

## Home Performance with ENERGY STAR Program Plan Outline

This outline is designed to assist potential and current Home Performance with ENERGY STAR (HPwES) program sponsors in developing and refining program implementation plans. Each section highlights important considerations and questions that sponsors need to address. The HPwES Sponsor Guide and the HPwES Partnership Agreement provide additional clarification on program requirements.

<b>SUGGESTED PROGRAM PLAN OUTLINE</b>	
<b>1) Introduction</b> a) Organization Background b) Goals and Objectives c) Target Market d) Implementation Schedule e) Estimated Budget <b>2) Program Design</b> a) Home Performance Protocols b) Contractor Recruitment Plan i) Training ii) Participation Requirements c) Marketing/Media Plan d) Incentive/Financing Plan e) Quality Assurance Plan <b>3) Program Evaluation</b> a) Evaluation Plan	
<b>PROGRAM PLAN GUIDANCE</b>	
<b>1) Introduction</b>	
<b>Organization Background</b>	<b>Who is the sponsoring organization?</b> <ul style="list-style-type: none"> <li>• Type of organization (e.g. Utility, State Energy Office, Non-profit, etc)</li> <li>• Describe relationship between program sponsor and other organizations that assist with program implementation</li> </ul>
<b>Goals and Objectives</b>	<b>What are the programs goals and objectives?</b> <ul style="list-style-type: none"> <li>• Number of contractors participating by year</li> <li>• Number of jobs completed by year</li> <li>• Projected electricity and heating fuel savings (if appropriate)</li> </ul>
<b>Target Market</b>	<b>Where will the program be delivered?</b> <ul style="list-style-type: none"> <li>• Describe initial target market(s) conditions.               <ul style="list-style-type: none"> <li>○ Utility rates, housing and population demographics, average energy use, typical improvement measures</li> <li>○ Identify market influencers, stakeholders, and advisory group.</li> <li>○ Gas and electric utility territories. (propose strategies for cooperation)</li> </ul> </li> </ul>
<b>Implementation Schedule</b>	<b>What is the schedule for implementation?</b> <ul style="list-style-type: none"> <li>• Timeline for delivery (e.g. program launch, contractor recruiting, contractor training, marketing kickoff)</li> </ul>
<b>Budget</b>	<b>What is the budget?</b>

<b>2) Program Design</b>	
<b>Home Performance Protocols</b>	<p><b>How does the program meet ENERGY STAR requirements for Home Performance with ENERGY STAR?</b></p> <ul style="list-style-type: none"> <li>• Describe the home energy audit and any required modeling tool/software</li> <li>• Describe the standard operating procedures and/or protocols</li> </ul>
<b>Contractor Recruitment Plan</b>	<p><b>How will the program recruit contractors?</b></p> <ul style="list-style-type: none"> <li>• Process for identifying and recruiting contractors <ul style="list-style-type: none"> <li>○ Are there key local organizations to assist in recruiting?</li> </ul> </li> <li>• Describe contractor incentives (consider performance-based incentives)</li> </ul> <p><b>What are the contractor requirements and process for participation?</b></p> <ul style="list-style-type: none"> <li>• Describe required training / certifications <ul style="list-style-type: none"> <li>○ Will BPI certification and accreditation be required or encouraged?</li> <li>○ Contractor mentoring period</li> </ul> </li> <li>• Contractor Participation Agreement <ul style="list-style-type: none"> <li>○ Participation criteria, participant and sponsor roles, expectations, etc.</li> <li>○ Procedures for terminating participation if necessary</li> </ul> </li> </ul>
<b>Marketing /Media Plan</b>	<p><b>How does the sponsor plan to market the program to homeowners?</b></p> <ul style="list-style-type: none"> <li>• Describe how HPwES will be used in sales and marketing materials, including Web sites. <ul style="list-style-type: none"> <li>○ Consider use of materials and tools available from EPA and DOE (<a href="http://www.energystar.gov/hpwessponsors">www.energystar.gov/hpwessponsors</a> )</li> <li>○ Consider special events like Home Energy Makeover Contests</li> </ul> </li> <li>• Explain how consumer inquiries will be managed</li> </ul>
<b>Incentive/Financing Plan</b>	<p><b>What financing or financial incentives will be offered to homeowners?</b></p> <ul style="list-style-type: none"> <li>• Describe what consumer incentives or financing will be available <ul style="list-style-type: none"> <li>○ Consider financing with interest rate buy-down</li> <li>○ Consider incentives for comprehensive improvements</li> </ul> </li> </ul>
<b>Quality Assurance Plan</b>	<p><b>How will the program verify that participating contractors are meeting program standards?</b></p> <ul style="list-style-type: none"> <li>• Identify the organization or individuals responsible for quality assurance.</li> <li>• Describe the quality assurance protocols that will be followed including details on project file review and on-site inspections.</li> <li>• Describe how the program will measure homeowner satisfaction.</li> <li>• Describe the protocols that will be followed to provide feedback about a contractor's performance in the program and corrective actions.</li> </ul> <p><b>What is the reporting process for improvements completed by participating contractors?</b></p> <ul style="list-style-type: none"> <li>• Explain reporting and record keeping protocols. <ul style="list-style-type: none"> <li>○ Consider using contractor incentives to encourage reporting.</li> </ul> </li> </ul> <p><b>Will a "Completion Certificate" be issued after work is completed?</b></p> <ul style="list-style-type: none"> <li>• Consider using certificate to encourage QA reporting and promote referrals.</li> </ul>
<b>3) Program Evaluation</b>	
<b>Evaluation Plan</b>	<p><b>How will program success be evaluated?</b></p> <ul style="list-style-type: none"> <li>• Identify what information and metrics to collect for evaluation.</li> <li>• Develop system to report and track program results.</li> </ul>