

**Portland Trade Ally Forum**  
**October 14, 2026**

|                      |                                                                                         |
|----------------------|-----------------------------------------------------------------------------------------|
| <b>8:00 – 8:30</b>   | <b>Breakfast with Account Managers, vendor networking</b>                               |
| <b>8:30 – 8:45</b>   | <b>Welcome and Updates from Michael Colgrove</b>                                        |
| <b>8:45 – 8:55</b>   | <b>Update from Pacific Power on their Cool Keeper Program</b>                           |
| <b>9:00 – 9:10</b>   | <b>Update from Portland General Electric on their Commercial Smart Thermostat offer</b> |
| <b>9:10 – 9:20</b>   | <b>Vendor introductions</b>                                                             |
| <b>9:20 – 9:40</b>   | <b>Trade Ally Awards</b>                                                                |
| <b>9:40 – 10:00</b>  | <b>Break &amp; Vendor Networking</b>                                                    |
| <b>10:00 – 11:00</b> | <b>Breakout Sessions (select one)</b>                                                   |

| <b>ROOM 1</b>                               | <b>ROOM 2</b>                                          | <b>ROOM 3</b>                                                     | <b>ROOM 4</b>                              | <b>ROOM 5</b>                                                                                             |
|---------------------------------------------|--------------------------------------------------------|-------------------------------------------------------------------|--------------------------------------------|-----------------------------------------------------------------------------------------------------------|
| Topic: Residential and 2027 Program Updates | Topic: HOMES/HEAR IRA Programs Update for trade allies | Solar Program Updates                                             | Home Performance Guild Information Session | Utilities Update: Cool Keeper Program – Pacific Power, Smart Thermostat offer – Portland General Electric |
| Speakers: Scott Leonard                     | Speaker: Meg Horst                                     | Speakers: Eduardo Beltran, Shannon Wall, Kyle Holmes, Nikita Chan | Speaker: Ashley Haight                     | Speaker: TBD                                                                                              |

**11:00 – 11:15**      **Break**

**11:15 – 12:15      Breakout Sessions (select one)**

| ROOM 1                                                        | ROOM 2                                                   | ROOM 3                                                            | ROOM 4                    | ROOM 5           |
|---------------------------------------------------------------|----------------------------------------------------------|-------------------------------------------------------------------|---------------------------|------------------|
| Topic: Residential Program and 2027 Updates ( <i>repeat</i> ) | Topic: HOMES/HEAR IRA for trade allies ( <i>repeat</i> ) | Solar Program Updates <i>continued</i>                            | Common Corrective Actions | <i>Tentative</i> |
| Speakers: Scott Leonard                                       | Speaker: Meg Horst                                       | Speakers: Eduardo Beltran, Shannon Wall, Kyle Holmes, Nikita Chan | Speaker: CLEAResult       | <i>Tentative</i> |

**12:15 – 12:30      Raffle and Forum Evaluation**