



Community Partner & Trade Ally Partnerships Breakout Session
2024 Trade Ally Forum





Strengthening Trade Ally & CBO Partnerships

Agenda:

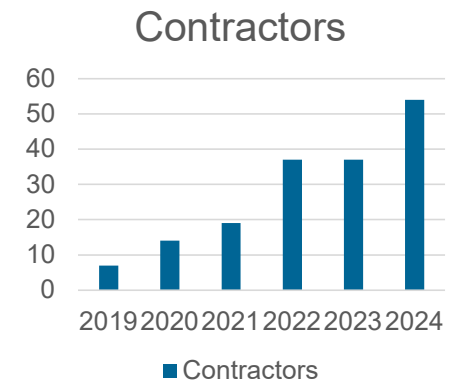
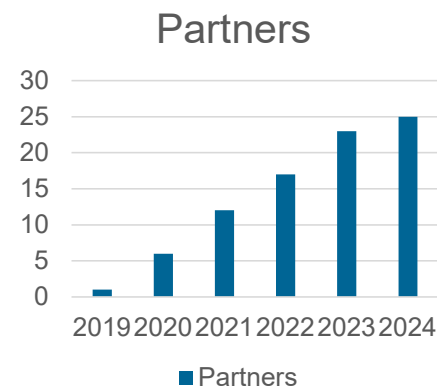
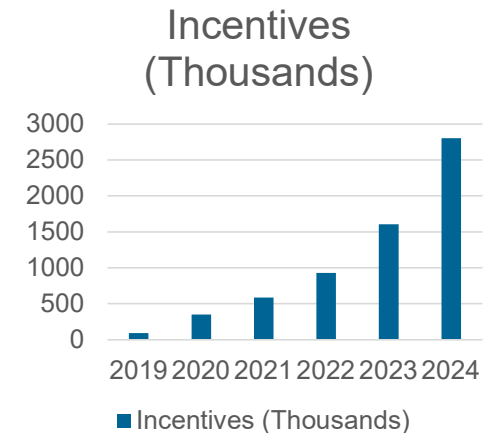
- Overview: Community Partner Funding
- Introductions
- Working with Community Partners
- Trade Allies Impacts
- Group Activity

Session Objectives:

- Facilitate Introductions & Collaboration
- Gather Insights
- Brainstorm Solutions

Workshop: 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.



Introductions

Our Community Partners



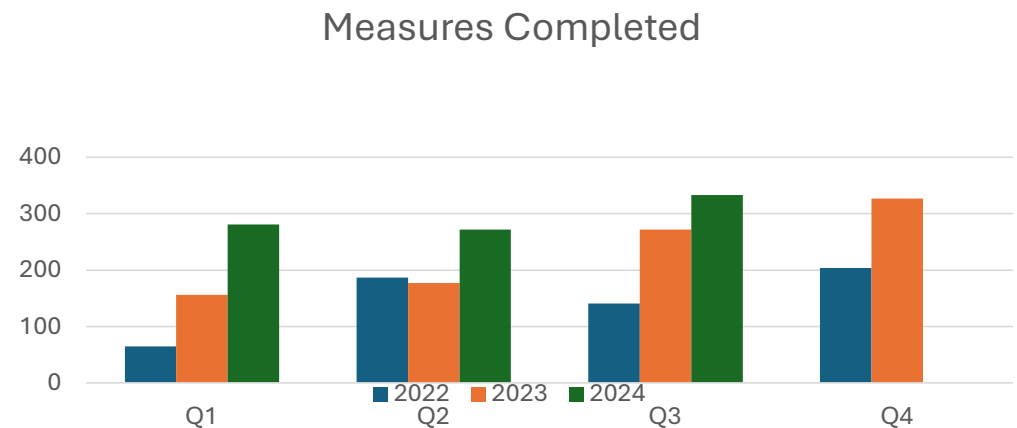
CPF Partners: Name, Org, Mission, 2025 Goals, 1 Key Operational Gap

Trade Allies: Name, Company, # Reps Present, Specialty, CPF involvement (# of years)

Community Partner Funding

- Program within Energy Trust of Oregon partners with local community based organization to empower communities to weatherize their homes

Community Partner Funding	2022	2023	2024 (YTD)
CBO Incentives Paid	\$552,733	\$1,571,982	\$2,615,186
Customers Served	525	797	906
Home energy assessments	458	697	699
HVAC projects	159	227	264
Weatherization projects	109	152	326
Total community Partners	16	22	25



Trade Ally Interactions in the Process

Working with Partners

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

Scope Definition: During the Home Energy Assessment, partner will identify qualifying upgrades. Will then start to identify trade allies available to provide estimates. (schedule contractor estimate 1-2 weeks)

Bidding Process: Participating trade ally or trade allies scheduled to provide an estimate to community partner and homeowner. (1-5 days)

Installation: Participating trade ally or trade allies to complete upgrade of eligible scope. (one- two days to complete)

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)



Where do Trade Allies have the biggest opportunity for impact?

Bidding process

- Provide the best recommendation that will maximize comfort and energy savings.
- Coordinate with Community Partner to reduce number of visits to the home of your customer.

Installation

- Opportunity to educate the customer on best practices and maintenance. Leave your contact information so customer can reach out for future maintenance or to set up a maintenance plan. Community Partners have access to educational Energy Trust flyers that can be left with the customer.

Quality Assurance

- Understanding what products are eligible for Energy Trust incentives. Making sure the installation is compliant with local code.

Follow up and maintenance

- Make sure the customer is using those best practices and provide advice on habit changes

Instructions with Activity Questions

- **Objectives:** Brainstorm Solutions to increase coordination
- **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?
- **Instructions:** Discuss the Group Questions for 15 minutes, placing sticky notes in the corresponding areas
 - Pink for CBOs
 - Green for Trade Allies
- **Materials:** Poster Board, Sticky Notes, Follow-Up Cards, Workshop 1-Pager
- **Next:** One Group Member Shares 1-2 Key Insights on Their Board

Activity #2: Vote on Key Challenges/Solutions

- **Instructions:**

1. Take the remainder of the session to vote on concepts/topics that resonate with your work
2. Discuss examples or other solutions with partners and TAs in the room
3. Add additional recommendations/notes on the poster with sticky notes
4. Complete the Individual Survey by Scanning the QR Code

- **Voting Stickers:**

- **Blue:** Resonates strongly (Top vote)
- **Green:** Interesting ideas
- **Yellow:** Concerns or reservations

THANK YOU

→ **Follow-Up:** Fill out our Survey or Worksheet to stay updated on an Insight Report

Partner-to-Partner Collaboration: AAAH and Verde



Client: Rosa

- Rosa was a retiree living in a Retirement community (condo)
- AAAH had completed a heat pump water heater installation and had a nonfunctioning ductless heat pump
- AAAH reached out to Verde's Ductless Heat Pump Activator program to discuss possible solution.
- With Energy Trust of Oregon incentives, AAAH and Verde were able to replace her non-functioning heat pump.
- AAAH and Verde were able to use their Portland Clean Energy Fund Funding to help cover the cost remaining after Energy Trust incentives.
- Energy Trust provided a \$1,850 towards a \$5,000 installation. Verde covered \$2000 and AAAH covered the remaining cost.

Maximizing the processing for Community Partners

- Example 1: Showing 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

Maximizing the processing for Trade Allies

- Example 2: Collaborating 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 processing 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