

## **BREAKOUT SESSION SUMMARIES**

- **Heat Pump Water Heaters (Jordan Whiteley):**

- ❖ \$500 Rebate
- ❖ Objective is to increase number of installs in 2019
- ❖ The design makes it a challenge to install.
- ❖ Rebate is good for new construction.

Is there a comparison site?

- ❖ Consumer Reports

Allowed in a heated space

- ❖ Yes, will cool the space.

How much space is needed?

- ❖ 700 cubic feet of air is needed
- ❖ Installation instructions are straight forward
- ❖ Ideal area – garage, basement

What is the water limit?

- ❖ 28-29 gallons per hour
- ❖ 30 gallons per hour in heat pump mode

Who repairs the units?

- ❖ Pacific Plumbing
- ❖ The entire unit is under warranty.

Can customer have a gas heated home?

- ❖ Yes, however water heater must be electric.

- **Let's Talk (Lis Saunders):**

Ideas from trade allies:

- ❖ Bill Stuffer with list of participating Contractors & referral programs – getting everyone on-board, referring to different trades. Rewards of some kind for Trade Ally's referring to each other and for customers referring to Trade Ally's to other customers. Encourages networking and cuts out the need for marketing.

- ❖ Build in checks to make sure people have upgraded windows/insulation (if they wish to) before putting in an HP so they don't make themselves ineligible.
- ❖ Get involved in residential new construction incentives with companies like Better Built N.W. Custom projects is a start.
- ❖ List all rebates in a bill stuffer – include Published Trade Ally List

- **Faster Approvals and DocuSign (John Walkowiak):**

Can you still use traditional method if customer doesn't have email?

- ❖ Yes!

Will customer receive fully executed version after all signatures have been processed?

- ❖ Yes!

How can approval process be sped up for loans?

- ❖ In discussion.

Can contractor initiate if they have DocuSign?

- ❖ Yes...probably. This is not something TPU had considered but we can't initially see a reason why this would be a problem for residential.

Does contractor get to see prior to sending?

- ❖ That depends on the project/document/etc. We stress that DocuSign is for **final** documents so this is not the time for negotiations and back and forth. That happens outside of DocuSign.

Is DocuSign the default process?

- ❖ Yes, that is the goal but it is not a set rule. We will do what will create the more positive customer experience. (In other words, we're never going to force someone to use it.)

How does it not end up in the spam folder?

- ❖ We can track if/when people open the documents. If we notice something isn't opened, we can and will contact the customer to let them know to look in Spam/Junk.

Will DocuSign status be updated on the portal?

- ❖ At this time, we are investigating this functionality, but it is not looking promising for the near future.

Will applications be available via DocuSign?

- ❖ Yes, this is one of our goals.

- **All Things HVAC (Mark Percy):**

- ❖ TAs felt lower HSPF requirements to 8.5 would greatly increase possible projects
- ❖ TAs requested an increased loan amount for multiple head ductless

Process and Procedure changes include:

- ❖ No longer required to itemize the permit costs on bids and invoices

- ❖ No longer require a Tacoma Power Heating & Cooling bid form or Duct Seal bid form as long as the bid/proposal has the required information (see Heating and Cooling Bid Requirements)
- ❖ Can replace an old central heat pump after it has died as long as we can see where the power consumption has increased during the winter months due to the auxiliary electric strip heat activation. Call 253 502-8363 for pre-approval on these.

Form Changes and Modifications:

- ❖ The Owner Occupied application, Rental Property application, and Rental Property application with 5 or more units
- ❖ Heating and Cooling Bid form has been modified to reflect the rebate/loan options and can be completed electronically. The new bid form is available on the TA Portal (optional to use)
- ❖ Duct Seal Bid form reflects the rebate options and can be completed electronically. The new bid form is available on the TA Portal (optional to use)
- ❖ Final Step – Inspection card has some updated phone numbers
- ❖ Program Requirements and Specifications have a few minor updates and changes

Trade Allies asked Tacoma Power to consider the following:

- ❖ Offering a rebate/loan option for lower HSPF systems to make it more affordable for customers to move ahead with conversions (especially manufactured home owners)
- ❖ Increase the rebate/loan for multi-head and combination ducted/ductless mini-split systems
- ❖ It would be great if the Assignment of Funds form could be dropped and incorporated into the application. Tacoma Power is working on this and hope to get our Legal Department to approve this. Stay tuned.

- **Portal of the Future (Hollis Tamura):**

*What are trade allies looking for in a portal?*

***One location to find all documents, including up-to-date and accurate projects status reports in language TAs understand. Easy to navigate, user friendly for all, and tested by end users before going live.***

Navigation:

- ❖ User friendly for older and tech challenged people
- ❖ Portal to be single point to manage projects
- ❖ Ability to upload documents, customer applications, missing info, etc. for direct submittal to CEP

- ❖ Want one place to look and find all info, in one spot
- ❖ Link to other City of Tacoma permitting status (example: Electrical inspections)

Inform:

- ❖ Send Notifications of when and how documents are sent to owner (example: when contracts are mailed to customer)
- ❖ Include time stamps on stages in the process so TA can hold the customers' hand through the process. Don't want to act prematurely but also don't want a project to sit for a week.
- ❖ Show events calendar that TA can attend or be involved in (example: neighborhood outreach or community events)

Project Reports/Status:

- ❖ More up to date, accurate reporting
- ❖ Faster updates on the status of a project and in terminology they can understand
- ❖ Clear definitions of status codes
- ❖ Make it easy to find and understand where a project is in the process
- ❖ Status of loans, contracts, etc.
- ❖ Schedule of inspection dates and status

Web versus Portal:

- ❖ One stop shopping instead of clicking all over the website to try and find the link you are interested in
- ❖ Bridge the gap between the web and the portal
- ❖ Resource to literature (Applications, Requirements, etc.)
- ❖ People get lost on the website, everything is always moving

Other:

- ❖ Test product with end-users before
- ❖ Use design like banks (example: Wells Fargo) finalizing
- ❖ Phone/tablet friendly formatting

- **Weatherization World (Joan Thornhill)**

- ❖ TPU Paperwork does not mention "must be built prior to 1988"
- ❖ How do TAs get on TPU's published contractor list?

Process and Procedure changes include:

- ❖ No longer require a Tacoma Power Duct Seal bid form as long as the invoice has the required information (see Invoice Requirements)
- ❖ Attic insulation for Rental Properties with 5 or more units in the building is changed to R11 or less existing to qualify for a rebate. Now consistent with Owner Occupied and Rental Properties up to 4 units.

Form Changes and Modifications:

- ❖ The Owner Occupied application, Rental Property application, and Rental Property application with 5 or more units
- ❖ Income Eligible Grant Application has updated income requirements
- ❖ Duct Seal Bid form reflects the rebate options and can be completed electronically. The new bid form is available on the TA Portal (optional to use)
- ❖ Final Step – Inspection card has some updated phone numbers
- ❖ Program Requirements and Specifications have a few minor updates and changes

Trade Allies asked Tacoma Power about the following:

- ❖ How old does the house have to be to qualify for insulation and window rebates? It is not currently listed on the program applications. Tacoma Power will add this requirement to the application, “Home must be built before 1988”

Reminder:

- ❖ Must install a Carbon Monoxide alarm with all insulation and window jobs whenever a combustion appliance (fireplace, wood stove, gas stove, gas water heater, etc.) is present in the home. (Tacoma Power has a supply of these available for free, just stop by to pick some up)

- **Multifamily (Lonnie Junderson):**

- ❖ Great potential for lighting projects

- **C/I HVAC (Natasha Houldson):**

- ❖ TAs interested in ways we can make information more prominent
- ❖ Looking into different ways we could help customers become more educated about our programs

- **C/I Lighting (Roger Perry):**

- ❖ TAs believe it would be beneficial for us to do training sessions at their businesses.