2014 New Trade Ally Orientation

September 24, 2014
Agenda

- Introductions
- PUD Conservation Programs Overview
- Overview of Weatherization & Heating Program Process
- How & Why to Become a PUD Registered Contractor
- Resources
- Training Pre-registration
- Q & A
PUD Conservation Programs Overview
Why PUD has Conservation Programs

- Commissioners -
  - Have stated that our first choice resource to meet future load growth is conservation and renewables

- PUD Goal -
  - Acquire all cost-effective conservation

- Initiative 937 -
  - Mandated conservation targets
PUD Residential Offerings

- Compact Fluorescent & LED Light bulbs and fixtures
  - buydowns, rebates, bulb exchanges
- Efficient clothes washer rebates
- Incentives for:
  - Insulation
  - Efficient windows
  - Heat pumps
- Program rules for multi-family retrofit and single family new construction differ.
Residential Weatherization & Heating

- **Insulation**
  - Attic
  - Floor
  - Wall
  - Duct

- **Efficient Glass**

- **Heat Pumps**
  - Air source
  - Ductless
  - Geothermal
2013 - Completed Projects

Glass: 459
Ceilings: 187
Floor: 202
Walls: 44
Ducts: 559
HP-Air: 401
HP-Geo: 5
DHP: 578
Program Eligibility - Single Family

Home must have:

- Permanently installed electric heat
  - Wood/gas stoves and inserts not applicable.
- An active PUD account
  - (Snohomish County or Camano Island)
- Only living areas of the home are eligible
- All work must be pre-authorized, except ductless heat pumps
- Not a repair or remodel program
# Incentives - Single Family Weatherization

<table>
<thead>
<tr>
<th>Eligible Measure</th>
<th>Incentive</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attic, Floor, and Wall Insulation</td>
<td>$.50 per square foot</td>
</tr>
<tr>
<td>Duct Sealing &amp; Insulation</td>
<td>$5.00 /Lineal Foot up to $450</td>
</tr>
<tr>
<td>Glass any Frame SP to DP (u&lt;=.30)</td>
<td>$6.00/sq ft</td>
</tr>
<tr>
<td>Glass Metal Frame DP to DP (u&lt;=.30)</td>
<td></td>
</tr>
</tbody>
</table>

* Note: Programs and incentives subject to change. Always check [www.snopud.com/weatherization](http://www.snopud.com/weatherization) for current offerings.
## Incentives - Single Family Heating

<table>
<thead>
<tr>
<th>Eligible Measure</th>
<th>Incentive</th>
</tr>
</thead>
<tbody>
<tr>
<td>Heat pumps, ducted air source conversion 9.0 HSPF</td>
<td>$1,500</td>
</tr>
<tr>
<td>Heat pumps, ducted air source upgrade</td>
<td>$600</td>
</tr>
<tr>
<td>Ductless Heat Pump (no pre-approval)</td>
<td>$600 - $800</td>
</tr>
<tr>
<td>Geothermal Heat Pump</td>
<td>$2,000</td>
</tr>
<tr>
<td>Geothermal w/dedicated Domestic Hot Water</td>
<td>$2,500</td>
</tr>
</tbody>
</table>

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Financing Options

Link from Trade Allies (Wx & Heating):

“Program Details”
or
“Jump To...”

Looking to finance your energy efficiency or solar energy project?
The following institutions have financing programs for energy-efficiency and renewable energy projects in Snohomish County and Camano Island.

This list is provided solely for the convenience of Snohomish PUD customers and is not an endorsement by the PUD of any of the credit unions, banks, or programs on the list.

Snohomish County

Puget Sound Cooperative Credit Union
www.psccu.org/efficiency.php
askus@psccu.org
1-800-273-1550

Banner Bank
www.bannerbank.com
1-800-272-9533

Umpqua Bank
www.umpquabank.com
Thuy Nguyen | 206.749.7240
thuynguyen@umpquabank.com

Puget Sound Cooperative Credit Union
Energy Smart Loans
www.psccu.org/efficiency.php

REGISTERED PUD CONTRACTOR
Snohomish County
Energy Smart Loan Program

- County loan program for home energy efficiency upgrades
- Wide range of eligible energy efficiency measures
- Loan amounts: $1,000-$50,000
- Fuel neutral program
County Loan Program

Lisa Dulude, Snohomish County: 425-388-3965
lisa.dulude@snoco.org

Shannon Ellis-Brock, PSCCU: 425-456-2686
shannone@psccu.org

General inquiries should be made to
- askus@psccu.org
- 1-800-273-1550

www.psccu.org
Multi-Family Program Requirements

Program on hold, but accepting applications for 2015

- 3 or more attached units up to 3 stories (possible exceptions)
- Must be electrically heated (covers common areas & units)
- Specific Multi-Family application
- Individual bids required for each building
## Multi-Family Incentives

Program on hold, but accepting applications for 2015

<table>
<thead>
<tr>
<th>Measure</th>
<th>Maximum Incentive/Rebate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attic Insulation</td>
<td>$.65 / sq ft</td>
</tr>
<tr>
<td>Wall Insulation</td>
<td>$.50 / sq ft</td>
</tr>
<tr>
<td>Floor Insulation</td>
<td>$.75 / sq ft</td>
</tr>
<tr>
<td>Glass any Frame SP to DP (u&lt;=.30)</td>
<td>$8/sq ft</td>
</tr>
<tr>
<td>Glass Metal Frame DP to DP (u&lt;=.30)</td>
<td>$6/sq ft</td>
</tr>
<tr>
<td>Electronic Thermostats</td>
<td>$30 each</td>
</tr>
<tr>
<td>All thermostats must be replaced to be eligible</td>
<td></td>
</tr>
<tr>
<td>Energy Star CFL Lighting Fixtures</td>
<td>$15 each</td>
</tr>
</tbody>
</table>

*Note: Programs and incentives subject to change. Always check [www.snopud.com/weatherization](http://www.snopud.com/weatherization) for current offerings.*
Overview of Weatherization and Heating Program Process
Meeting with Customers & Bidding the Job

- **Solicit** - PUD only refers customers to published list of Registered Contractors
- **Promote** - PUD program benefits
- **Discuss** - incentive amounts & customer balances
Customer Application Review

Customer completes application and submits with bid

Bids are not required at this point for heat pump applications

Ductless Heat Pumps rebate form and invoice submitted after installation

PUD completes internal review and processes the paperwork

Site visit scheduled with PUD inspector to verify eligibility and bid accuracy (when needed)

For heat pumps, a heat loss analysis is calculated and provided to customer so they can start obtaining bids

ALL work must be pre-authorized via Energy Services Authorization (ESA)
Authorization, Inspection and Payment

Once approved, PUD issues ESA to Installer and customer

After ESA received, installer schedules installation with customer

Installer schedules in-progress inspections (if required)
Allow 2 full working days excluding holidays (schedule posted to www.snopud.com/tradeallies)

Installer completes installation, signs paperwork (ESA) and submits to PUD
Include all required documents Email CE@SNOPUD.COM

PUD performs post inspection
Complete Minor Deficiency or Remedial within 30 days Email CE@SNOPUD.COM

PUD issues payment upon satisfactory completion of installation and paperwork
Jobs tracked by contractor Remedial notices impact contractor rating
Uniform Bid Sheets

- Bids are good for a **minimum** of 60 days
- Bid sheets are available:
  - Online
  - Editable PDF’s
- Contractor & customer must sign/date bid sheet
- When submitting electronically **DO NOT** FORGET to check electronic submittal box
The Energy Services Authorization

- This is your **approval** to start work.
- Remember to **sign and date** the Contractor box.
Warranty Requirements

- 2-year minimum all inclusive labor and materials required
- 10-year minimum on all glass
- Leave warranty information with homeowner
New Construction Program
Requirements

- Must be electrically heated.
- Specific application.
- Invoices required.
- Incentives typically go to the builder or home owner.
## New Construction Single Family Incentives

<table>
<thead>
<tr>
<th>Measure</th>
<th>2014 Incentive</th>
</tr>
</thead>
<tbody>
<tr>
<td>Heat pumps (air source) 8.5 HSPF</td>
<td>$500.00</td>
</tr>
<tr>
<td>Heat pumps (air source) 9.0 HSPF</td>
<td>$1,000.00</td>
</tr>
<tr>
<td>Geo thermal heat pumps</td>
<td>$1,500.00</td>
</tr>
</tbody>
</table>

*Note: Programs and incentives subject to change. Always check [www.snopud.com/weatherization](http://www.snopud.com/weatherization) for current offerings.*
How and Why to Become a PUD Registered Installer
Why: Benefits

- Sales leads
- Cash Incentives
- Marketing support
- Credibility
  - PUD brand
Performance Contracting

A new “scorecard” model for the PUD Registered Contractor program that will provide more benefits to contractors who perform at a higher level.

- Supports more efficient processing
- Supports customer satisfaction
- Acknowledges & rewards quality
- Builds on trust & partnership
Marketing Support

- Selling materials
- E-newsletter list
- Television Commercials
- Newspaper Ads
- Community fairs/events
- Bill inserts
- Direct mail
Registered Contractor Logo

• All use must be pre-approved
• Logo must be unaltered
• www.snopud.com/tradeallies for specifications & guidelines
• For use on print materials and website
• If de-listed - logo must be removed immediately and any remaining materials discarded

Cathy Anderson
425-783-1798
cjanderson@snopud.com
Online Directory

- Allows for more dynamic interaction
- Customers can search by service or location
- Default sort by number of jobs completed
- If you haven’t already submitted your info please do so.
Online Directory

Windows Contractors

Glass By Lund, Inc.
425-334-5863 | info2@glassbylund.com

SERVICES: Windows
SPECIALTIES: Windows
DISTANCE: 7.5 miles
Glass By Lund, Inc. is a family-owned and operated business, serving greater Snohomish County since 1967. We have partnered with Snohomish County since its program inception in 1969. Throughout 50 years, Glass by Lund has earned its fine reputation by specializing in honest dealing and a no-pressure approach. More...

Blue Sky Glass Installation
425-334-9198 | info@blueskyglass.net

SERVICES: Windows
SPECIALTIES: Windows
DISTANCE: 10.9 miles
Blue Sky Glass has focused on the design and installation of high-quality, innovative window products since 1985. We have been a PUD Registered Contractor for over 22 years. Every window and glass unit is critically measured and ordered specifically for your home. We use the highest-grade sealants. More...

Superior Weatherization
360-658-7411, 425-350-1194 | jayaskus@yahoo.com

SERVICES: Insulation, Windows
SPECIALTIES: Insulation, Windows
DISTANCE: 10.3 miles
Superior Weatherization has been installing replacement vinyl windows and insulation in older homes as a PUD-approved contractor since 1993. Our experienced crews have earned a reputation for professionalism and efficiency that our customers can relate. Whether your home needs new windows, entry doors, skylights, or insulation in attics, sidewalls or floors, contact More...
Online Directory

Bel-Red Energy Solutions

425-493-5353
800-352-1818
www.belred.com
info@belred.com
10733 - 47th Pl W, Mukilteo, WA, 98275

SERVICES:
- Heating
- Insulation
- Windows

SPECIALTIES:
- Air Source
- Geothermal
- Ductless Heat Pumps
- Insulation
- Windows

Since 1986, Bel-Red Energy Solutions has served the Puget Sound area with Smarter Products, Better Service and Caring People. We are dedicated to improving your home’s efficiency and comfort, offering guaranteed solutions for heating, cooling, insulation, windows and more.

Bel-Red Energy Solutions offers a full range of energy-saving products, including:

- Heat pump systems
- Air Source
- Geothermal
- Ductless
- Programmable thermostats
- Insulation
- Windows

Plus, a wide range of other products that can substantially reduce your home’s energy consumption and your carbon footprint. Our team of licensed and certified technicians and installers (NATE, BPI, RESNET, IGSHA), and our experienced
How: Requirements

- Washington State Licensed Contractor
- Active business license for 24 months
- Insured as required –
  - Energy Efficiency Installer Agreement
- Bid & Install work to PUD specifications
Monitoring of Performance

- **Pass Rate**
  - 80% inspection pass rate required

- **Written Complaints**
  - No more than 2 written complaints in any 12 month period

- **Suspensions**
  - Completions exceeding 3 months - 30 day suspension.
  - Expiration of insurance or licenses – 30 day suspension
  - Only 2 suspensions allowed in any 12 month period
Steps to Register

- Complete Energy Efficiency Contractor Agreement
- Attend PUD Orientation Meeting
- Complete Contractor Questionnaire
- Provide copies of Washington State License
- Obtain insurance
  - List PUD as additional insured
- Complete W-9
- If applicable, attend Ductless Heat Pump Orientation (Goingductless.com)
- Submit all required documents

FORMS AVAILABLE ONLINE AT WWW.SNOPUD.COM/TRADEALLIES
What Happens Next?

- Application goes through internal review process
- We will notify you when our review is complete
  - Applications are not reviewed until everything is provided
  - Registered Contractor list is updated once a month
- **Attend October 7\(^{th}\) Training Session**
  - Pre-registration opens today
www.snopud.com/TradeAllies

>> Information for Weatherization & Heating contractors

- Bookmark or save to your “favorites”
- Get the latest program documents & reference materials here:

<table>
<thead>
<tr>
<th>Logo guidelines</th>
<th>Extension Requests</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bid Forms</td>
<td>Training PPTs</td>
</tr>
<tr>
<td>Contractor Agreement</td>
<td>Specifications</td>
</tr>
<tr>
<td>Monitoring Procedures</td>
<td>Newsletters</td>
</tr>
<tr>
<td>Financing Options</td>
<td>Bulletins</td>
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</table>

LEARN ~ CONNECT ~ SAVE

REGISTERED CONTRACTOR
SNOHOMISH COUNTY PUBLIC UTILITY DISTRICT NO. 1
Trade Allies: Weatherization & Heating

Thank you for your interest in becoming a PUD Registered Contractor. Information about our conservation programs and the forms you need to complete to become a PUD Registered Contractor are available here. To get started, you first need to complete, initial each page, sign, and return the Energy Efficiency Contractor Agreement (see documents below). Contractors submitting a completed Energy Efficiency Contractor Agreement will automatically be placed on our contact list for the next orientation meeting. Orientations are held twice a year, in the spring and fall.

For more information, please click on the link below for "New Weatherization/Heat Pump Contractors.”

Weatherization Documents
- New Weatherization/Heat Pump Contractors Overview & Instructions on signing up for our registered contractor list
- Energy Conservation Participation Application & Agreement* (2180) Revised 8/13
- Energy Efficiency Contractor Agreement Revised 2/13
- Installer Performance Monitoring
- Balance Point & Heat Loss Forms
- Heat Pump Start-up Checklist* (2197)
- Heat Pump Bid Form* (2192)
- Insulation Bid Form* (2197)
- Window Installation Bid Form* (2188)
- W-2 IRS Form
- Weatherization Specifications
Pre-register for training today

- October 7th
- Separate sessions for Insulation, Windows and Heat Pumps
- Covers
  - Program Guidelines
  - Specifications
  - Paperwork requirements
- Send sales and install staff who will be directly working on the program
October 7th Training Schedule

- 8:30AM – 10:00AM – Windows
- 10:30AM – 1:30PM – Insulation
- 2:00PM – 4:00PM – HVAC
Contact Info

Program Managers

✿ Cathy Anderson  425-783-1798  cjanderson@snopud.com
✿ Kevin Watier  425-783-1714  kjwatier@snopud.com

Inspectors

✿ Jay Snyder  425-783-1721  cell 425-239-1053  jasnyder@snopud.com
✿ Aaron Stewart  425-783-1726  cell 425-315-6185  apstewart@snopud.com
✿ Ed Walstad  425-783-8158  cell 425-231-2797  edwalstad@snopud.com
Contact Info

☞ PRIMARY Email  CE@snopud.com

☞ Office Support Staff
   - Carolyn Beebe
   - Kim Wilcox
   - Andrea Duffy

☞ Fax  425-267-6762

☞ Energy Hotline  425-783-1700
   Hotline Specialist Mordecai Cooke

☞ Mailing Address  Residential Programs
   PO BOX 1107 MS E2
   Everett, WA 98206-1107
Thank You!