

**Medford Trade Ally Forum
October 16, 2025**

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- 8:00 – 8:30** **Breakfast with Account Managers, vendor networking**
- 8:30 – 8:50** **Welcome and Updates from Energy Trust’s Natalie Hatheway, Assistant Director, Energy & Efficiency**
- 8:50 – 9:20** **Keynote Presentation, Sarah Moehrke, Community Navigator, Oregon Dept. of Energy**
Oregon is in the midst of an energy transition – one that will need to balance clean energy goals with equity, affordability, reliability, and resilience. Thanks to guidance and input from energy partners, communities, and the public, the Oregon Department of Energy is finalizing a new state energy strategy that will identify potential pathways for reaching Oregon’s energy policy objectives. Each Oregonian will be part of the transition, including efforts to advance energy efficiency, increase electrification, invest in clean electricity, advance the use of low-carbon fuels, and strengthen energy resilience across communities.
- 9:20 – 9:40** **Trade Ally Awards**
- 9:40 – 10:00** **Break & Vendor Networking**
- 10:00 – 11:00** **Breakout Session A (select one)**

Ballroom 1	Ballroom 2	Table Rock Room
<p>Topic: IRA Programs Update for Trade Allies</p> <p><i>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.</i></p>	<p>Topic: Identifying Small & Large Multifamily Differences</p> <p><i>This presentation will define the differences between small and large multifamily projects, and program sorting updates. We’ll discuss key offerings in HVAC, windows, weatherization, and how incentives vary with property size. This session is a must for anyone looking to for maximize project value and understand incentive differences.</i></p>	<p>Topic: Solar Program updates</p> <p><i>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.</i></p>
Speakers: Scott Leonard, Energy Trust	Speaker: Jeff Boyer, TRC	Speaker: Lori Lull, Shannon Wall, Kyle Holmes, Nikita Chan

11:00 – 11:15 **Break & Vendor Networking**

11:15 – 12:15

Breakout Session B (select one)

Ballroom 1	Ballroom 2	Table Rock room
<p>Topic: IRA Programs Update for Community Based Organizations</p> <p><i>Do you represent a Community Based Organization (CBO) and want to learn about how IRA programs can support your community? This is a CBO-only session for CBO staff to learn about CBO participation in the HOMES & HEAR programs.</i></p>	<p>Topic: Residential and Multifamily 2025 Program Updates</p> <p><i>Energy Trust will present information about program trends and resources to support trade allies working with Existing Buildings, Multifamily and Residential.</i></p>	<p>Topic: Solar Program updates (continued)</p> <p><i>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.</i></p>
Speaker: Scott Leonard, Energy Trust	Speaker: Isaiah Kamrar, Energy Trust	Speaker: Lori Lull, Shannon Wall, Kyle Holmes, Nikita Chan

12:15 – 12:30

Raffle

12:30 – 1:30

Lunch (pre-registration required)

Join us for a roundtable lunch session where southern Oregon Community Based Organizations will cover what they've been learning in doing Home Energy Assessments and contracting to deliver Energy Trust's deepest level of incentives, the Community Partner Funding program. Contractors may join in the conversation on this unique delivery of Energy Trust incentives. The session will be led by Joy Lark of Illinois Valley Community Development Organization (serving Josephine) and includes Neighborworks Umpqua (serving Douglas, Coos, and Curry Counties), and Lake County Resource Initiation (serving Lake and Klamath Counties), as well as Energy Trust's pilot program In-Home Energy Services (in Jackson county).

1:30 – 2:30

Afternoon Sessions

Ballroom 1	Ballroom 2
<p>Topic: Contractor Connections for HOMES/HEAR (meeting and connecting for project partners)</p>	<p>Topic: Question and Answer on Incentive Changes</p>
Host: Scott Leonard, Energy Trust	Host: CLEAResult and Energy Trust staff, Processing Team

Scan Code for Session Handouts



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