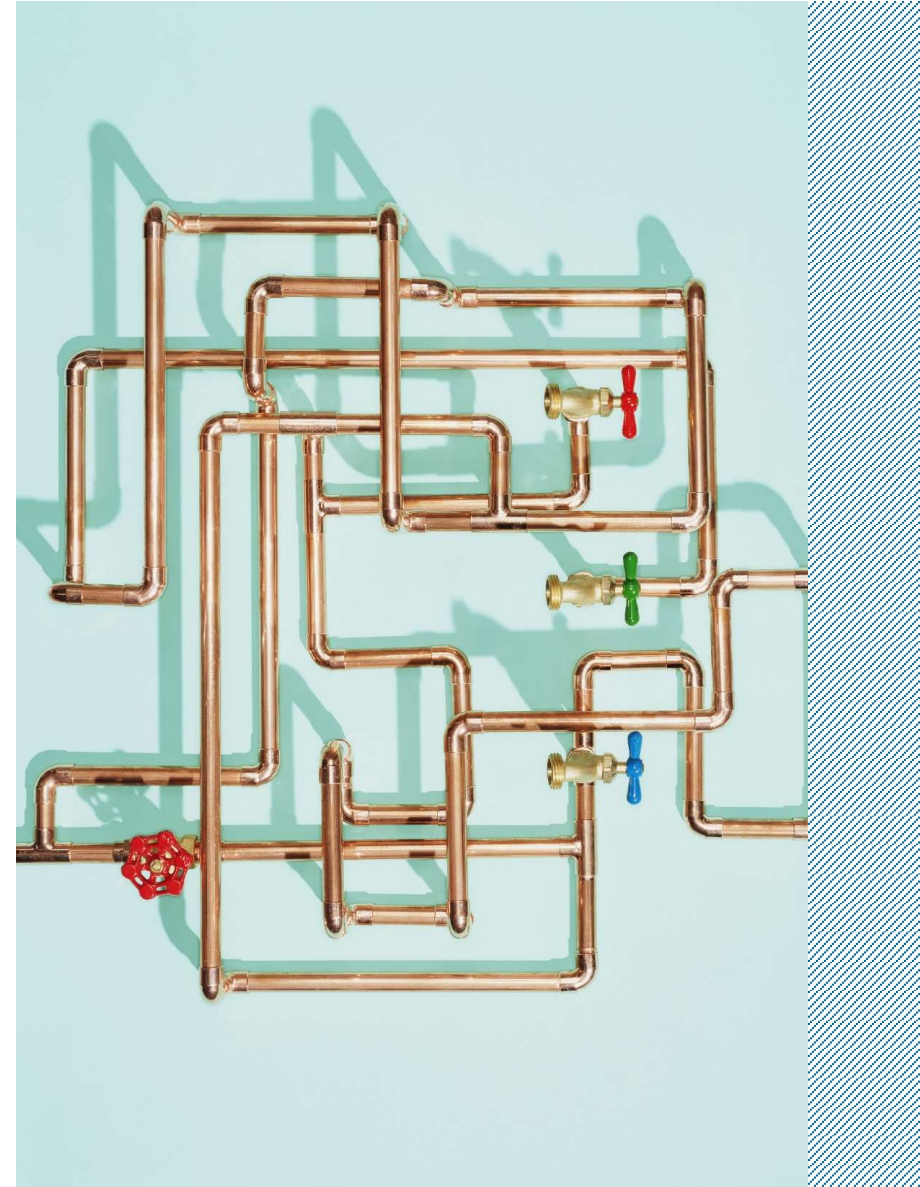
Workforce Development Manager



- 20 + years in workforce development and community colleges
- Experience with Workforce Investment Boards and federal funding (U.S. Dept. Of Labor)
- Skills in building programs for adults from first-generation, and immigrant/refugee communities, including pre-apprenticeship and career pathways

Workforce Development Manager

- Identify Trade Ally workforce gaps and develop strategies to fill them
- Cultivate partnerships with education and training providers who can create future Trade Allies
- Build partnerships with Workforce Investment Boards and community-based organizations



Slide 10

CS0 I recommend including a slide with a timeline of the WFD project with following components:

1. Identifying gaps
2. Assessing needs
3. Drafting strategy
4. Implementation

Cameron Starr, 2024-09-24T20:13:17.850



We need your support!

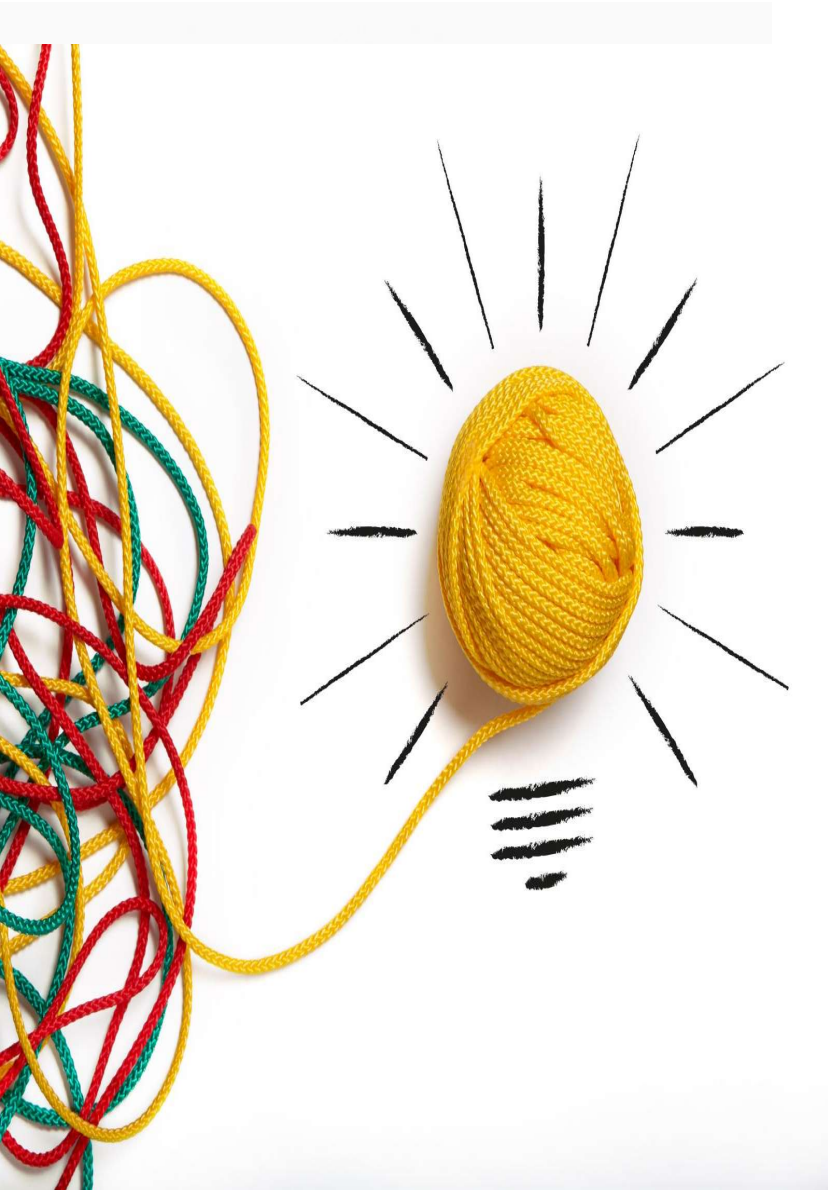
- How big are the challenges in workforce development?
- Where do we start?
- First step is to ASSESS
- *We would appreciate your expertise, local knowledge and wisdom*



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Next Steps...

- Synthesize what we have heard
- Prioritize and begin to take action on the ways you ask for Energy Trust Support

We appreciate your feedback

Contact Information:

Joy Turtola (he/him)

Workforce Development
Manager

joyjerome.turtola@energytrust.org

503-459-4062

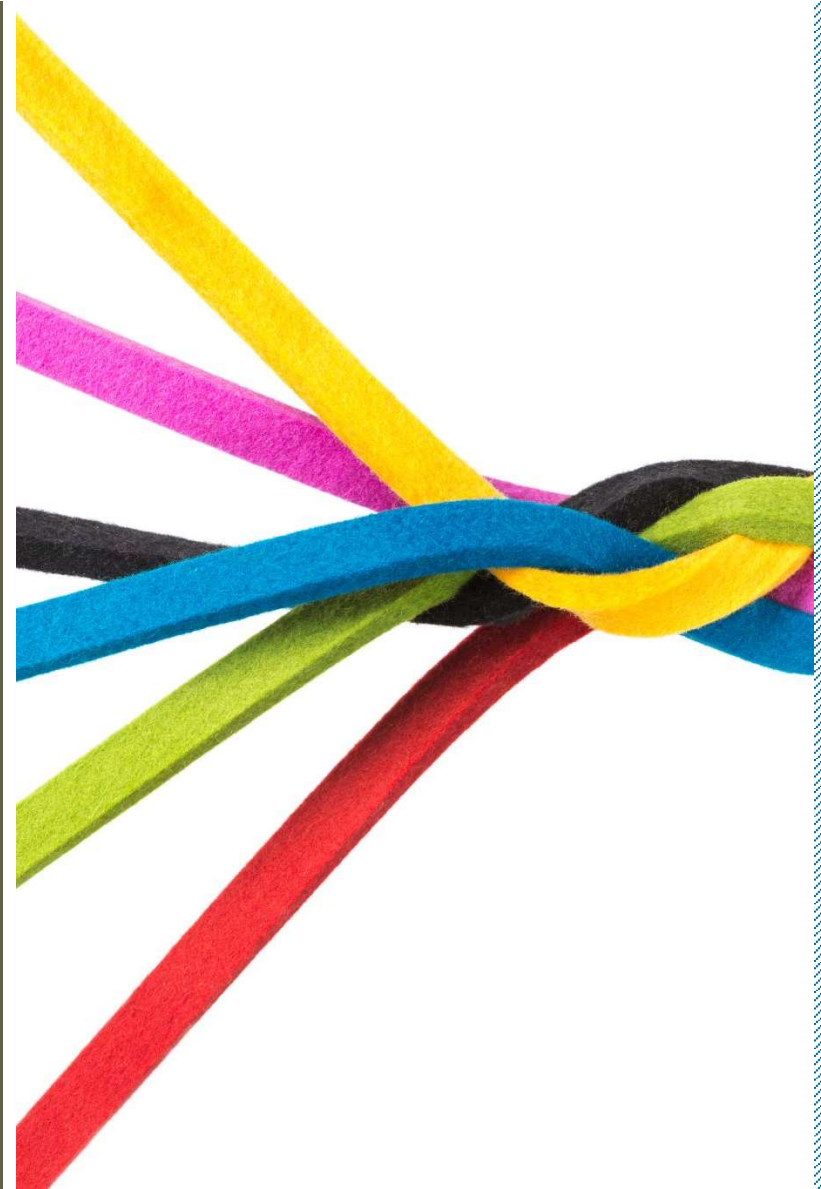




Photo: Ductless heat pump installation by PEAK Electric

Building for the Future

Michael Colgrove, Executive Director
October 21, 2024





A new approach to planning

- 2025-2030 Strategic Plan in final stages of development
- Shift to multiyear planning and budgeting starting next year
 - First multiyear budget will be developed in 2025, in effect from 2026-2030
- Timing aligned with state climate goals and utility decarbonization deadlines

The future we envision

- More extreme weather events due to climate change
- Greenhouse gas emissions reduction goals
- Increase of significant new funding for clean energy



Draft areas of focus through 2030

To maximize clean energy acquisition over the next six years, Energy Trust will focus on:

- Reducing the cost of decarbonization
- Creating greater impact for priority customers
- Motivating the next level of customer participation
- Supporting community resilience





Complementary funding

We expect incentives from new funding to be available for customers starting in 2026

Complementary funding can be leveraged to:

- Lower or remove upfront cost to serve priority customers more deeply
- Address housing repairs needed before installing energy upgrades

Work is needed to prepare the market before funding arrives

Photo: Grande Ronde tribal elder housing

Supporting your business

- Business development funds and training opportunities
- Expanding Contractor Development Pathway
- Contractor Mentorship Pathway and Small Business Resource network
- Begin launch of Community Partner Network





Michael Colgrove, Executive Director
Michael.Colgrove@energytrust.org

Residential Trade Ally Awards

Categories

- Greatest increase in project volume award
 - Weatherization
 - HVAC
 - Overall
- Exemplary new trade ally award
 - Voted on by account managers
- Community Partner Organizations Contractor Award
 - Participation with an enrolled Community Partner Funding organization. Most CPF projects in 2023
- Serving Small Businesses (commercial only)

Regions

- Central
- Northeast



Residential Central

Insulation Project Volume – Residential Central Oregon

Congratulations to GreenSavers USA Inc



HVAC Project Volume – Residential Central Oregon

Congratulations to GreenSavers USA Inc



Greatest Increase in Project Volume – Residential Central Oregon

Congratulations to Gale Contractor Services



Exemplary New Trade Ally - Residential Central Oregon

Congratulations to Ochoco Heating



Community Partner Organization Contractors - Residential Central Oregon

Congratulations to

Jefferson County Plumbing



Residential Eastern

Insulation Project Volume – Residential Eastern Oregon

Congratulations to Mr. Insulation



Mr. Insulation

HVAC Project Volume – Residential Eastern Oregon

Congratulations to Scotts Heating & Air Conditioning



Greatest Increase in Project Volume – Residential Eastern Oregon

Congratulations to All Air HVAC Service

≈ All Air ≈ HVAC Service

Exemplary New Trade Ally - Residential Eastern Oregon

Congratulations to ACES HVAC LLC



Community Partner Organization Contractors - Residential Eastern Oregon

Congratulations to Gordon's Heating and Cooling



Residential South Central

Insulation Project Volume – Residential South Central

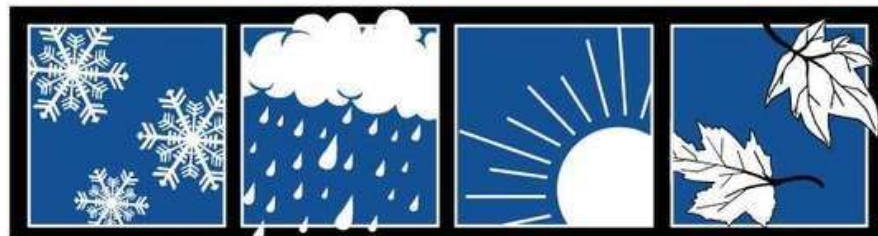
Congratulations to Win-R Insulation



HVAC Project Volume – Residential South Central

Congratulations to Seasons Change LLC

Seasons Change, LLC



Energy Solutions
Heating & Air Conditioning

Greatest Increase in Project Volume – Residential South Central

Congratulations to

United Mechanical



Exemplary New Trade Ally - Residential South Central

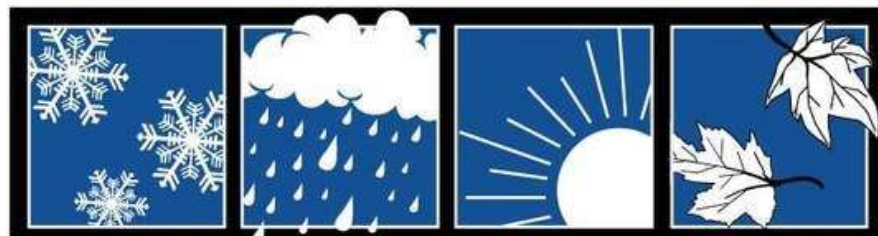
Congratulations to High Desert Electric



Community Partner Organization Contractors - Residential South Central

Congratulations to Seasons Change LLC

Seasons Change, LLC



Energy Solutions
Heating & Air Conditioning

Commercial Central

Insulation Project Volume – Commercial Central Oregon

Congratulations to Gale Contractor Services



HVAC Project Volume – Commercial Central Oregon

Congratulations to AccuAir



HVAC Project Volume – Commercial Central Oregon

Congratulations to GreenSavers USA Inc



HVAC Project Volume – Commercial Central Oregon

Congratulations to Mountain View Heating



Greatest Increase in Project Volume – Commercial Central Oregon

Congratulations to Mountain View Heating



Exemplary New Trade Ally – Commercial Central Oregon

Congratulations to AccuAir



Greatest Increase in Project Volume – Commercial Mt. Hood Ductless

Congratulations to Mt. Hood Ductless



Community Partner Organization Contractors - Commercial Central Oregon

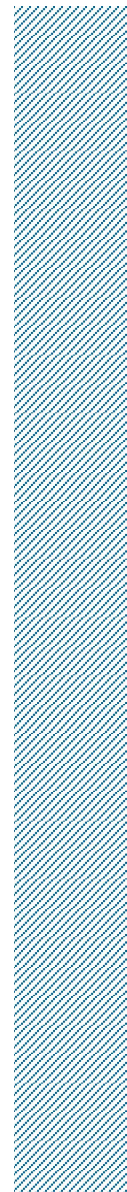
Congratulations to Performance Insulation & Energy Services



Community Partner Organization Contractors - Commercial Central Oregon

Congratulations to

Jefferson County Plumbing

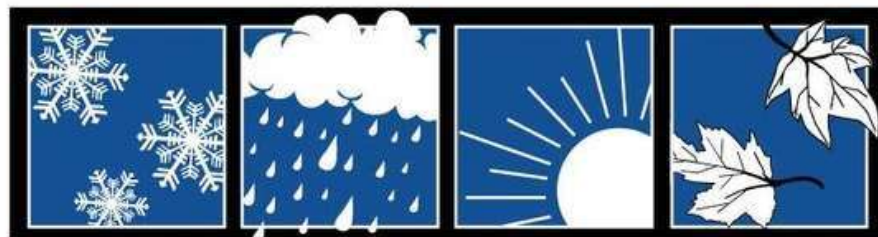


Commercial South Central

HVAC Project Volume – Commercial South Central

Congratulations to Seasons Change LLC

Seasons Change, LLC

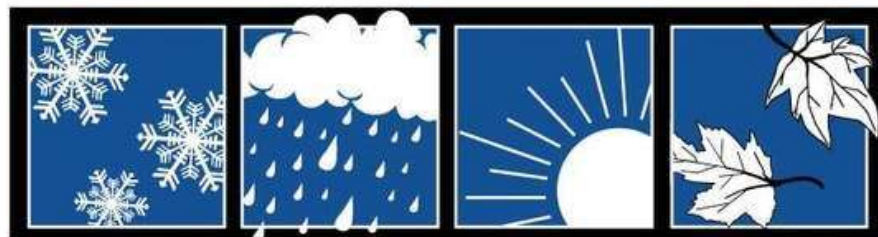


Energy Solutions
Heating & Air Conditioning

Greatest Increase in Project Volume – Commercial South Central

Congratulations to Seasons Change LLC

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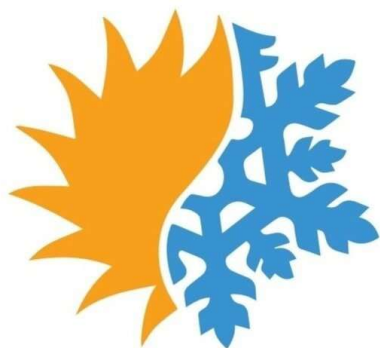


Energy Solutions
Heating & Air Conditioning

Commercial Eastern

Insulation Project Volume – Commercial Eastern Oregon

Congratulations to Mr. Insulation



Mr. Insulation

Greatest Increase in Project Volume – Commercial Eastern

Congratulations to Baker County Heating & Cooling

BAKER COUNTY
HEATING & COOLING_{LLC}

Greatest Increase in Project Volume – Commercial Eastern Oregon

Congratulations to Gordon's Heating & Cooling



Exemplary New Trade Ally – Commercial Eastern

Congratulations to Valley Metal & Heating



Community Partner Organization Contractor – Commercial Eastern

Congratulations to

The Stove Store



Community Partner Organization Contractor – Commercial Eastern

Congratulations to Scotts Heating & Air Conditioning



Residential Southwest

Insulation Project Volume – Residential Southwest

Congratulations to Grants Pass Insulation



HVAC Project Volume – Residential Southwest

Congratulations to

Medford Heating and Air Conditioning



Greatest Increase in Project Volume – Residential Southwest

Congratulations to Addcox Heating Center



Exemplary New Trade Ally – Residential Southwest

Congratulations to Umpqua Sheet Metal



Community Partner Organization Contractors - Residential Southwest

Congratulations to Energy Conservation Specialists



Commercial Southwest

Insulation Project Volume – Residential Southwest

Congratulations to Win-R Insulation



HVAC Project Volume – Residential Southwest

Congratulations to Rogue Valley Heating, Cooling & Electrical



Greatest Increase in Project Volume – Commercial Southwest

Congratulations to Energy Conservation Specialists



Exemplary New Trade Ally – Commercial Southwest

Congratulations to Lam-Air Heating & Air Conditioning



Exemplary New Trade Ally – Commercial Eastern

Congratulations to Valley Metal & Heating



Community Partner Organization Contractor – Commercial Eastern

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Community Partner Organization Contractor – Commercial Eastern

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