



# 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)

| Mt. Hood A                                                                                                                                                                                                                                      | Mt. Hood B                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | Mt. Hood C                                                                                                                                                                                              | Cascade room                                                                                                                                                                                                                                                  |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>Existing Buildings, Multifamily, and Residential Program Updates</p> <p>(offered both sessions)</p>                                                                                                                                          | <p>Incentive Application and Processing Workshop</p> <p>(offered both sessions)</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | <p>Using the Quality Install Tool to Ensure Weatherization &amp; HVAC Installation Best Practices (offered both sessions)</p>                                                                           | <p>Update on the Inflation Reduction Act Home Energy Rebates programs</p>                                                                                                                                                                                     |
| <p>Speakers: Marshall Johnson, Heath Heiberg</p> <p>Marshall and Heath will present information about incentive levels, program trends, and resources to support trade allies working with Existing Buildings, multifamily and Residential.</p> | <p>Speakers: Cameron Starr, Taylor Meyer, Andrea MacMurchy, Alex McCargar (operations), Portia Eaton and Gabriela Esparza (trade ally coordinators)</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> | <p>Speaker: Edward Louie</p> <p>Learn how PNNL's free Quality Install Tool can be used to ensure weatherization and HVAC projects meet installation best practices.</p> <p>Qualifies for CE credit.</p> | <p>Speakers: Kristina Donnelly (Oregon Department of Energy) and Mark Wyman (Energy Trust)</p> <p>Learn more about Inflation Reduction Act Home Energy Rebates programs with representatives from Oregon Department of Energy and Energy Trust of Oregon.</p> |

# Agenda (continued)

**10:45 – 11:45**

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

| Mt. Hood A                                                                                                                                                                                                                                      | Mt. Hood B                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | Mt. Hood C                                                                                                                                                                                              | Cascade room                                                                                                                                                                                                                                          |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>Existing Buildings, Multifamily, and Residential Program Updates<br/>(offered both sessions)</p>                                                                                                                                             | <p>Incentive Application and Processing Workshop<br/><br/>(offered both sessions)</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | <p>Using the Quality Install Tool to Ensure Weatherization &amp; HVAC Installation Best Practices<br/>(offered both sessions)</p>                                                                       | <p>Trade Ally and CBO Partnerships</p>                                                                                                                                                                                                                |
| <p>Speakers: Marshall Johnson, Heath Heiberg</p> <p>Marshall and Heath will present information about incentive levels, program trends, and resources to support trade allies working with Existing Buildings, multifamily and Residential.</p> | <p>Speakers: Cameron Starr, Taylor Meyer, Andrea MacMurchy, Alex McCargar (operations), Portia Eaton and Gabriela Esparza (trade ally coordinators)</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> | <p>Speaker: Edward Louie</p> <p>Learn how PNNL's free Quality Install Tool can be used to ensure weatherization and HVAC projects meet installation best practices.</p> <p>Qualifies for CE credit.</p> | <p>Speaker: Isaiah Kamrar</p> <p>Isaiah will share benefits of collaboration between community-based organizations (CBOs) and trade allies, along with mutual successes, in this informative breakout session designed for CBOs and trade allies.</p> |

**11:45 – 12:00**

## **Raffle Drawing**



Nest Pro



EDEN





Energy**Trust**  
of Oregon

***Introducing....***

***Joy Jerome Turtola***

***Workforce Development Manager***

***Customer Service & Support***

Workforce Development

Fall 2024





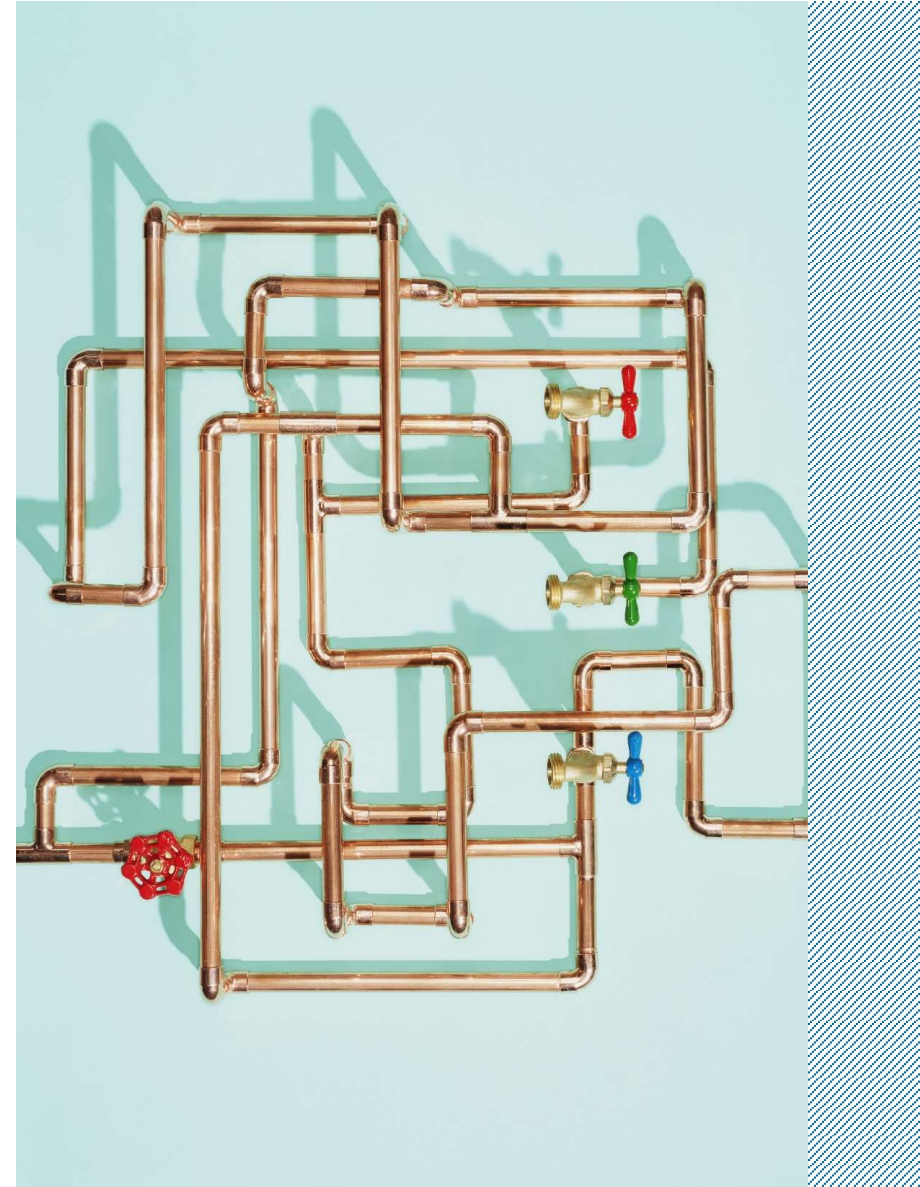
## Workforce Development Manager



- 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!

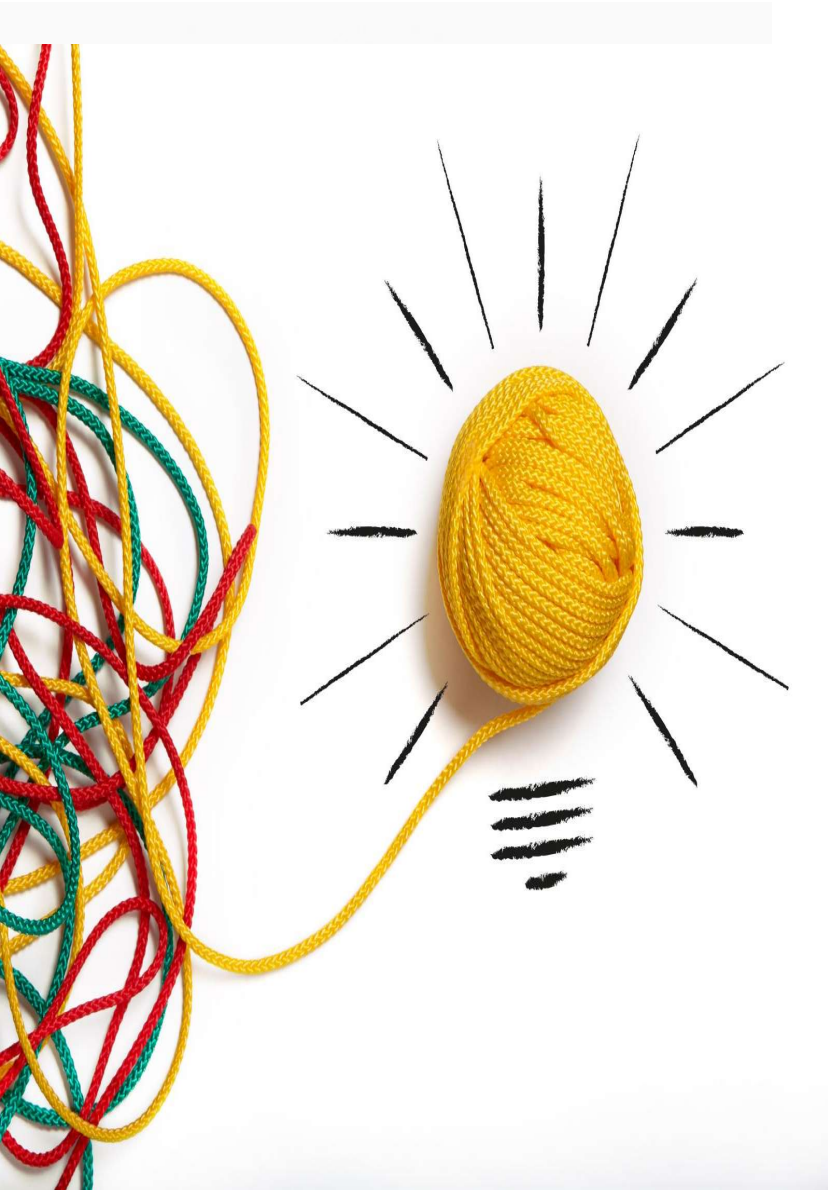
- How big are the challenges in workforce development?
- Where do we start?
- First step is to ASSESS
- *We would appreciate your expertise, local knowledge and wisdom*



Menti.Com

Joy will give survey code





## 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***

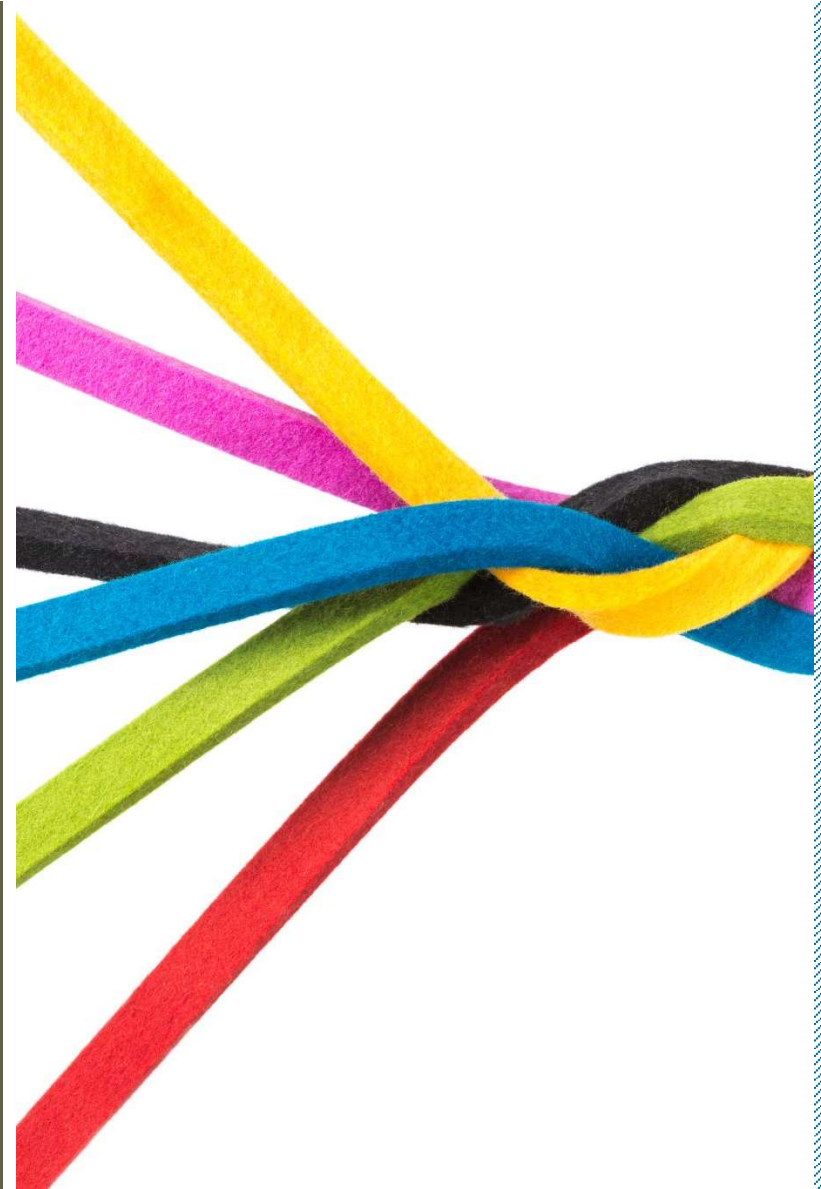
## Contact Information:

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 Heat Pumps & Electric*

## Building for the Future

Cameron Starr, Customer Experience Lead  
October 16, 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*

## Slide 19

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**JT0** I'd have this slide say, right up top, programs not likely to be available for Tas and customers until 2025 -- that's the key message we want them to walk away with

Julianne Thacher, 2024-09-29T19:46:58.393

**JT1** Thinking from the TA perspective, what they'll want to know is that we'll be taking more than one source of funding and combining them with our incentives into more and bigger incentives for customers -- I'd include that.

Julianne Thacher, 2024-09-29T19:47:53.581

## Supporting your business

- Business development funds and training opportunities MCO
- Expanding Contractor Development Pathway
- Contractor Mentorship Pathway and Small Business Resource network
- Begin launch of Community Partner Network



## Slide 20

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**MCO**    [@Cameron Starr] [@Emily Findley] How does the \$245,000 in business development funds compare to last year? I remember challenging the TAs in last year's forum to take more advantage of this incentive so I'd like to see if they actually did. Thanks.

Michael Colgrove, 2024-10-15T04:27:53.488

**EFO 0**    [@Michael Colgrove] in 2023, looks like the total amount distributed for the whole year was \$368,700 (\$271,590 was for Residential allies and \$97,110 for Commercial allies). You can also see a more detailed breakout here: <https://azureenergytrust.sharepoint.com/:u:/r/Operations/CCS/communications/Shared%20Documents/Executive>

Emily Findley, 2024-10-15T16:59:45.030



Cameron Starr, Customer Experience Lead  
[Cameron.starr@energytrust.org](mailto:Cameron.starr@energytrust.org)



# Residential Trade Ally Awards

## Categories

- Greatest increase in project volume award
  - Weatherization
  - HVAC
  - Overall
- Exemplary new trade ally award
  - Voted on by our account management staff
- Community Partner Organizations Contractor Award
  - Participation with an enrolled Community Partner Funding organization. Most CPF projects in 2023.
- Serving Small Businesses (commercial only)

## Regions

- North Coast
- Willamette Valley
- Portland-Salem Metro Area
- Columbia River Gorge



# Residential Portland-Salem Metro Area

# Greatest Increase in Project Volume – Residential Portland-Salem Metro Area (weatherization)

Congratulations to Northwest Weatherization



# Greatest Increase in Project Volume – Residential Portland-Salem Metro Area (HVAC)

Congratulations to Advantage Heating & Air Conditioning



# Greatest Increase in Project Volume – Residential Portland-Salem Metro Area

Congratulations to Sun Glow Home Services



# Exemplary New Trade Ally - Residential Portland-Salem Metro Area

Congratulations to Resilient Retrofits





# Community Partner Organization Contractors - Residential Portland-Salem Metro Area

Congratulations to The Heat Pump Store



# Residential North Coast

# Greatest Increase in Project Volume – Residential North Coast (HVAC)

Congratulations to P&L Johnson Mechanical



## Greatest Increase in Project Volume – Residential North Coast (overall)

Congratulations to Groth-Gates Heating & Sheet Metal



## Exemplary New Trade Ally - Residential North Coast

Congratulations to Scheidecker Heating



# Residential Willamette Valley

# Greatest Increase in Project Volume – Residential Willamette Valley (weatherization)

Congratulations to Day Energy Solutions



## Greatest Increase in Project Volume – Residential Willamette Valley (HVAC)

Congratulations to Hendrix Heating & Air Conditioning, Ltd.





# Greatest Increase in Project Volume – Residential Willamette Valley (overall)

Congratulations to Best Heating & Cooling



## Exemplary New Trade Ally - Residential Willamette Valley

Congratulations to Olvera & Sons Heating & Cooling, LLC



**OLVERA**  
**Heating & Cooling**

# Community Partner Organization Contractors - Residential Willamette Valley

Congratulations to Peak Heat Pumps & Electric



# Residential Columbia River Gorge

## Greatest Increase in Project Volume – Residential Columbia River Gorge (HVAC)

Congratulations to Performance Insulation & Energy Services



## Greatest Increase in Project Volume – Residential Columbia River Gorge (HVAC)

Congratulations to A&E Plumbing, Heating and Air



## Greatest Increase in Project Volume – Residential Columbia River Gorge (overall)

Congratulations to Installed Building Products of Portland



# Commercial Trade Ally Awards



# Commercial Portland-Salem Metro Area

# Greatest Increase in Project Volume – Commercial Portland-Salem Metro Area (weatherization)

Congratulations to Northwest Weatherization



# Greatest Increase in Project Volume – Commercial Portland-Salem Metro Area (HVAC)

Congratulations to The Heat Pump Store



# Serving Small Businesses – Commercial Portland-Salem Metro Area

Congratulations to NorthWest Insulators



# Greatest Increase in Project Volume – Commercial Mt. Hood Ductless

Congratulations to Mt. Hood Ductless



# Community Partner Organization Contractors - Commercial Portland-Salem Metro Area

Congratulations to The Heat Pump Store



# Commercial North Coast

# Greatest Increase in Project Volume – Commercial North Coast (HVAC)

Congratulations to The Heat Pump Store





# Greatest Increase in Project Volume – Commercial North Coast

Congratulations to P&L Johnson Mechanical



# Commercial Willamette valley

# Greatest Increase in Project Volume – Commercial Willamette Valley (weatherization)

Congratulations to Total Comfort Weatherization



Greatest Increase in Project Volume – Commercial  
Willamette Valley (HVAC)

Greatest Increase in Overall Project Volume – Commercial  
Willamette Valley (HVAC)

Congratulations to Alpine Heating & Air Conditioning



# Serving Small Businesses – Commercial Willamette Valley

Congratulations to Best Heating & Cooling



# Exemplary New Trade Ally – Commercial Willamette Valley

Congratulations to Bashful Bob's



# Commercial Columbia River Gorge

Greatest Increase in Project Volume – Commercial  
Willamette Valley (HVAC)

Greatest Increase in Overall Project Volume – Commercial  
Willamette Valley (HVAC)

Congratulations to A&E Plumbing, Heating and Air





