



# **Conception, Care and Feeding of a Lighting Trade Ally Network in Oregon**

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# Energy Trust of Oregon, Inc.

- Non-profit 501(c)(3)
- Administer public purpose fund
  - Electric – Pacific Power, Portland General Electric
  - Natural Gas – NW Natural, Cascade Natural Gas
- Energy efficiency + renewable energy programs
  - Technical services
  - Financial incentives

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# What is a Trade Ally?

- Install, sell or service
  - Energy efficient and renewable equipment and systems
- Typical trade allies
  - “The Trades”, contractors
- New additions
  - Distributors, manufacturers, engineers, retailers, etc

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# What We Did

- Developed + maintained statewide lighting trade ally network
  - Electricians, lighting contractors, lighting equipment distributors, lighting equipment manufacturers
- Seven year effort + growing – 2002 - ?
- Large volumes of consistent low cost kWh savings

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# How We Did It

- Market research
- Delivery plan
- Development strategy

# Market Research

- Lighting – 38% of electric energy use in commercial buildings (EIA)
- Know your history - Energy Trust - 2002
  - Pacific Power lighting trade ally network – 1995
    - Serves 31% of electric load
  - Portland General Electric
    - 40% of electric load
  - Combined – 71% of Oregon's electric load
- Energy Trust expands lighting trade ally network to cover 71% of Oregon's electric load
  - Leveraged existing network – supercharged it!

# Delivery Plan

- Evergreen Consulting (aka Roger Spring)
  - Subcontractor to Lockheed Martin
- Application process – formalize relationship
  - Experience – references are required + checked
  - Insurance – must be verified + stay current
    - Occurrence based commercial general liability
    - Energy Trust listed as additional insured
    - \$1 million per occurrence and \$1 million for general aggregate
  - Current state-required workers compensation certificate
  - Oregon Construction Contractor Board license – verified monthly
  - Oregon Business Registry Database

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# Development Philosophy

- Leverage existing market based skills + sales channels
- Value-added
  - Lighting trade allies
  - Customers of lighting trade allies



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# Development – 4 Core Strategies

- Keep It Simple
- Consistent and Timely Communication
- Develop Long-Term Meaningful Relationships
- Work At Business Speed

# Development – 4 Core Strategies

- Keep It Simple
  - Excel-based forms – Lighting Tool
    - Auto-populates
    - Energy Trust branded sales sheet
    - Incorporates state tax credits
  - Monthly project submittal window – 1<sup>st</sup> week of each month
  - Projects receive approval within 2 weeks or less
  - All site visits scheduled within a week and completed within 2 – 4 weeks
  - No manuals
- Consistent and Timely Communication
  - Monthly email blasts – only one a month!
  - Direct communication - cell #, office #, email of staff provide to trade allies
  - Annual mini-conferences – statewide
  - Trainings – Year of the Control
  - Annual focus groups + as needed

# Development – 4 Core Strategies

- **Long-Term Relationship**
  - Identify and support top performers
  - Joint customer sales calls
  - Managed accounts – top performers
  - Annual awards
  - Incentives may be assigned to trade ally by participant - \$\$\$
  - Cooperative advertising – up to \$3,000 per quarter
  - Listed on Energy Trust website directory
  - Receive project referrals
- **Work At Business Speed**
  - Hyper responsive – 24hr service
  - Rush requests, same day service

# Results

- Nearly 95% of all lighting projects are from official lighting trade allies
- Current lighting trade allies – 133 companies
  - Median # of employees = 9
  - Extension of Energy Trust workforce
- 20% reported 75% - 100% of 2007 revenue involved Energy Trust projects + incentives

# Results

- Existing Buildings Program

	<b>kWh</b>	<b>kWh From Lighting</b>	<b>Lighting Results</b>
2003	9,800,436	75%	7,350,327
2004	35,395,224	54%	19,113,421
2005	35,622,643	38%	13,536,604
2006	41,369,536	34%	14,065,642
2007	31,136,468	57%	17,747,787
2008*	40,421,896	64%	26,061,426
	<b>193,746,203</b>	<b>54%</b>	<b>97,875,207</b>
* 2008 figures are forecasted.			

# Results

- Pre/post install inspections
  - Any project receiving incentives over \$5,000
  - Visual inspection of installs and operation of fixtures and controls verified
- Quality control inspections
  - Random sample of projects with incentives less than \$5,000 (about 10% inspected)
  - Get under the hood
- Evaluation – Realization Rates (custom/standard)
  - 2004 – 93.9% / 100.9% - lighting specific
  - 2005 – 103.8% / 91.5% - lighting specific
  - 2006 – 98.4% - all kWh
  - 2007 – 97.6% - all kWh
  - 2008 - TBD

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# Lessons Learned

- Development Strategy
  - Keep It Simple
  - Consistent and Timely Communication
  - Develop Long-Term Meaningful Relationships
  - Work At Business Speed
- Listen + be responsive
- Meet the needs of the trade allies

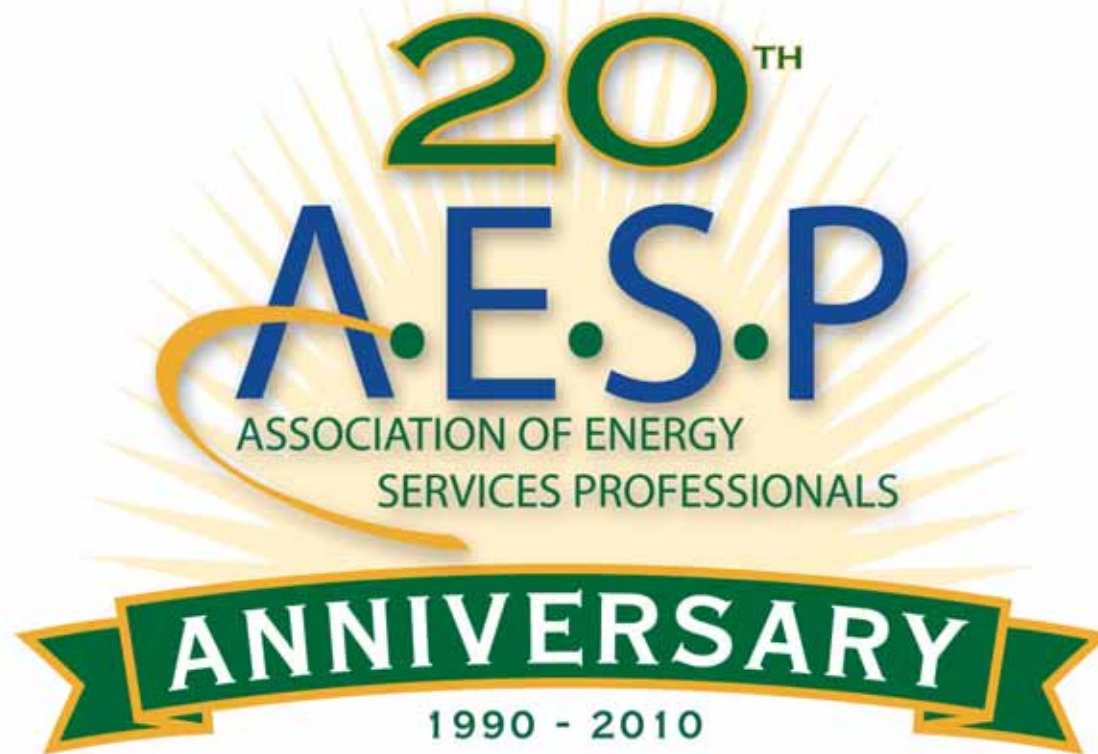
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# Questions?

- Thank you
- Contact info
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  - [www.energytrust.org](http://www.energytrust.org)







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