



**Better Buildings Residential Network Data  
& Evaluation Peer Exchange Call Series:  
*Cost-Effective, Customer-Focused and  
Contractor-Focused Data Tracking Systems***

July 24, 2014

*Call Slides and Discussion Summary*

# Agenda

- Welcome
- Call Logistics and Introductions
- Residential Network and Peer Exchange Call Overview
- Featured Speakers:
  - Jenna Zelenetz, Empower Efficiency
  - Kathryn Eggers, Elevate Energy
- Discussion:
  - What data tracking systems have you tried?
  - What are some attributes of a good data tracking system? What are some potential shortcomings?
  - What advantages do tracking systems bring?
  - What challenges have you encountered with data tracking systems? How did you overcome them?
  - Other questions/issues related to data tracking systems?
- Poll: Future Call Topics

# Participating Programs and Organizations

- Austin Energy
- Building Performance Center
- Center for Sustainable Energy (San Diego, CA)
- City of Providence, RI
- City of Savannah, GA
- City of Seattle, WA
- Clinton Foundation
- Efficiency Maine Trust
- Elevate Energy (Energy Impact Illinois)
- Empower Efficiency
- Energy Coalition (Irvine, CA)
- Snohomish County Public Utility District (Everett, WA)
- Vermont Energy Investment Corporation (Efficiency Vermont, DC Sustainable Energy Utility)

# Better Buildings Residential Network

- **Better Buildings Residential Network**: Connects energy efficiency programs and partners to share best practices to increase the number of American homes that are energy efficient.
  - Membership: Open to organizations committed to accelerating the pace of existing residential upgrades. Commit to providing DOE with annual number of residential upgrades, and information about benefits associated with them.
  - Benefits:
    - Peer Exchange Calls
    - Tools, templates, & resources
    - Newsletter updates on trends
    - Recognition: Media, materials
    - Optional benchmarking
    - Residential Solution Center

For more information & to join, email [bbresidentialnetwork@ee.doe.gov](mailto:bbresidentialnetwork@ee.doe.gov).

- **Better Buildings Residential Network Group on Home Energy Pros**

Join to access:

- Peer exchange call summaries and calendar
- Discussion threads with energy efficiency programs and partners
- Resources and documents for energy efficiency programs and partners

<http://homeenergypros.lbl.gov/group/better-buildings-residential-network>

# Better Buildings Residential Network Group on Home Energy Pros Website



## Better Buildings Residential Network

Created by Better Buildings Support

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### Information



The Better Buildings Residential Network connects energy efficiency programs and partners to share best practices and learn from one another to increase the number of American homes that are energy efficient.

Website: <http://betterbuildings.energy.gov/bbm>

Latest Activity: 8 hours ago

Join the conversation in the discussion forum below. You can use the "Follow" link at the bottom of the forum to receive an email whenever a new discussion is posted.

Open the table of contents below and follow the links to access topical materials and resources.

### Helpful Links

- Table of Contents
- Better Buildings Residential Network
- Better Buildings Neighborhood Program Website
- Home Performance with ENERGY STAR
- Home Energy Score



Table of Contents



+New Discussion



Peer Exchange Call Archive



Better Buildings Network View



Tools



Related Events

### Discussion Forum



#### Attend Today's Peer Exchange Calls on Program Sustainability and on Workforce

Don't miss today's calls. "Collaborating with Utilities on Residential Energy Efficiency" begins at 12:30 p.m. Eastern and "Engaging Efficiency First Chapters and Other Trade Associations in Energy Efficiency Programs" begins at 3:00 p.m. Eastern.

Continue

Tags: Peer Exchange Calls

Started by Better Buildings Support 8 hours ago.



#### Register for Upcoming DOE Webinar About On-Bill Financing

Sign up to attend the DOE State and Local Energy Efficiency Action Network (SEE Action) webinar, "Case Studies: Financing Energy Improvements on Utility Bills," taking place June 11, 2014, from 2:00 to 3:30 p.m. Eastern. To learn more on this topic, read

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- Better Buildings Network View
- Peer Exchange Call Schedule and Archive
- Peer Exchange Archive: Marketing and Outreach
- Peer Exchange Archive: Workforce Business Partners

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### Home Energy Pros

Home Energy Pros was founded by the developers of Home Energy Saver Pro (sponsored by the U.S. Department of Energy,) and brought to you in partnership with Home Energy magazine.

### Latest Activity

[What brings you here?](#)

[Share](#) 140

[Tucker Henne](#) commented on [David Byrne's blog post Does Aereoseal work? An auditors review](#)

"I would like to begin with a disclaimer that I am an Aereoseal contractor. One of the reasons I..."

16 minutes ago

[TJ Alexander](#) posted a blog post

**So many homes have fiberglass insulation that is poorly installed in New Hampshire and elsewhere**

Doing testing of existing homes it is typical to see mottled patterns of surface temperatures with...

See More

1 hour ago

[CleanEdison](#) updated an event

[CleanEdison](#) updated an event



**Entry Level Solar Photovoltaic at Cotuit, MA**

September 30, 2012 to

# Peer Exchange Call Series

- There are currently 6 Peer Exchange call series:
  - Data & Evaluation
  - Financing & Revenue
  - Marketing & Outreach
  - Multifamily/ Low-Income Housing
  - Program Sustainability
  - Workforce/ Business Partners
- Calls are held the 2nd and 4th Thursday of every month at 12:30 and 3:00 ET
- Upcoming calls:
  - July 24: Financing - Effective Loan Program Design and Integration with Contractors
  - August 14: Program Sustainability – Mastermind
  - August 14: Workforce - Home Performance Training & Mentoring: Lessons and Resources
- Send call topic ideas or requests to be added to additional call series distribution lists to [peerexchange@rossstrategic.com](mailto:peerexchange@rossstrategic.com)

# **Designing a Cost-Effective Database: Lessons Learned from the Connecticut Neighbor to Neighbor Pilot**

**Jenna Zelenetz, Empower Efficiency (Connecticut  
Neighbor to Neighbor)**

# **Designing a Cost-Effective Database:** Lessons Learned from the Connecticut Neighbor to Neighbor Pilot

Jenna Zelenetz, Data Manager  
Salesforce.com Certified Developer  
July 24, 2014



# CT Neighbor to Neighbor Energy Challenge

- Prove that community-based strategies are a cost-effective way to drive demand for residential upgrades
- Prove that investing in state-of-the-art data tracking systems improve community-based program results



*CT. Gov. Malloy  
announces N2N*

## ***Test, Learn, Adapt***

- Integrated Technology Platform
- Program Dashboards and Weekly Report Reviews
- Cost Effectiveness Modeling
- Behavioral Research and Solid Program Evaluation

## **Robust, Flexible Tracking Database**

- Customizable architecture, fields, and workflow automation
- Integration with web forms, surveys, and contractor portals
- Report and dashboard-building capabilities with real-time data

### Survey Questions

Sign me up for: A \$75 home energy assessment valued at \$750?

Yes

No

I did it!

Are you interested in learning more about:

Insulation

Efficient Appliances

Boiler/Furnace

Water Heaters

Solar Hot Water

Solar PV

Back

Next

# N2N Summary Dashboard

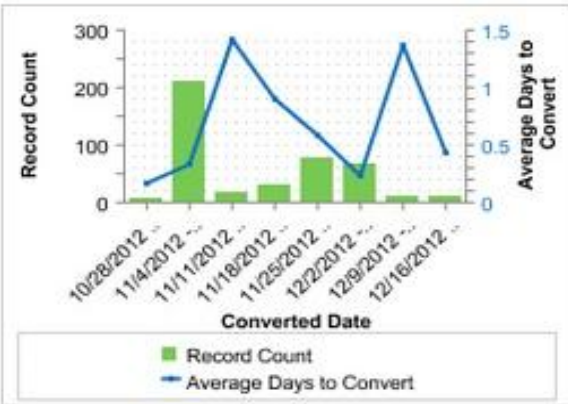
Find a dashboard...

Edit Clone Refresh As of December 20, 2012 at 1:58 PM

## Unconverted Leads

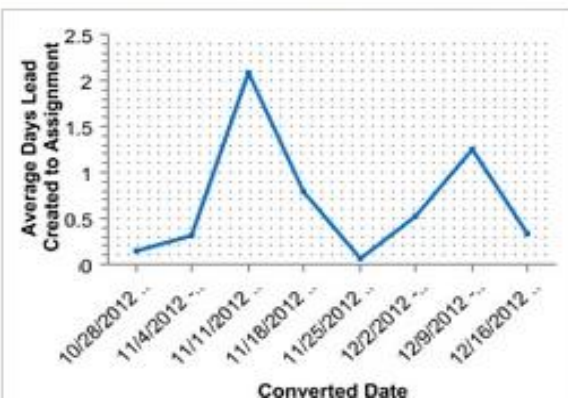
Full Name	Interest	Lead Age	Record Count
<b>Total</b>			<b>0</b>

## Converted Web Leads Summary



This & Last Month

## Average Days to Assign to Contractor

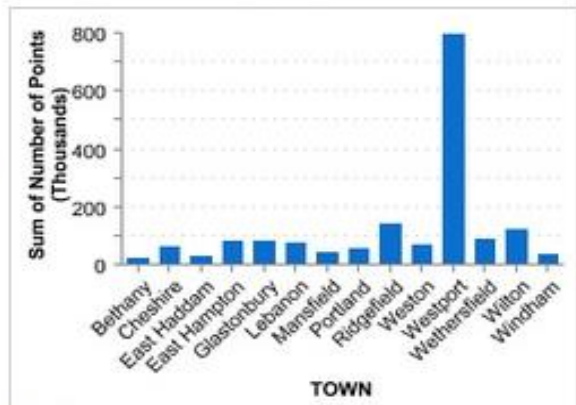


## Open Projects by Type

Project Record Type	Record Count
HES Assessment	359
HES Improvement	228
IE: HES Assessment	225
IE: HES Improvement	6
Lighting Retrofit	4
Solar Hot Water Improvement	14
Solar PV Improvement	210
<b>Total</b>	<b>1K</b>

All Open Projects

## Earned Points by Town



All Time

## Open HES Assessments by Owner

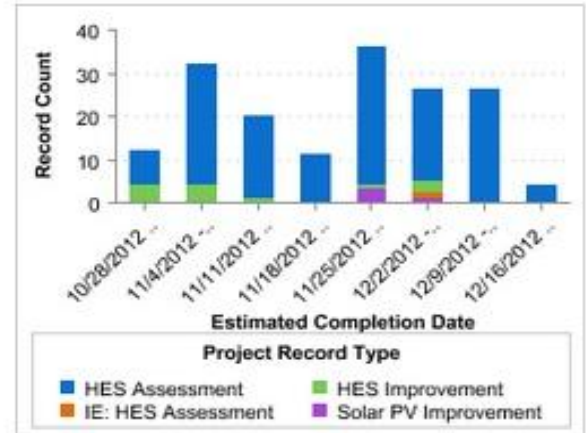
Project Owner	Record Count
Advis. CDI	

## Completed HES Improvement Projects



This Calendar Year

## Projects Completed by Type



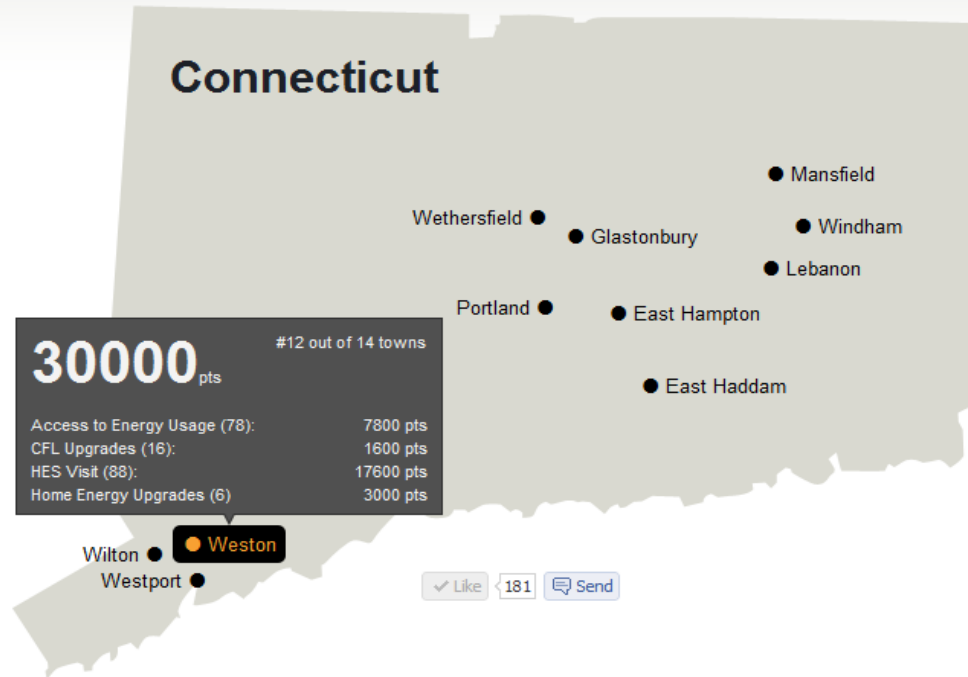
This & Last Month

## Average Age of Completed HES Assessments

## Monthly Contractor Scorecard

HES Savings Data (9/1/11 to 11/30/12)	Project Owner									Grand Total OR Program Average
	1	2	3	6	7	9	10	11		
# Visits w/ Savings Data	60	53	45	207	93	333	108	173		<b>1221</b>
Avg % Savings from HES	8.3%	7.2%	8.1%	7.5%	11.7%	9.3%	8.4%	9.3%		<b>8.9%</b>
Savings >15% (% of visits)	7%	8%	0%	7%	25%	11%	9%	13%		<b>11%</b>
Bids and Upgrades										
Bids Delivered	14	26	28	94	38	92	22	24		<b>368</b>
Bid Rate	12%	36%	44%	31%	24%	20%	13%	12%		<b>21%</b>
Upgrades from HES Leads	7	1	4	16	17	50	7	11		<b>120</b>
Total Completed Upgrades	11	1	3	19	18	62	8	11		<b>146</b>
Upgrade % (of bid)	50%	4%	14%	17%	45%	54%	32%	46%		<b>33%</b>
Upgrade % (of HES)	6%	1%	6%	5%	11%	11%	4%	6%		<b>7%</b>

## Towns in The Energy Challenge



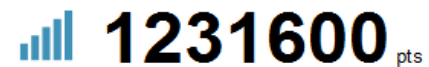
## Leaderboard

Towns Community Groups

### 👑 Westport

#	Town	Points
1.	Westport	558,000
2.	Ridgefield	111,500
3.	Wilton	101,100
4.	Lebanon	69,800
5.	Wethersfield	69,800
6.	Glastonbury	60,800
7.	East Hampton	47,200
8.	Cheshire	46,300
9.	Mansfield	33,700
10.	Portland	33,100
11.	Windham	31,900
12.	Weston	30,000
13.	East Haddam	22,900
14.	Bethany	15,500

## Challenge Stats



Participating Towns: 14

# Evaluating Cost Effectiveness

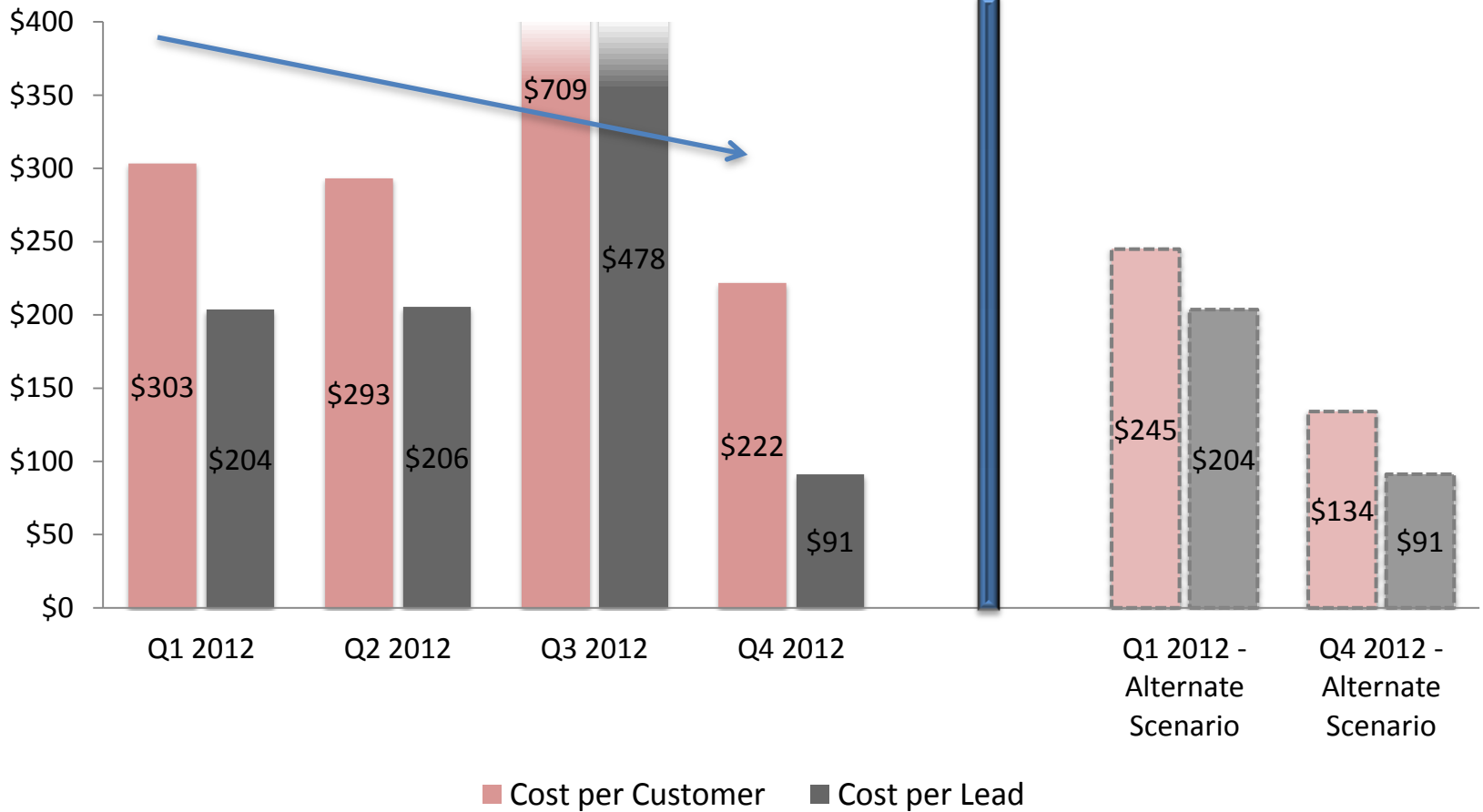
- Created program cost-effectiveness modeling tool for more robust performance metrics
- Used participant data and pulled in program administration and staff costs
- Calculates staff hours and cost for program action or energy savings by outreach activity
- Allows scenario modeling for future programs

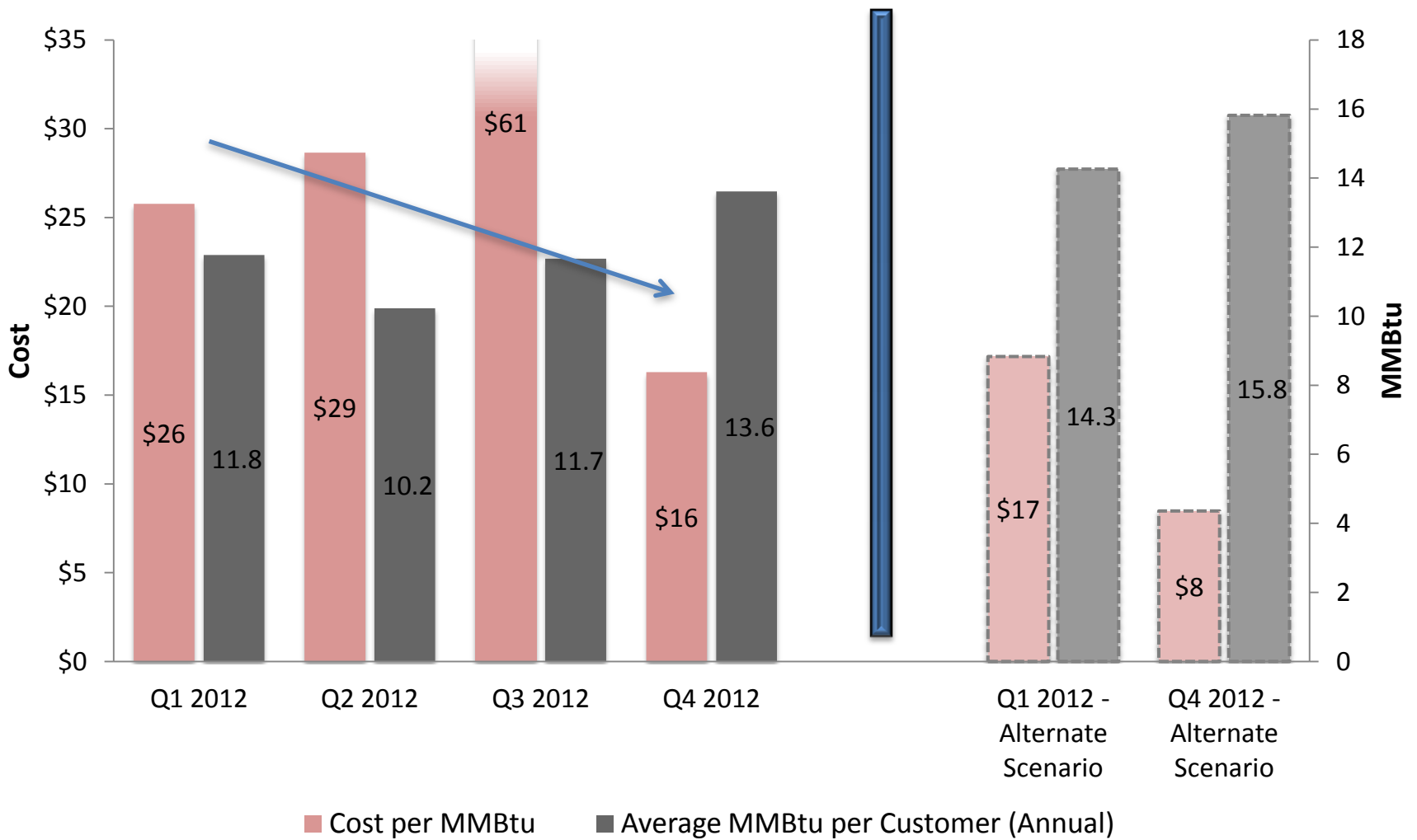


Cost Effectiveness by Strategy (\$/HES visit)								
		2011 ACTUALS				2012		
		Q1	Q2	Q3	Q4	Q1	Q2	Q3
Festival	High	\$ 257.21	\$ 116.92	\$ 110.23	\$ 128.61	\$ 330.70	\$ 214.35	\$ 190.79
Business organization	Medium		\$ 108.82	\$ -		\$ 136.03	\$ 12.09	
Coalition partner meetings	Medium	\$ 466.38	\$ 151.14	\$ 187.96	\$ 151.14	\$ 197.49	\$ 116.59	\$ 81.62
Web sign-ups	Passive	\$ 3.46	\$ 0.40	\$ 0.25	\$ 0.20	\$ 0.11	\$ 0.22	\$ 0.49
Workshops	High	\$ 362.74	\$ 122.77	\$ 72.55	\$ 68.01	\$ 101.57	\$ 31.09	\$ 79.64
Other	Medium		\$ -			\$ 59.36		\$ -
Election	High	\$ -	\$ 161.11		\$ 84.39	\$ 12.74	\$ 38.89	\$ 55.12
Call-in sign ups	Passive	\$ 17.81	\$ 5.94	\$ 1.27	\$ 0.89	\$ 1.98	\$ 1.37	\$ 2.97
Call nights	Medium						\$ 34.63	
Tabling	High	\$ 395.71	\$ 257.55	\$ 286.31	\$ 121.61	\$ 113.55	\$ 209.82	\$ 104.64
Mail-In	Passive		\$ 2.47	\$ 4.95	\$ 1.24	\$ 2.47	\$ 4.95	
Presentation to Other Non-Coalition Partner	Medium				\$ 326.46	\$ 399.01	\$ 204.04	\$ 108.82
Distro	High		\$ 128.61	\$ 192.91	\$ 51.44	\$ 64.30		
Canvassing	High		\$ 267.11	\$ 296.79		\$ 890.36	\$ 254.97	\$ 133.55
Mailing/Flyer	Passive			\$ 42.54		\$ 5.80	\$ 6.00	\$ -
General Coalition Outreach	Medium	\$ 22.39	\$ 6.81	\$ 9.72	\$ 15.41	\$ 14.35	\$ 24.62	\$ 88.27
Participant Referral	Passive	\$ 1.98	\$ 0.15	\$ 0.25	\$ 0.40	\$ 0.09	\$ 0.14	\$ 0.66
Permanent Display	Passive			\$ 29.68	\$ 13.19	\$ 49.46	\$ 24.73	\$ 19.79
Home	Passive	\$ 217.64	\$ 108.82	\$ 435.29	\$ 435.29	\$ 957.63	\$ 48.37	\$ -
Task Force meeting	Medium		\$ 408.08	\$ 489.70	\$ 1,741.15	\$ 1,958.79		
Contractor generated	Passive	\$ 0.68	\$ 0.62	\$ 0.91	\$ 0.40	\$ 0.34	\$ 0.38	\$ 1.15

Hours per Upgrade Complete Sign Up-- by Strategy (Pull through)

		2011 ACTUALS				2012		
		Q1	Q2	Q3	Q4	Q1	Q2	Q3
Festival	High			30.87	30.87	92.60		
Coalition partner meetings	Medium	65.29	217.64		54.41		65.29	
Web sign-ups	Passive		0.28	0.18	0.09	0.08	0.11	0.55
Workshops	High	43.53	191.53	34.82	21.76	30.47	8.71	21.24
Election	High		90.22			30.07	11.28	15.43
Call-in sign ups	Passive				0.24	0.47	0.24	
Tabling	High	142.46	607.82		49.86	208.94	120.30	108.82





# Recommendations

When developing a data management platform,  
important to be:

- Thorough
- Anticipatory
- Flexible
- Realistic
- Rigorous

# Connecticut Neighbor to Neighbor Program Data Tracking System Lessons

- Thoroughly outline what data you need upfront, and then invest in the right tool to track it over time
  - Some metrics weren't built into Connecticut's tracking system at the beginning; this resulted in rework
- Don't paint yourself into a corner with complicated analysis—use data fields and validation rules to avoid errors
- Monitor and clean up your data regularly to make sure you're getting what you want out of the system
- Design your data tracking and evaluation system with the scientific method in mind (i.e., with a clear strategy for testing and learning from different experiences)
  - Connecticut's cost-effectiveness model allowed the program to create “best case scenarios” and identify the most cost-effective approaches across the 14 participating communities

**Data Tracking Systems Lessons  
Learned:  
Kathryn Eggers, Elevate Energy**

# BBRN Peer Exchange

Data & Evaluation: Cost-Effective,  
Customer-Focused and Contractor-  
Focused Data Tracking Systems

July 2014



**ELEVATE** ENERGY

Smarter energy use for all

[ElevateEnergy.org](http://ElevateEnergy.org)



## Our Mission

---

We promote smarter energy use for all.



We give people the resources they need to make informed energy choices.



We design and implement efficiency programs that lower costs, and protect the environment.



We ensure the benefits of energy efficiency reach those who need them most.





# ENERGY IMPACT ILLINOIS

---

- Mitigating barriers to energy efficiency retrofitting activities for residential, multifamily, and commercial building sectors
  - Access to information
  - Access to finance
  - Access to a trained workforce
- Launched with funding from US Department of Energy Better Buildings Neighborhood Program
- Early challenges with single family contractors
  - Inconsistent assessment reports across companies
  - Modeling savings to meet Illinois Home Performance with ENERGY STAR and DOE reporting requirements

## How much energy does your single-family home *really* use?

### 2 Choose improvements that are right for you

There are many home improvements that can help you reduce the energy usage of your home. Let us help you choose ones that work for you.

**Improve Your Result**

Even with as much information as we have your home and you know more about it than we. Refine our profile for accurate recommendations.

Recommendation	Year	Est. Cost	Est. Savings	Payback
1. Replace Old Appliances with ENERGY STAR Models	1 year	\$400	\$1 - \$1	None
2. Adjust Your Thermostat Based on Outside Temperatures	1 year	\$0	\$1 - \$1	None
3. Use and Turn Off Power Strips	2 years	\$0	\$1 - \$1	None
4. Air Seal and Insulate Your Attic	1 - 3 years	\$100	\$400 - \$1,000	1 - 3 years
5. Air Seal around Windows, Doors, and other penetrations	1 - 3 years	\$200	\$600 - \$800	1 - 3 years
6. Air Seal and Insulate the Basement	1 - 3 years	\$100	\$200 - \$1,000	1 - 3 years

**START HERE**

Enter Your Address.

Search

example: 123 Main St. Riverside, IL

### Save money and live more comfortably by lowering your energy usage

Understanding your actual energy usage is the first step in making your home more comfortable, efficient, and valuable. We'll recommend home improvements that have both immediate and long lasting impact and then we'll help you with the details of making the change. That's why we're here.

MyHomeEQ is only available for single family homes in Northern Illinois. For more information saving energy in a condo or apartment, review the Ways to Save at Energy Impact Illinois.

#### How This Works

1. Find Your Home Energy Usage
2. Select Home Improvements that are Right For You
3. Choose a Contractor and Let Us Contact Them for You

Potential Energy Savings/Year  
BASED UPON ZIP CODE 60617

**\$151**

WHAT IS THIS?

Your Home EQ Score

**EQ 197**

WHAT IS THIS?

Rebates and Tax Credits



It's simple. A more energy efficient home means a lower MyHomeEQ and bill. That also means a cozier home with better efficiency.

WHAT IS THIS?



# To assist contractors we added a contractor tool to MyHomeEQ

**My Home EQ** Improving the Value, Comfort and Energy Savings of Your Home

Need help? Call 855-9-IMPACT | [BLOG](#) | [ABOUT](#) | [FAQs](#) | [Like](#)

Hello *katie levin!* | [My Account](#) | [LOG OUT](#)

## My HomeEQ Account

### My Assessment Forms

+ Create a new assessment form



Luke Skywalker  
123 Main St, Naperville IL

[Open Form](#)  
[Delete](#)

Fred Flinstone  
123 Rock Cut Rd, Chicago IL

[Open Form](#)  
[Delete](#)

Ferris Bueller  
123 Green St, Glencoe IL

[Open Form](#)  
[Delete](#)



# Sections are nearly all drop down options, making form easier and faster to complete

**Home Energy Assessment for Energy Impact Illinois Rebates**

- Registration
- Home Data
- Property & Equipment**
- Blower Door Test
- Combustion Test
- Basic Package
- Rebate Worksheet
- Package Cost
- Optional Package
- Download PDF

### Home Characteristics

Home Type \*  
Bungalow

**Bungalow**  
One and a half stories, connecting rooms without

### Existing Property & Equipment Conditions

Building Components	Description/Type	Current Conditions	R-Value
Air Sealing (attic or roof cavity)		✓ Poor	
Insulation (attic or roof cavity)		Average	
Wall Insulation		Good	
Crawl Space/Basement Insulation		New	
Windows		N/A	
Other:			
Air Conditioning			
Water Heater(s)			
Boiler/Furnace(s)			

Buttons: Save and Go to Previous Section, Save, Save and Go to Next Section

### Blower Door Test Results

A blower door test measures how much air moves in and out of your home, in "cubic feet per minute", or CFM. Too much air movement in/out of a home is the most common cause of high energy costs, drafts and air quality issues.

CFM:

Building Volume (CuFt):

Rating:  Major Savings Potential

Primary areas for improvement:

Buttons: Save and Go to Previous Section, Save, Save and Go to Next Section



# Basic Option is meant to cover measures required for Illinois Home Performance with ENERGY STAR

## Home Energy Assessment for Energy Impact Illinois Rebates

- Registration
- Home Data
- Property & Equipment
- Blower Door Test
- Combustion Test
- **Basic Package**
- Rebate Worksheet
- Package Cost
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- Download PDF

Save and Close

### Basic Option: Recommended Improvement Package

This option is meant to include the most cost-effective energy saving improvements for your home while also making the project eligible for available rebates and IHP Silver Certification.

These are the improvements identified by the MyHomeEQ energy model. You may uncheck any suggested improvement and it will not be included in the final PDF document.

Improvement	Estimated Cost	Estimated Annual Savings *
<input checked="" type="checkbox"/> Air Seal and Insulate Your Attic	\$ 2145	\$ 128
<input type="checkbox"/> Test & Repair Leaky Ducts	\$	\$ 188
<input checked="" type="checkbox"/> Air-Seal around Windows, Doors, and other penetrations	\$ 650	\$ 275
<input type="checkbox"/> Air-Seal and Insulate Above Ground Walls	\$	\$ 385
<input type="checkbox"/> Air Seal and Insulate the Basement	\$	\$ 156
<input type="checkbox"/> Replace Your Air Conditioner	\$	\$ 36
<input type="checkbox"/> Replace Your Boiler	\$	\$ 458
<input type="checkbox"/> Replace Your Furnace	\$	\$ 319
<b>TOTAL</b>	<b>\$2795</b>	<b>\$403</b>

Save and Go to Previous Section

Save

Save and Go to Next Section



# Optional Package allows addition of further home improvement suggestions for the project

## Home Energy Assessment for Energy Impact Illinois Rebates

- ◊ Registration
- ◊ Home Data
- ◊ Property & Equipment
- ◊ Blower Door Test
- ◊ Combustion Test
- ◊ Basic Package
- ◊ Rebate Worksheet
- ◊ Package Cost
- **Optional Package**
- ◊ Download PDF

Save and Close

### Optional Package: Additional Opportunities

If you are interested in aiming for even more energy savings, here are some additional opportunities to consider along with the above Basic Recommended Improvement

Improvement	Estimated Cost	Estimated Annual Savings *
1. <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
2. <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
3. <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
4. <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>

Save and Go to Previous Section

Save

Save and Go to Next Section



# Automatically calculates rebate amounts using total cost & square footage

## Home Energy Assessment for Energy Impact Illinois Rebates

- Registration
- Home Data
- Property & Equipment
- Blower Door Test
- Combustion Test
- Basic Package
- **Rebate Worksheet**
- Package Cost
- Optional Package
- Download PDF

Save and Close

### Rebate Calculation Worksheet

1. Total Cost for Eligible Energy Efficiency Measures of Project \$ 2100

2. Total Rebate Amount \$ 1470  
*0.7 x Rebate eligible cost capped at \$1750*

3. Square Feet of Attic Insulation Installed 1800  
Existing insulation was R19 or less, improved to R38+, meeting utility eligibility requirements

4. Choose Gas Utility Peoples Gas

5. Gas Utility Rebate \$ 540  
Peoples Gas:  $\$0.30 \times \text{Sq ft insulated}$   
North Shore Gas  $\$0.10 \times \text{Sq ft insulated}$

If no Peoples/North Shore rebate, please explain circumstances  
(note: Gas utility rebate must be used if eligible)

6. Energy Impact Illinois Rebate \$ 930  
Total Rebate Amount – Peoples/North Shore Rebate

Save and Go to Previous Section

Save

Save and Go to Next Section

Automatically calibrated based on "Total Cost for Eligible Energy"

Automatically calibrated based on "Square Feet of Attic Insulation Installed"

Total EI2 rebate



# Creates a PDFs to send to homeowner

## ENERGY IMPACT ILLINOIS

### Home Energy Assessment for Energy Impact Illinois Rebates

<b>Home Owner</b> [REDACTED]	<b>Home Address, City</b> [REDACTED]	<b>Date of Assessment</b> 07/31/2012
<b>Company Name</b> CNT Energy	<b>Energy Analyst</b> Jacqueline Wiese	<b>Analyst Phone</b> (773) 269-2216

### Path to Energy Efficiency

- Step 1: Energy Assessment – Complete
- Step 2: Choose energy improvements and schedule work with contractor
- Step 3: Contractor completes work and applies for rebates
- Step 4: Enjoy lower bills and a more comfortable, valuable home

### Step 2: Choose Improvements and schedule work

This report summarizes what the contractor learned about your home, shows recommended improvements, their costs and benefits, as well as any rebates you may be eligible for. Act quickly; there is a limited quantity of rebates. If your out-of-pocket expenses exceed \$2,500, you may also be eligible for special 0% financing from a participating lender.

Your recommended package of improvements will help you save up to \$ 173 each year in energy costs.

If you make these improvements, your home will also be eligible for an Illinois Home Performance with ENERGY STAR® certificate. This can be included with your real estate listing when you sell the home, helping buyers know your home is more comfortable and will have lower monthly bills.

If you have any questions about this report, the rebates or financing you may be eligible for, contact the energy analyst listed above, or call Energy Impact Illinois at 1-855-9-IMPACT.

### Existing Property & Equipment Conditions

Building Components	Description/Type	Current Conditions	R-Value
Air Sealing (attic or roof cavity)	none		
Insulation (attic or roof cavity)		Poor	None
Wall Insulation	none		
Crawl Space/Basement Insulation			
Windows			
Other:			
Air Conditioning	15 years old	Poor	
Water Heater(s)			
Boiler/Furnace(s)	20 years old	Poor	

### Additional Home Characteristics For Energy Savings Model

### Blower Door Test Results

A blower door test measures how much air moves in and out of your home, in "cubic feet per minute", or CFM. Too much air movement in/out of a home is the most common cause of high energy costs, drafts and air quality issues.

<b>CFM</b>	3092
<b>Building Volume (CuFt)</b>	76050
<b>Rating</b>	Major Savings Potential

### Primary areas for improvement

### Combustion Safety Test Results

We tested your appliances to ensure they're venting correctly.

Combustion Appliances	Safety Test
Heating System Furnace	Pass/Safe
Domestic hot water heater	Pass/Safe
Other	

### Recommendation

Your combustion appliances are venting correctly. Maintain this status by having them cleaned and tuned annually by a professional.

### Basic Option: Recommended Improvement Package

This option is meant to include the most cost-effective energy saving improvements for your home while also making the project eligible for available rebates and IHP Silver Certification.

Improvement	Estimated Cost	Estimated Annual Savings*
Air Seal and Insulate Your Attic	\$	\$61
Air-Seal around Windows, Doors, and other penetrations	\$	\$112
<b>TOTAL</b>		<b>\$173</b>

### TOTAL Basic Recommended Package Cost with Rebates

Total project cost before rebates	\$2600
Utility Insulation Rebate	\$101
Energy Impact Illinois Air Sealing Rebate	\$1649
Other rebate amount	\$
<b>Total cost to homeowner</b>	<b>\$850</b>

**TOTAL recommended basic Improvements will save**

761 kWh      7.03% on electricity and  
863 therms      27.60% on natural gas annually

Total current energy use      349.61 MMBtu  
Total energy saved      88.90 MMBtu      25.43%

Estimates were calculated using the Modeled Savings method using the MyHomeEQ + HESPro model.

### Additional Information

### Optional Package: Additional Opportunities

If you are interested in aiming for even more energy savings, here are some additional opportunities to consider along with the above Basic Recommended Improvement

Improvement	Estimated Cost	Estimated Annual Savings*
1.	\$	\$
2.	\$	\$
3.	\$	\$
4.	\$	\$

Please call 855-9-IMPACT at any time with questions and concerns. Thank you for your interest in energy efficiency.



# Illinois Contractor Reporting and Tracking System Experiences

- Contractors working with Energy Impact Illinois produced widely varied assessment reports, ranging from ½-page invoices to much more comprehensive energy assessment reports
- The program wanted to develop an easy-to-use process by which contractors could produce consistent, high-quality assessment reports that met the program's needs
- Strategies the program used included:
  - Developing an on-line interface for contractors to enter data for assessments
  - Coordinating with the utility to access utility bill data (homeowners must also sign a permission form)
  - Drawing in basic info from the tax assessor records (e.g., square footage)
  - Developing a basic package of pre-selected energy upgrade measures the program recommended contractors use, with options for contractors to tailor it
  - Including estimated energy use savings and estimated rebates in the interface, as well as a report that could be provided to homeowners
- Contractors provide other forms to the program in addition to the report

# Discussion Questions

- What data tracking systems have you tried?
- What are some attributes of a good data tracking system? What are some potential shortcomings?
- What advantages do tracking systems bring?
- What challenges have you encountered with data tracking systems? How did you overcome them?
- Other questions/issues related to data tracking systems?

# Discussion: Data Tracking Approaches and Lessons

- Several programs are using customer relationship management (CRM) systems (SugarCRM, Salesforce, etc.) for data tracking and customer and/or contractor management
  - Customizing off-the-shelf CRM systems for energy efficiency requires a significant amount of staff time and effort, but many programs have found the investment to be worth it
- The Clinton Foundation has a proprietary tablet app that allows employees at companies to schedule energy assessments and produces a 1-pager for the auditor with basic info about the home
- Low-tech strategies are also helpful:
  - The Center for Sustainable Energy (CSE) in California focuses on building face-to-face connections through workshops, where homeowners can set up appointments with contractors directly
  - Regardless of the system, a commonly cited best practice is *make it as simple as possible for contractors (or customers)*

# Discussion: Data Tracking Approaches and Lessons (continued)

- HPXML (Home Performance XML, a data transfer standard for the home performance industry) could make it possible to reduce the time different participants spend recollecting the same data
- HPXML is being mapped to DOE's Building for Environmental and Economic Sustainability (BEES) software, so there will be a common language
- Currently programs and their partners spend a lot of time collecting data, and there isn't a lot of repurposing/sharing of data

# Future Call Topics Poll

- Which of the following topics are of interest for future data and evaluation peer exchange calls?
  - Low income program data and evaluation practices: 57%
  - Developing a benchmarking plan: templates, tools, and data: 57%
  - Program management and audit software: 29%
  - Evaluating whether there are increases in real estate values from EE: 14%

*If you would like to share your experiences on a call or have other ideas for a call topic, contact [peerexchange@rossstrategic.com](mailto:peerexchange@rossstrategic.com).*