



**Community Partner Funding**  
**2024 Trade Ally Forum**





# Overview

- Introducing Community Partner Funding
- Featured Community Partners
- Working with Community Partners
- What does your process look like?

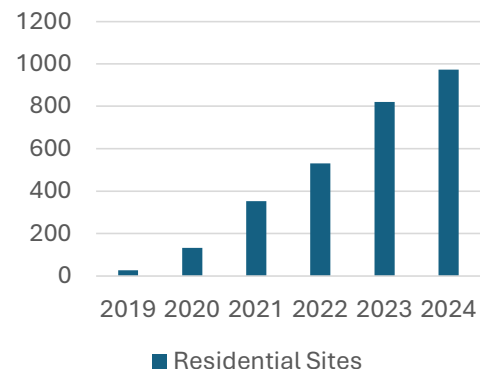
## Session Objectives:

- Networking & Collaboration
- Gather Insights
- Brainstorm Solutions

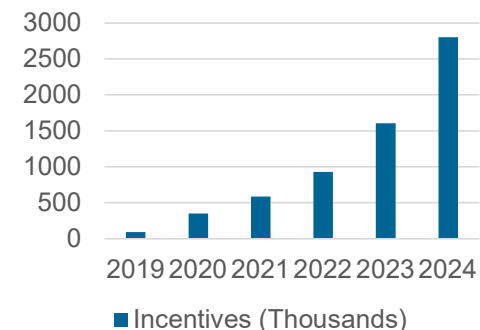
# Community Partner Funding

- Community Partner Funding are enhanced incentives to provide holistic retrofits for communities of color and people experiencing lower incomes.
- The goal of CPF is to offer support to communities who have not been prioritized with standard offers.
- What are we trying to accomplish today is collaboration between Community Partners and Trade Allies to best support these communities.

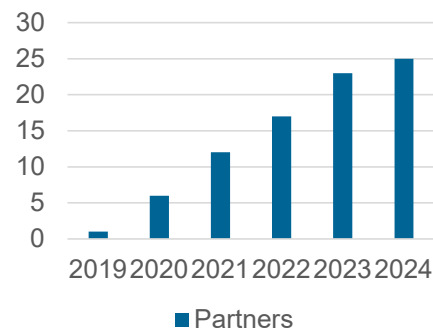
### Residential Sites



### Incentives (Thousands)



### Partners



### Contractors



# Our Featured Partners



Mission Statement: NeighborWorks Umpqua empowers our neighbors in need to pursue opportunities in housing, community, and finance.

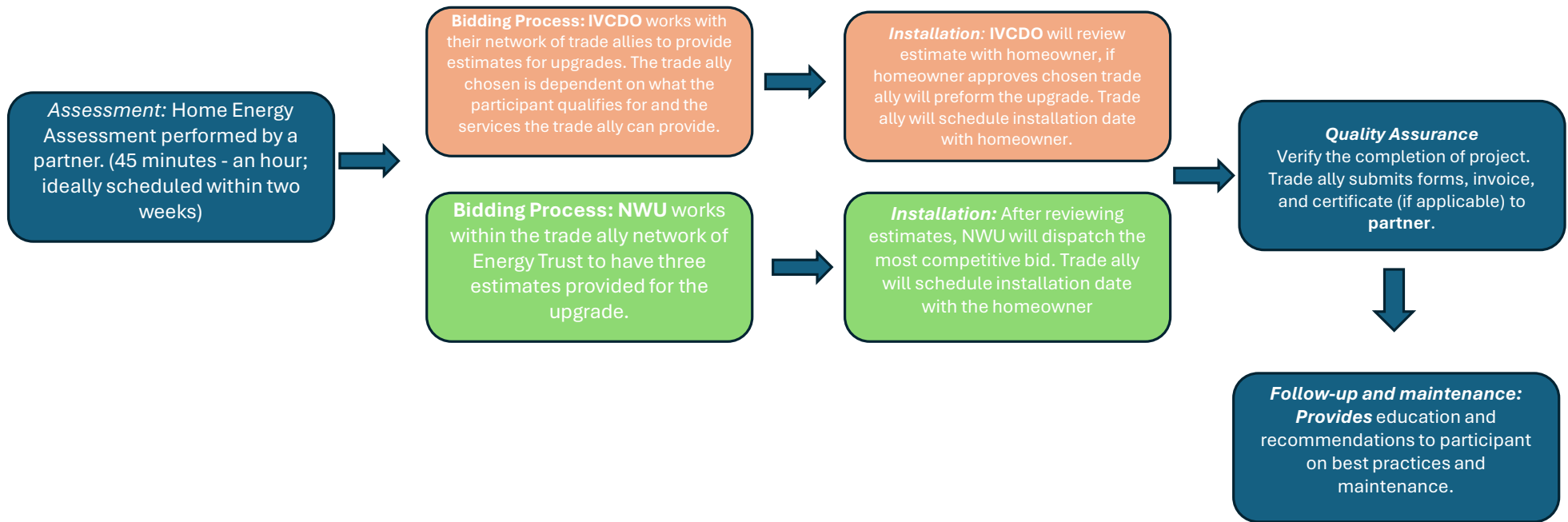
Service Territory: Douglas County, Curry County, and Coos County



Mission Statement: The Illinois Valley Community Development Organization is a 501(c)(3) non-profit committed to collaborative programs and inclusive partnerships that improve and change lives across communities of rural southwest Oregon. With a community based strategic plan focused on People, Place, and Prosperity, we champion sustainable development for vibrant economic, social, and cultural conditions.

Service Territory: Josephine County, Jackson County (in partnership with Rogue Climate)

# Working with Partners



# Trade Ally Involvement

## Bidding process

- What are the top factors that can drive up cost for you? How long does it take to provide an estimate?
- How do you ensure your estimate reflects current market prices?

## Installation

- What are steps you take to prepare the site for an upgrade?
- What measures do you take to ensure safety?
- Do you work with subcontractors to complete the installations?

## Quality Assurance

- How do you ensure the installation is done according to the highest quality standards?
- Do you offer any warranties or guarantees that cover the installation in additions to any manufacture warranties?
- Quality control checks or inspections do you perform during and after the installation?

## Follow up and maintenance

- Do you offer your cutometers an opportunity to purchase a maintenance plan? (HVAC)
- Do you provide any educational materials?

Introductions: Name, Company, Specialty, CPF involvement

# Groups Activity:

- **Group Discussion Questions:**

- **What Attracts:** What works well and what attracts you to the program?
  - What specific support has helped you succeed? What aspects of the program's structure are valuable?
- **What Detracts:** What are challenges or frustrations you have experienced?
  - What improvements would have made your experience easier?
- **What are Solutions:** What solutions could address identified challenges?
  - What additional resources are needed? What process improvements are necessary?

# QA: Session

- Guiding question:
- Funding
- Programs
- Needs from contractors working w/ partners



## Working with Partners

*Assessment:* Home Energy Assessment performed by a partner. (45 minutes - an hour; ideally scheduled within two weeks)

*Bidding Process:* **IVCDO** will pull from network of trade allies to send them out to complete an estimate.

**NWU** requires 3 estimates for each job.

*Installation:* IVCDO will

*Quality Assurance:* Verify that the upgrade is up to Energy Trust specification manual and in compliance with local code. (1 day)

*Follow-up and maintenance:* Provide resources and education to customer so they understand routine maintenance and other recommendations that will maximize energy savings and extend the life of the produce. (1 day)



# Working with Partners



*Assessment:* Home Energy Assessment will be performed by Community Partner

IKO



*Scope Definition:* During the Home Energy Assessment, Partner will identify qualifying upgrades and start identifying contractors that are available to provide an estimate



*Bidding Process:* Participating trade ally will provide an estimate to the community partner and homeowner.



*Installation:* Participating trade ally to complete upgrade of eligible scope



*Quality Assurance:* Verify that the upgrade is up to Energy Trust guidelines and in compliance with local code



*Follow-up and Maintenance:* Provide resources and education to customers so they understand routine maintenance and other recommendation that will maximize energy savings and extend the life of the product.



## Slide 10

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**IKO** Perhaps, we can modify this graphic to have it represent a timeline or time-dependent process. Seeing this as a roadmap could be helpful.

Isaiah Kamrar, 2024-10-14T17:41:03.485

**JB1** How each program interacts with this silde

Jimmy Balderas, 2024-10-17T21:47:41.358

# Introductions



# Working with Partners



*Assessment:* Home Energy Assessment performed by a partner. (45 minutes - an hour; ideally scheduled within two weeks)

*Bidding Process:* **IVCDO** works with their network of trade allies to provide estimates for upgrades. The trade ally chosen is dependent on what the participant qualifies for and the services the trade ally can provide.

*Installation:* **IVCDO** will review estimate with homeowner, if homeowner approves chosen trade ally will perform the upgrade. Trade ally will schedule installation date with homeowner.

*Quality Assurance:* Verify the completion of project. Trade ally submits forms, invoice, and certificate (if applicable) to **IVCDO**.

*Follow-up and maintenance:* **IVCDO** sends peak summertime reminders to past participants to maintain best practices, clean the filters, or checking the outside unit is clear of dust and debris.



*Assessment:* Home Energy Assessment performed by a partner. (45 minutes - an hour; ideally scheduled within two weeks)

*Bidding Process:* **NWU** works within the trade ally network of Energy Trust to have three estimates provided for the upgrade.

*Installation:* After reviewing estimates, **NWU** will dispatch the most competitive bid. Trade ally will schedule installation date with the homeowner

*Quality Assurance:* : Verify the completion of project. Trade ally submits forms, invoice, and certificate (if applicable) to **NWU**.

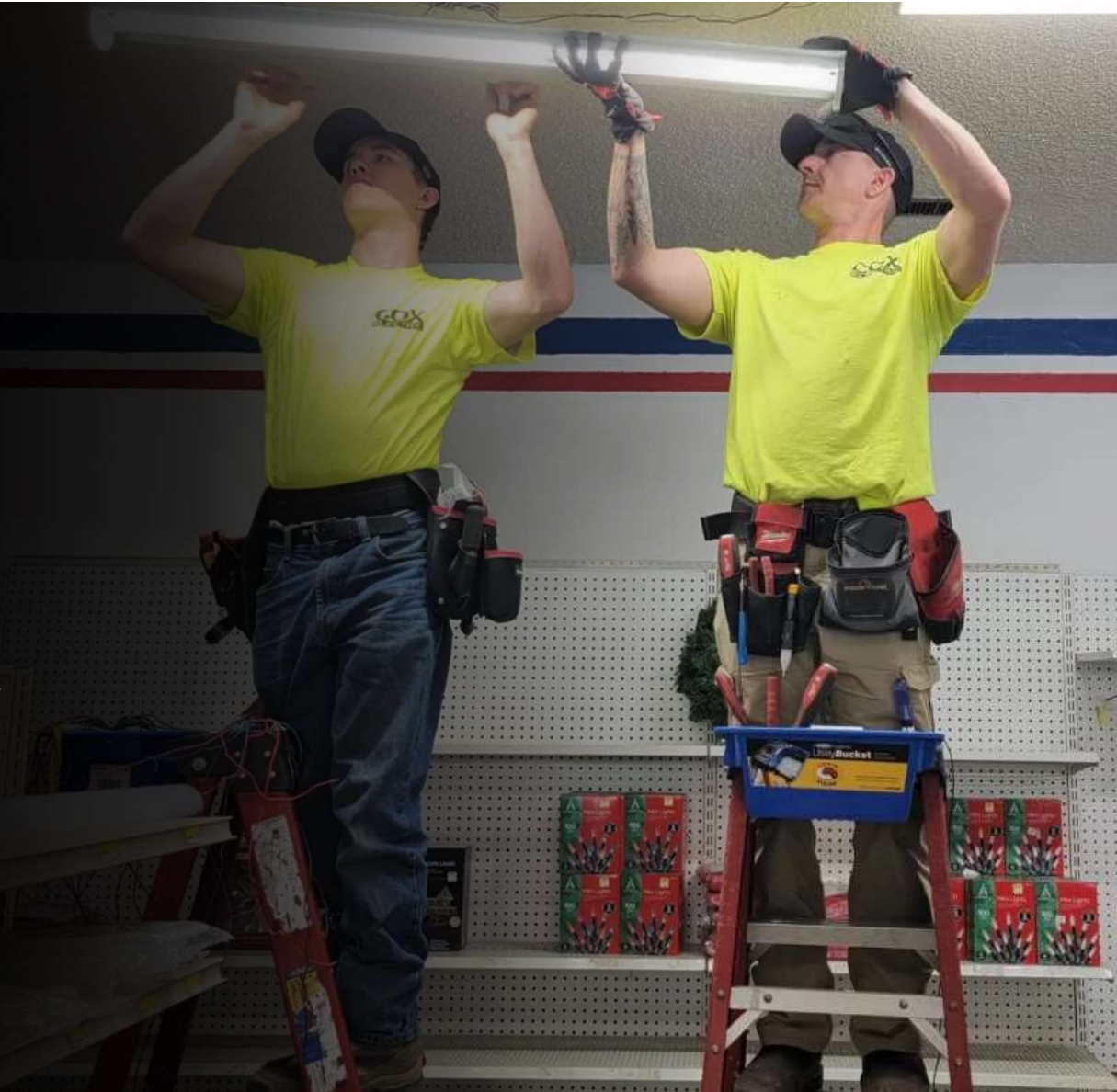
*Follow-up and maintenance:* **NWU** takes every opportunity throughout the process to educate participant on best practices and recommendations.



Illinois Valley Community Development Organization

**Mission:** The Illinois Valley Community Development Organization is a 501(c)(3) non-profit committed to collaborative programs and inclusive partnerships that improve and change lives across communities of rural southwest Oregon. With a community based strategic plan focused on People, Place, and Prosperity, we champion sustainable development for vibrant economic, social, and cultural conditions.

- **Infrastructure & Energy Program:** Provides opportunities for both small businesses and homes in our area to access energy efficiency incentives. IVCANDO helps by providing project management for select programs including residential heating efficiency upgrade incentives and small business energy efficiency upgrade incentives for LED lighting and security system packages.
- Commitment to serving the rural communities
- Assisting residents of the Illinois Valley to save on their energy bill.
- Offers free home energy assessments for qualifying customers of Pacific Power and Avista, with the potential to receive incentives for energy efficient upgrades.





# Community Partner Funding

- Program within Energy Trust of Oregon partners with local community based organization to empower communities to weatherize their homes
- Collaborate with organizations to help the following customers lower their energy bills:
  - Communities of color
  - Customers experiencing low-to-moderate incomes (LMI)
  - Indigenous communities
  - Rural customers
  - Customers experiencing disabilities
- Understand and support organization goals and client needs
- Integrate additional funding for energy efficiency upgrades to serve their communities



# NeighborWorks®

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## UMPQUA

**Mission:** NeighborWorks Umpqua empowers our neighbors in need to pursue opportunities in housing, community, and finance.

- **Energy Savings Program:** Provides Free or Low-Cost Home Energy Upgrades.
- Performs a Home Energy Assessment to educate a homeowner how best to save energy and recommend energy upgrades.
- Will provide clients with a list of participating contractors and will meet with contractors at your home to get a project estimate.
- NeighborWorks Umpqua will act as a support system to their clients as the contractor(s) install energy upgrades.
- NeighborWorks Umpqua will work with their network of contractor(s) to apply Energy Trust discounts and other funding to provide upgrades at low-to-no cost to their participants.



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## Our Featured Partners



Service Territory: Douglas County & Coos County



Service Territory: Curry County , Josephine County, Jackson County

## Tips to Expedite the Process for Customers, Partners and Contractors

- Example 1: Show up to an assessment with a contractor
  - Two pairs of eyes are better than one.
  - When a partner has an idea of what measures they would like to pursue. Having a contractor join the assessment can help the customer get the most education out of an assessment.
  - Help reduce the amount of meeting the customer will need to schedule.
  - Provide faster turn around on estimates to support partners in navigating the funding they have available to them

## Tips to Expedite the Process for Customers, Partners and Contractors

- Example 2: Collaborate on Paperwork
  - Community Partners can help support trade allies by pre-filling out the project details form (provided all information needed is on the estimate) for faster submission of payment
  - Helping contractors navigate incentives available by Energy Trust to maximize the funding per project
  - Or dividing and conquering: Partners help start the process by submitting the initial form for the assessment. Trade Allies support in making sure the final form is filled out and submitted to collect payment