



# 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

<b>8:00 – 8:30</b>	<b>Breakfast &amp; Vendor Networking</b>
<b>8:30 – 8:40</b>	<b>Welcome and Introductions</b>
<b>8:40 – 9:00</b>	<b>Energy Trust Update</b>
<b>9:00 – 9:15</b>	<b>Trade Ally Awards</b>
<b>9:15 – 9:30</b>	<b>Break &amp; Vendor Networking</b>



# Agenda (continued)

**9:30 – 10:30**

## **Breakout Session A (pick one)**

<b>Ballroom 1</b>	<b>Ballroom 2</b>	<b>Ballroom 3</b>
Existing Buildings, Multifamily, and Residential Program Updates (offered both sessions)	Update on the Inflation Reduction Act Home Energy Rebates programs	Incentive Application and Processing Workshop
<p>Speakers: Heath Heiberg, - Isaiah Kamrar, Savannah Lee</p> <p>Heath, Isaiah and Savannah will present information about incentive levels, program trends, and resources to support trade allies working with Existing Buildings, multifamily and Residential.</p>	<p>Speakers: Mark Wyman</p> <p>Learn more about Inflation Reduction Act Home Energy Rebates programs.</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>

# Agenda (continued)

**10:45 – 11:45**

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

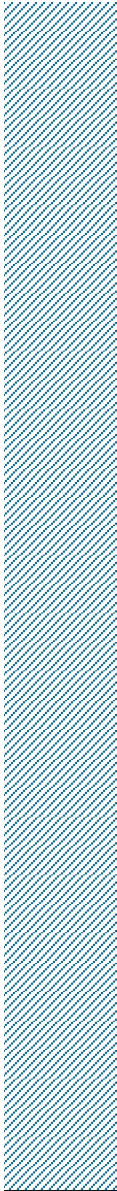
Ballroom 1	Ballroom 2	Ballroom 3
Existing Buildings, Multifamily, and Residential Program Updates (offered both sessions)	Weatherization's Impact on HVAC Performance	Trade Ally and CBO Partnerships
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**11:45 – 12:00**

**Raffle Drawing**



Nest Pro





***Introducing....***

***Joy Jerome Turtola***

***Workforce Development Manager***

***Customer Service & Support***

Workforce Development

Fall 2024





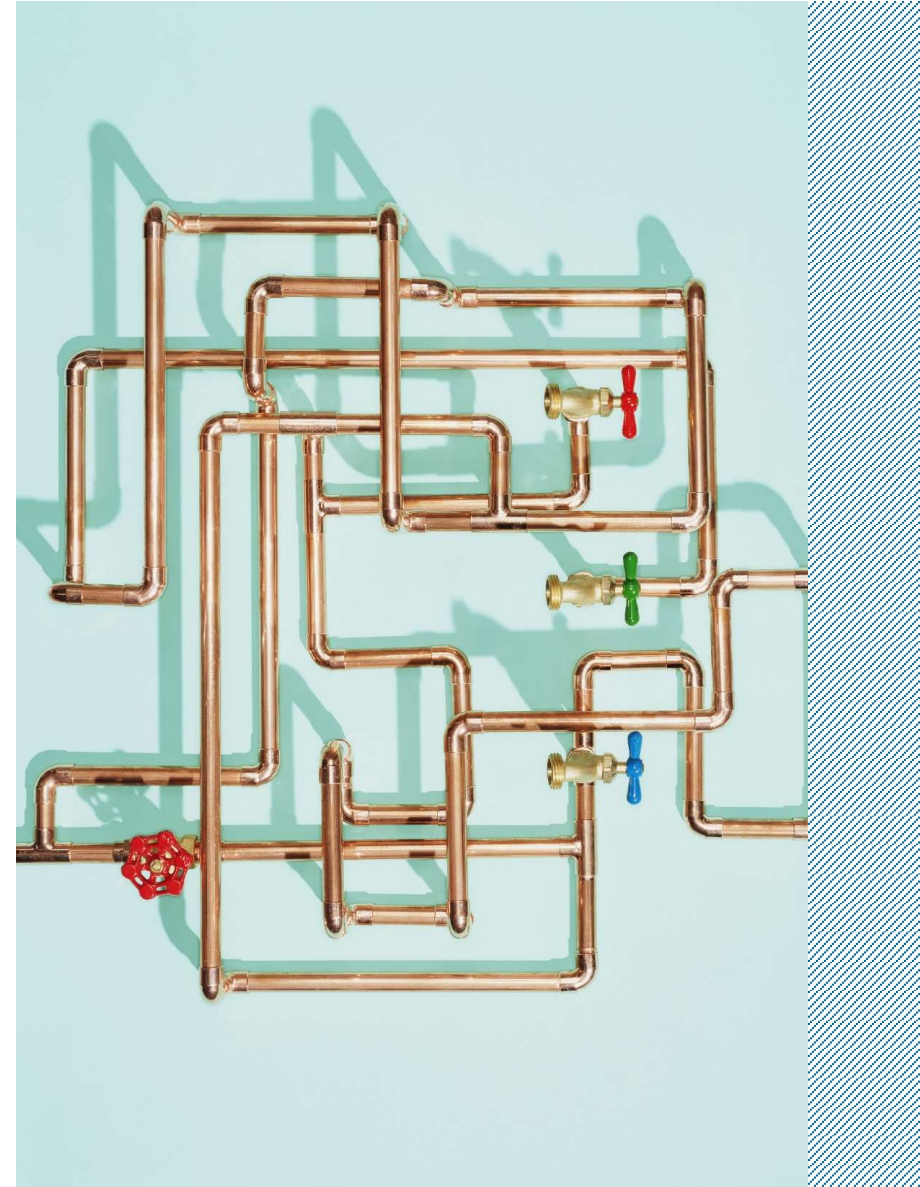
## Workforce Development Manager



- 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

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**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!

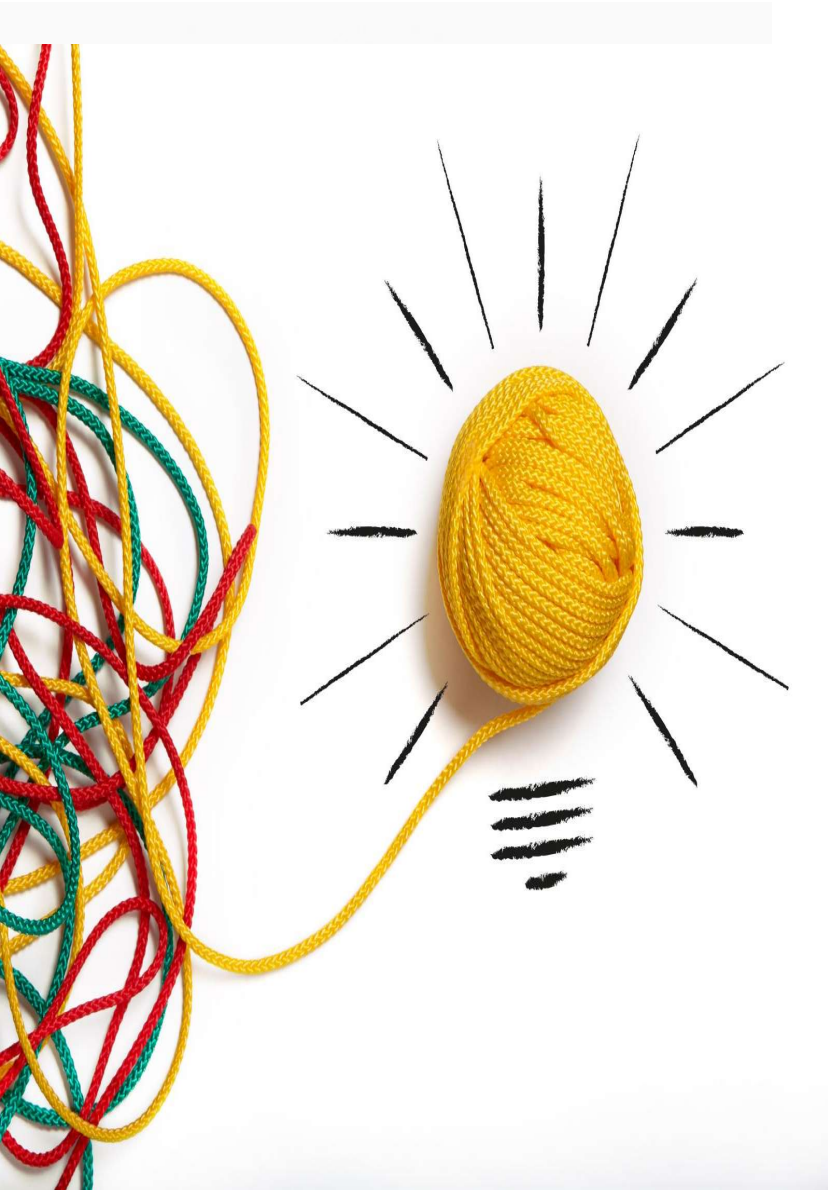
- How big are the challenges in workforce development?
- Where do we start?
- First step is to ASSESS
- *We would appreciate your expertise, local knowledge and wisdom*



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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***

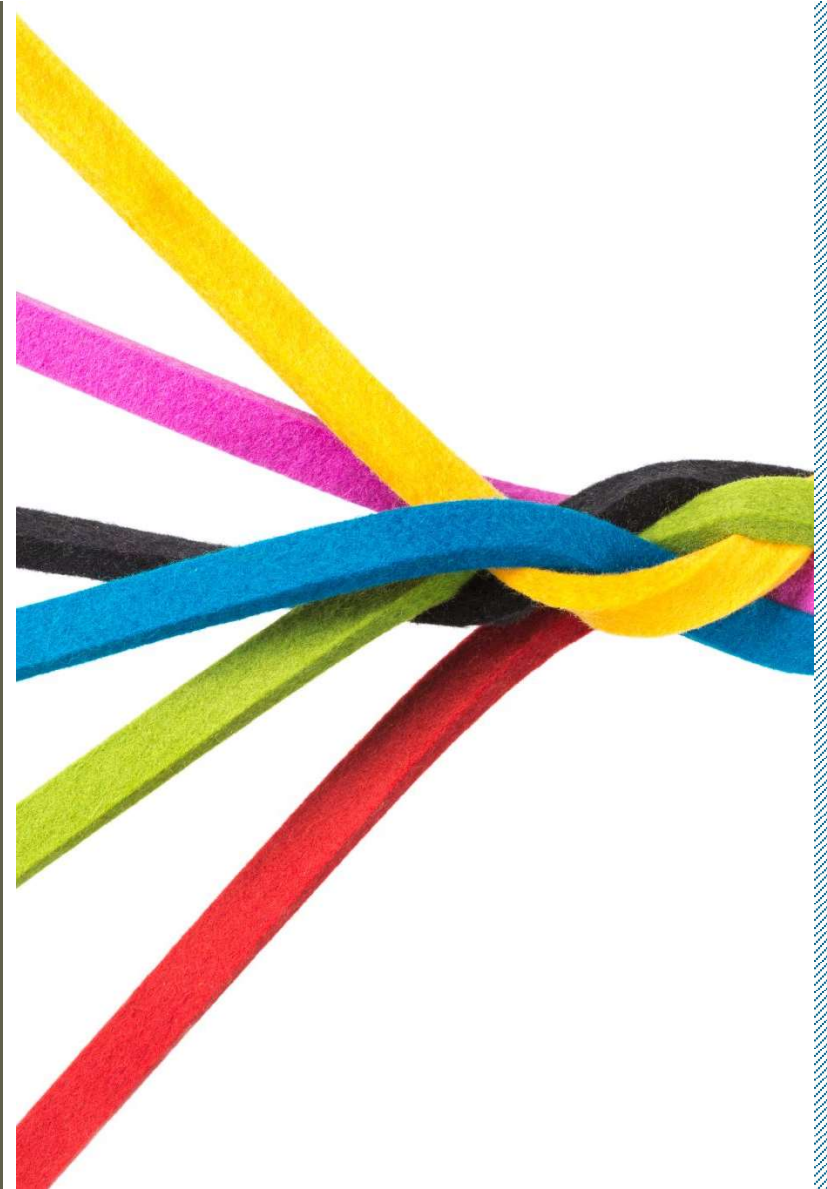
## Contact Information:

Joy Turtola (he/him)

Workforce Development  
Manager

[joyjerome.turtola@energytrust.org](mailto:joyjerome.turtola@energytrust.org)

503-459-4062





*Photo: Ductless heat pump installation by PEAK Electric*

## Building for the Future

Michael Colgrove, Executive Director  
October 22, 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](mailto:Michael.Colgrove@energytrust.org)

# 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

- Southwest
- South Central



# 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 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



# Residential South Central

# Insulation Project Volume – Residential South Central

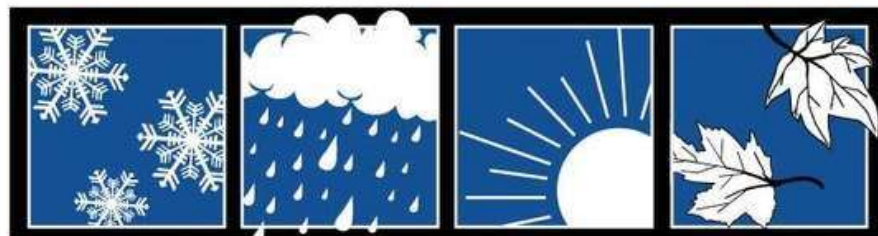
Congratulations to Win-R Insulation



# 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

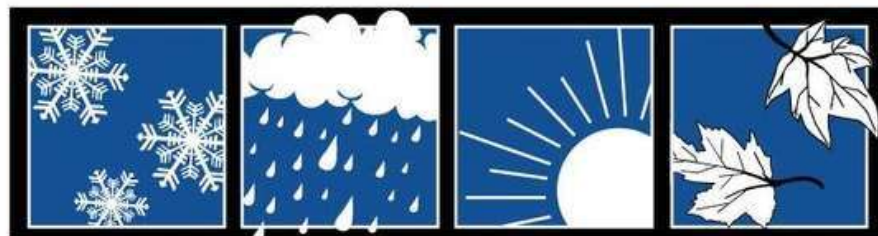




# Community Partner Organization Contractors - Residential South Central

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

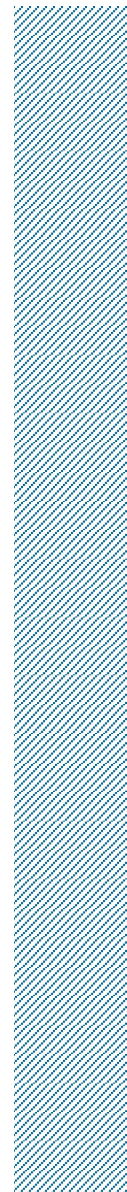
Congratulations to Performance Insulation & Energy Services



# Community Partner Organization Contractors - Commercial Central Oregon

Congratulations to

Jefferson County Plumbing

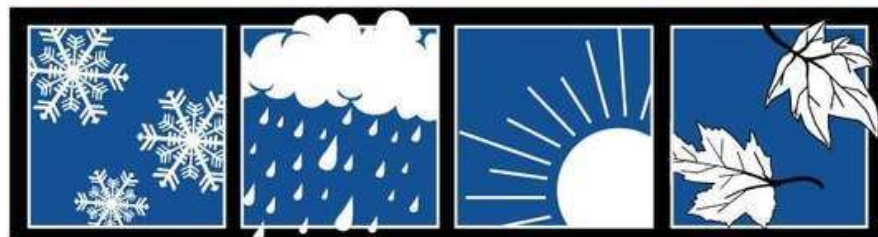


# Commercial South Central

# HVAC Project Volume – Commercial South Central

Congratulations to Seasons Change LLC

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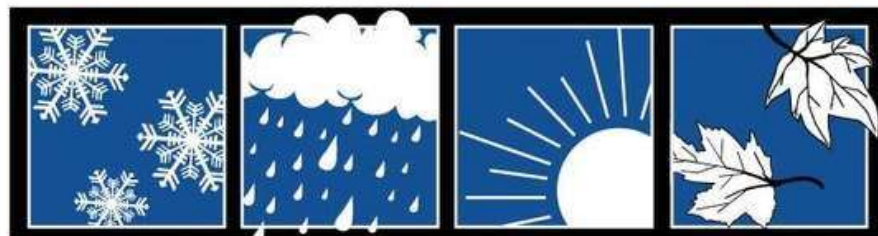


**Energy Solutions**  
**Heating & Air Conditioning**

# Greatest Increase in Project Volume – Commercial South Central

Congratulations to Seasons Change LLC

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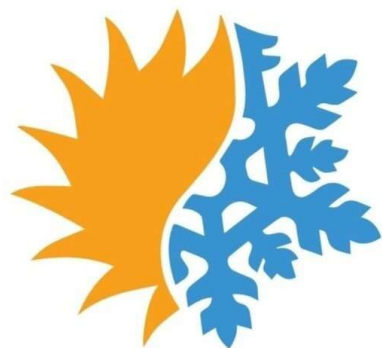


**Energy Solutions**  
**Heating & Air Conditioning**

# 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**<sub>LLC</sub>

## 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



# Commercial Southwest

# Insulation Project Volume – Commercial Southwest

Congratulations to Win-R Insulation



# HVAC Project Volume – Commercial 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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