



**Better Buildings Residential Workforce/
Business Partners Peer Exchange Call Series:
Contractor Rating and Feedback Systems
*Call Slides and Discussion Summary***

April 24, 2014

Agenda

- Call Logistics and Introductions
- BBRN and Peer Exchange Call Overview
- Featured Speakers
 - Thomas Bregman – Energize New York
 - Laura Parsons – California Center for Sustainable Energy
- Discussion
 - What experiences have you had with contractor rating and feedback systems?
 - What has worked well? What has not worked well? Other lessons?
 - Do you make customer reviews of contractors available to the public? If so, have you put any restrictions on what is shared?
 - How have contractors reacted to the rating/feedback systems? Any backlash?
 - Are there any legal considerations for designing rating systems?
 - Other questions/issues related to contractor rating and feedback systems?
- Future Call Topics Poll

Call Participants

- California Center for Sustainable Energy
- City of Milwaukee (Me2)
- Efficiency Vermont
- Empower Efficiency (Palm Springs, CA)
- Energize NY
- Greater Cincinnati Energy Alliance
- Michigan Saves
- New York State Energy Research and Development Authority
- San Francisco Department of the Environment
- Snohomish County, WA PUD
- Sustainable Connections (Bellingham, WA)

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.

- **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

The screenshot shows a Firefox browser window displaying the Home Energy Pros website. The address bar shows the URL: homeenergypros.lbl.gov/groups/group/show?groupUrl=better-buildings-residential-network. The page features the Better Buildings logo (U.S. DEPARTMENT OF ENERGY) and a description of the network. It includes a 'Members (39)' section with a grid of profile pictures, a 'Discussion Forum' with three posts, and a 'Pages (13)' section. The right sidebar contains sections for 'Home Energy Pros', 'Latest Activity', 'Social Media and Energy Efficiency', and 'Home Energy Ratings'. The bottom of the page shows a 'Main Room' tab and a 'Members Online (5)' indicator.

Better Buildings
U.S. DEPARTMENT OF ENERGY

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

Website: <http://betterbuildings.energy.gov/bbm>
Members: 39
Latest Activity: 6 hours ago

Join the conversations in the discussion forum below. 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

Discussion Forum

Show Your Customers How Much You Love Energy Efficiency
Valentine's Day is February 14. Is your organization celebrating the day with any thematic marketing campaigns? If you are looking for tips on using events to garner program interest, check out the Peer Exchange Call from November 2013, "Leveraging Holidays and Other Events."
[Continue](#)
Started by Better Buildings Support 6 hours ago.

Invite Your Colleagues to Join Home Energy Pros
We look forward to your participation in the Better Buildings Residential Network group. If you haven't already, [invite your colleagues](#) to join the conversation too.
[Continue](#)
Started by Better Buildings Support on Tuesday.

Help Your Customers Understand Heating Systems With Infographic
DOE's latest [Energy Saver 101 infographic](#) helps you share with your customers everything they need to know about home heating—from how heating systems work and the different types on the market to what to look for when replacing a system and proper maintenance....
[Continue](#)
Started by Better Buildings Support Jan 31.

Attend "Overcoming Persistent Barriers to Energy Efficiency in Multifamily Housing through Partnerships" Webinar
DOE's Technical Assistance Program is hosting a webinar addressing how through partnerships state energy offices can play a key role in enhancing and supporting

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

Elizabeth Snyder joined James Sayers's group

Social Media and Energy Efficiency
Tell us how you reach customers, contractors and others using online social media.
[See More](#)
52 minutes ago
19

Elizabeth Snyder joined Evan Mills's group

Home Energy Ratings
Calculating them; visualizing them; explaining them; selling them ... there is a lot to discuss...
[See More](#)
52 minutes ago
9

Elizabeth Snyder joined Diane Chojnowski's group

Members (39)

[Follow New Members](#)

Pages (13)

- Tools
- Better Buildings Network [View](#)
- Peer Exchange Call Schedule and Archive
- Peer Exchange Archive: [Market](#)

[Main Room](#) Members Online (5)

Peer Exchange Call Series

- There are currently 6 Peer Exchange call series:
 - Data & Evaluation
 - Financing & Revenue
 - Marketing & Outreach
 - Multi-Family/ 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:
 - May 8, 12:30 ET: Program Sustainability: Voluntary Initiatives
 - May 8, 3:00 ET: Multi-Family/Low-Income: Outreach to Multi-Family Landlords and Tenants
 - May 22, 12:30 ET: Data & Evaluation: BBRN Member Reporting
 - May 22, 3:00 ET: Financing: Project Performance Relative to Loan Performance
- Send call topic ideas or requests to be added to additional call series distribution lists to peerexchange@rossstrategic.com.

Contractor Rating/Feedback Systems Lessons Learned: Thomas Bregman, Energize New York



Energize NY Contractor Ratings Index

THOMAS BREGMAN

DIRECTOR, ENERGIZE NY RESIDENTIAL

APRIL 24, 2014

Problem and Solution



- Goal -> Help homeowners overcome EE adoption barriers
- Barrier -> Contractor selection
- Hurdle -> 60+ HP contractors accredited by BPI-NYSERDA
- Plan -> Simplify process of selecting a contractor
- Method -> Create “Energize Comfort Corps” (ECC)
- Tool -> Develop Contractor Ratings Index

Contractor Ratings Index Scoring Criteria



- **Customer Satisfaction Surveys**
 - 10 questions (score 1-5)
 - updated quarterly
 - post-assessment & post-upgrade
- **Number of BPI accreditations**
- **Number of completed HP jobs**
 - ECC eligibility threshold (5 jobs in previous 4 quarters)
 - awards points on a sliding scale
- **Business structure**
 - Highest score - vertically integrated (HVAC, insulation, air sealing, etc.)
 - Intermediate score – general contractor with sub-contractors
 - Lowest score – referral to other contractor

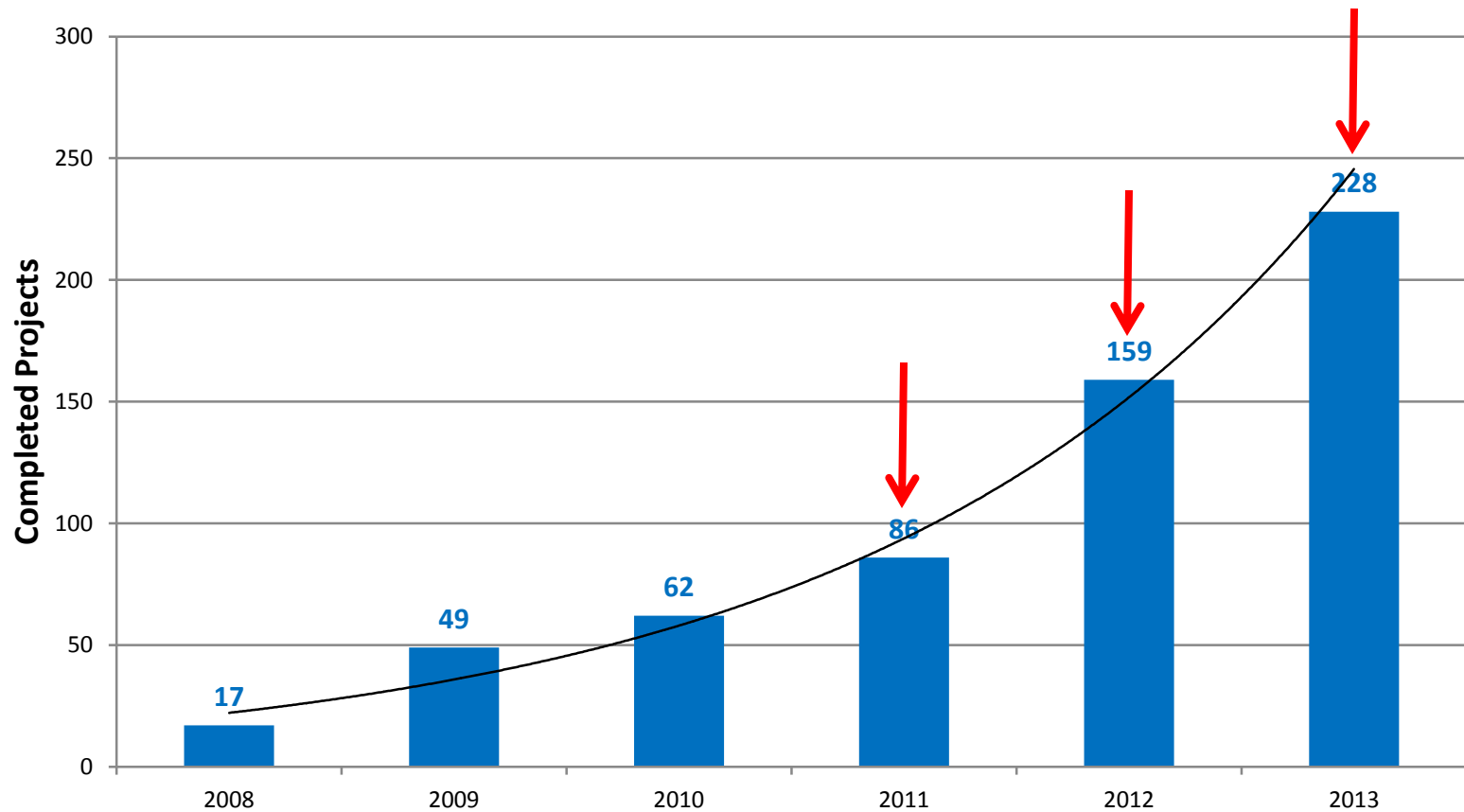
ECC & Contractor Ratings Index Results



- 7 current ECC members
- 404 jobs completed by ECC members*
- 16 other active HP contractors
- 45 jobs completed by other contractors

***Represents 90% of all HP jobs in Westchester**

Energize NY Production Growth



Lessons Learned: Energize NY

- Fewer contractors is better. Customers are overwhelmed by a long list of contractors; the simplified “Energy Comfort Corps” subset of contractors helped homeowners choose.
- Work with active contractors to gather their feedback.
- Don’t overpromise what the rating system will provide – contractors may not always “click” with homeowners, which may not be reflected in ratings.
- Inform homeowners that they still need to perform due diligence by asking contractors questions to select one.
- The rating tool is very helpful for many homeowners. The ten-question survey is the single most important factor incorporated into the ECC rating.

Overcoming Challenges: Energize NY

- There was trepidation from NYSERDA and backlash from contractors over the appearance of recommending specific contractors. However, contractors that are serious about home performance worked hard to make the list.
- The display of numerical rankings on the website can cause confusion (e.g. a contractor rated 4.7 would always be preferable to a 4.2). A categorical rating (e.g., A, B, C rating or AAA, AA, A rating) can help mitigate that problem.
- Energize NY currently uses a 0-5 scale, with a listing of industry certifications and work performed.
- Factoring in performance after upgrades into the ratings would be useful, but would require additional resources.
- Energize NY: <http://energizeny.org/>

**Contractor Rating/Feedback Systems
Lessons Learned:
Laura Parsons
California Center for Sustainable Energy**

Yelp-Style Contractor Reviews

Lessons Learned from the San Diego Hero Alliance, a Better Buildings Pilot Program run by the California Center for Sustainable Energy

Laura Parsons
California Center for Sustainable Energy
www.energycenter.org



BE A HERO IN YOUR HOME ...

Take charge of energy savings

- 1 Take the Pledge ★
- 2 Take the Survey ★★
- 3 Get an Assessment ★
- 4 Upgrade Your Home ★★

Help Us Meet Our Energy Hero Goals

Month

Year



Become an Energy Hero

Latest Tweets

Thanks for RTs @HolisticHomeES and @ccse ☺ #energyheroes ☺
56 min 17 sec ago.

San Diego military/veterans: Last chance to register for FREE June 12 workshop on home energy upgrades & rebates! t.co/8BD1p5hA ☺
1 hour 34 min ago.

The screenshot shows a mobile or tablet view of the Energy Hero website. At the top, it says "BE A HERO IN YOUR HOME ... Take charge of energy savings". Below this is a navigation menu with "Home", "About", "Testimonials", "Be An Energy Hero", and "Blog". A progress bar shows "Level 2: Take the Survey" is the current step. The survey question is "Do you own or rent your current home?*" with options: "Own", "Rent (including military housing)", and "I live in military barracks". Another question is "What type of home do you live in?" with options: "Apartment / Condo / Townhouse", "Single Family Detached House", and "Mobile Home". There are also social media icons for Facebook, Twitter, and LinkedIn, and a "Recruit Your Friends" button. A video player at the bottom shows a video titled "San Diego military/veterans: Last chance to register for FREE June 12 workshop on home energy upgrades & rebates!" with a timestamp of 0:03 / 1:24.



Classic Residential, Inc.

Oceanside, CA

(619) 818-5793

www.classicresidentialinc.com

* This business is veteran owned or employs one or more veterans.

Energy Hero Feedback:

★★★★★ (3 responses)

The test was performed in a very professional, fun and efficient way. The assessor was on time and very nice. After all the recommended measures were completed -upgrade to tankless water heater and... [Read more](#)

MOCARD Inc.

Chula Vista, CA

(619) 426-2096

www.mocardgroup.com

Energy Hero Feedback:

★★★★★ (2 responses)

Just had our home energy assessment today and we were most impressed with the thoroughness and professionalism of the company Mocard Inc.

ASI Hastings Heating and Air

San Diego, CA

(619) 590-9300

www.asiheatingandair.com

* This business gives a military discount (call company for details).

* This business is veteran owned or employs one or more veterans.

Energy Hero Feedback:

★★★☆☆ (4 responses)

ASI did not show for the assessment appointment. Response from ASI Hastings: I sincerely apologize, we have a note in the file that indicates that the customer cancelled this appointment.... [Read more](#)

Del Mar Restoration

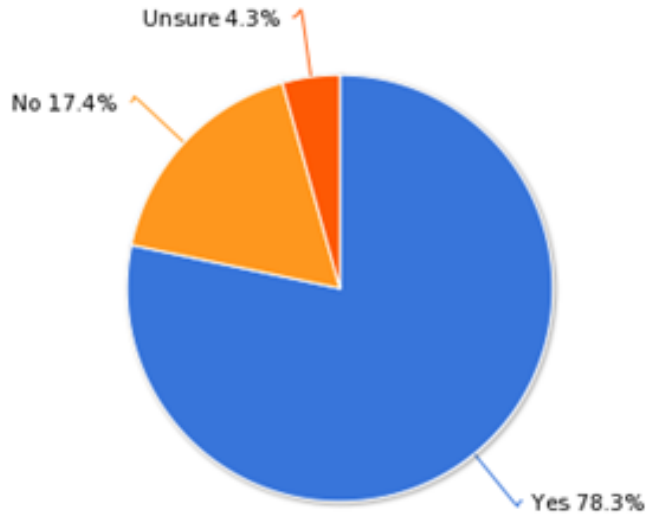
Del Mar, CA

(619) 370-3456

Survey on User Reviews

In December 2012, we sent a survey to the Hero Alliance participants that completed home energy assessments to ask them about the usefulness of the reviews. We received 23 completed responses.

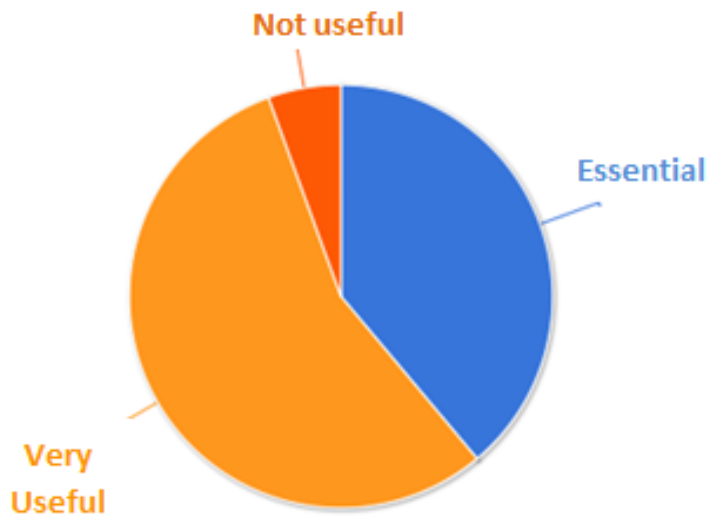
Question 1. When choosing a contractor to perform your home energy assessment, did you use the reviews on the San Diego Hero Alliance website? (www.sdhero.org/contractors)



Value	Count	Percent
Yes	18	78.3%
No	4	17.4%
Unsure	1	4.4%

The five people who selected “no” or “unsure” connected with their contractor at a CCSE workshop, or were referred to the Hero Alliance website by their contractor, and therefore did not use the reviews to choose a contractor. The 18 people that used the reviews answered the next question:

Question 2. When choosing a contractor, how useful were the reviews?



Value	Count	Percent
Essential - I would not have felt comfortable choosing a contractor without seeing reviews	7	38.9%
Very useful - The reviews were an important factor in my choice of contractor	10	55.6%
Somewhat useful - Other factors were more important	0	0.0%
Not useful - The reviews did not factor into my choice of contractor	1	5.6%

Questions

- How do we resolve disputes with contractors that challenge bad reviews?
 - Build consensus with contractors on a dispute-resolution process at the very beginning
 - Possibly have each review expire after 12 months, so no one review will permanently harm a company
 - Make reviews and 5-star ratings only one of several criteria that users can sort by
- How do we ensure respectful and truthful comments?
- How do we avoid liability of possibly appearing to endorse certain companies?

Lessons Learned: Yelp-Style Contractor Reviews in San Diego, CA

- The inclusion of user comments with contractor ratings helped provide a diversity of information, enabling homeowners to select contractors based on the factors most important to them.
- Contractors were able to immediately view and post replies to negative reviews, but if this approach were done at a larger scale, a dispute resolution process might be needed.
- Some contractors were wary of Yelp and some convincing helped assure them that the ratings system would be transparent and fair.
- Moderating comments can use a lot of time and resources (but, California Center for Sustainable Energy did not edit reviews).
- The San Diego Heroes Alliance pilot program ran for nearly a year, and has concluded.

Discussion: Contractor Rating and Feedback Systems

- What experiences have your organizations had with contractor rating and feedback systems?
 - What has worked well? What has not worked well in those systems? Other lessons you've learned?
- Do you make customer reviews of contractors available to the public? If so, have you put any restrictions on what is shared?
- How have contractors reacted to the rating/feedback systems?
 - Has there been any backlash?
 - What steps have you taken to make rating/feedback systems helpful to both customers and (good) contractors?
- Are there any legal considerations for the design of rating systems?
- Other questions/issues related to contractor rating and feedback systems?

Discussion: Contractor Rating and Feedback Systems

- It is not necessary to use customer reviews to refer customers to specific contractors (this can raise liability concerns).
- Some contractors may need to be eliminated from the recommended list if they receive poor reviews – have a process in place.
- Consider waiting until a contractor has a minimum number of reviews before posting any of them.
- A working group of contractors could potentially help establish buy-in to the dispute resolution process.
- Michigan Saves switched from a county-based contractor search to a zip code-based search with 1-5 star rating and customer comments. This helped lower the barrier for homeowners choosing from their database of over 300 contractors.

Discussion: Contractor Rating and Feedback Systems (Continued)

- To further help customers select the appropriate contractor, customer ratings can be incorporated into a tiered system that includes other factors (e.g., number of upgrades completed, pass/fail rate, and days to complete each upgrade).
- Follow-up calls are often necessary to remind customers to fill out surveys, which consumes resources. Energize NY called every customer with a completed upgrade to ask them to post a review. This approach helped collect reviews, but required significant effort.
- Simple surveys can be easier to get customers to fill out quickly (e.g, surveys that focus only on numerical ratings). This can be helpful for programs with large volumes of upgrades.

Future Call Topics Poll

Which of the following topics, if any, are of interest for future Workforce/Peer Exchange calls?

- Lead Generation: Balancing Program and Contractor Roles: 80%
- Engaging Efficiency First Chapters and Other Trade Associations: 80%
- Training and Mentoring Strategies and Resources: 20%
- Incubating New Home Performance Businesses: 0%
- Other ideas: 0%

If you would like to share your experiences on a call or have other ideas for a call topic, contact peerexchange@rossstrategic.com