



Existing Homes Breakout Session
Q2 Roundtable
April, 2015





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Account Manager Introduction

Account manager introduction

Shawn Fredrickson

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Kevin Berg

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Account manager introduction

Brooke Ingram

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Account manager introduction

Mike Newcomb

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General inquiries (trade ally hotline)

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April 1 2015 Changes

April 1 star rating update

All active Existing Homes trade allies received a customized rating report earlier this month.

This star rating will remain active until October 1, when the ratings will be updated again.



EXISTING HOMES TRADE ALLY RATING

<COMPANY>

Energy Trust Existing Homes' trade ally star rating criteria is designed to better serve customers and trade allies. The rating criteria awards up to one star in each of three categories: program service, quality service and customer service. A description of the rating system is posted online at www.energytrust.org/trade-ally/programs/existing-homes/resources/.

Below is your new rating, effective April 1, 2015. If you have any questions about your rating, contact Existing Homes at 866.365.3526 or existinghomes@energytrust.org.

Star rating with new criteria: ★★ ★

Address	
Primary Region	

Program Service	April 1, 2014 – April 1, 2015
Applications Received	
Missing Information	
No Missing Information	
Does Not Qualify	
Total Program Service Score	

Quality Service (work quality verifications)	April 1, 2014 – April 1, 2015
Pass	
Minor	
Major	
Total Quality Service Score	

Customer Service	April 1, 2014 – April 1, 2015
Complaints	
Customer Service Star	

Total Energy Savings	April 1, 2014 – April 1, 2015
kWh	
Therms	

April 1 star rating update

Components:

- Quality Service Star – begin with 95 points

Pass = +2.5

Star = 100 or more

Minor = -2.5

Half star = 90-100

Major = -5

No Star = less than 90

- Program Service Star – begin with 95 points

Approved App = +2.5

Star = 100 or more

Missing Info = -2.5

Half star = 90-100

DNQ = -5

No Star = less than 90

- Customer Service Star – begin with full star

Star = 0-2 customer complaint cases

Half star = 3 customer complaint cases

No star = 4 or more customer complaint cases

Trade Ally Direct Install switch to LEDs

Trade Ally Direct Install allows trade allies to receive incentives for installing:

- LED lightbulbs
- Showerheads
- Faucet aerators

As of April 1:

- CFL bulbs are no longer eligible for incentives. Remaining CFL inventory may be returned to Ecotone for reimbursement.
- In response to trade ally feedback, TADI is **not currently required** for Existing Manufactured Homes no-cost service projects.

April 30 2015 Changes

April 30 incentive changes

Measures	2014 Incentive	2015 Incentive - Gas	2015 Incentive - Electric
Wall Insulation	\$0.30/sq ft	None	\$0.30/sq ft
Floor Insulation	\$0.30/sq ft	None	\$0.30/sq ft
Rim Joist Insulation	\$0.30/sq ft	None	\$0.30/sq ft
Duct Insulation	50% of cost, up to \$100	None	None
Whole-house Air Sealing	\$150	None	None

- These incentive changes affect Oregon homes only.
- Wall and floor insulation incentives will remain for electrically-heated homes.
- The air sealing incentive remains only for the Existing Manufactured Homes no-cost service.

April 30 – paper form changes

To make it easier for trade allies and customers to navigate forms, Existing Homes now has one universal form for Oregon incentives (**Form 320C**) that includes:

- Weatherization incentives
- Home heating incentives
- Water heating incentives

The 320C form will be available for download on May 1, 2015 at <http://energytrust.org/residential/find-a-form/>.

There will still be separate paper incentive forms for Savings Within Reach and Existing Manufactured Homes.

April 30 – Specifications Manual

The 2015 Existing Homes Specifications Manual will be released on May 1 2015. Each active trade ally will receive a printed copy of this manual.

Big changes to be aware of:

1. Passive Attic Ventilation requirements removed from Attic specifications, added to Best Practices section
2. CO Alarm(s) only required for Heat Pump Water Heaters when intake air comes from inside the home and is exhausted through ducting to exterior

General announcements

Gas furnace incentive options

Existing Homes now has two gas furnace incentives available in Oregon:

- \$500 instant incentive if installed in a single-family home rental property
- \$550 if installed for a Savings Within Reach qualifying customer

Trade Ally Portal

The Trade Ally Portal is an interactive website now available for all 2-star and higher trade allies. The Portal provides you with:

- A dashboard view of your projects submitted to Existing Homes
- Status tracking of incentive checks for you and your customers
- An energy-savings tracker displaying the kilowatt hours and therms your business has helped consumers save over time
- The ability to manage your company profile, as seen on the Find-A-Contractor search engine

Trade Ally Portal



DASHBOARD MY BUSINESS RESOURCES CONTACT US

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Dashboard

This table shows active and completed projects you have submitted and their processing status. Click on a site address for more detail about the project status. Paper applications submitted by fax, mail or email will appear on this page within 2 weeks of submission.

Search Start Date: End Date: Status:

Site	Owner	Started	Status
[REDACTED]	[REDACTED]	01/21/2015	NEWREQ
[REDACTED]	[REDACTED]	01/13/2015	PAY
[REDACTED]	[REDACTED]	01/13/2015	PAY
[REDACTED]	[REDACTED]	01/13/2015	PAY
[REDACTED]	[REDACTED]	01/13/2015	PAY
[REDACTED]	[REDACTED]	01/13/2015	PAY
[REDACTED]	[REDACTED]	01/05/2015	PAY
[REDACTED]	[REDACTED]	12/24/2014	NEWREQ
[REDACTED]	[REDACTED]	12/19/2014	MISSINFO
[REDACTED]	[REDACTED]	12/17/2014	PAY

Incentive Application Form

Apply for cash incentives on the installation of qualifying weatherization or heating and cooling projects.

[Apply Online](#)

Upcoming heat pump pilot

Existing Homes will soon launch a pilot project to install 100 ducted heat pumps with an HSPF of 7.8 to 8.5 in manufactured homes with an existing electric furnace.

The Insider newsletter will announce more details about this pilot. Any Existing Homes trade ally in the Portland/Salem metro area, southern Oregon or central Oregon may apply.

The pilot will begin in August 2015 and continue through the remainder of the heating season.

Upcoming orientations

The following upcoming orientations are live webinars:

- **Instant Incentives Enrollment Orientation:** Tuesday April 21, 9:00am-10:00am
- **Existing Homes Trade Ally Orientation Part 1:** Wednesday April 22, 9:00am-10:00am
- **Existing Homes Trade Ally Orientation Part 2 (Specifications):** Thursday April 23, 9:00am-11:00am

If you would like to enroll in an offering not listed here, please contact Existing Homes.



Thank You

Existing Homes

ExistingHomesTA@energytrust.org

Phone: 866.365.3526

