



**Better Buildings Residential Workforce/ Business
Partners Peer Exchange Call Series:
*Engaging Efficiency First Chapters and Other
Trade Associations in Energy Efficiency Programs***

June 12, 2014

Call Slides and Discussion Summary

Agenda

- Call Logistics and Introductions
- Residential Network and Peer Exchange Call Overview
- Featured Speakers
 - Coby Rudolph – Efficiency First
 - Don MacOdrum – Home Performance Guild of Oregon
 - Josh Notes – GreeNEWit and Efficiency First Maryland-DC
- Discussion
 - What experience has your organization had working with Efficiency First chapters or other trade associations? In what areas has there been collaboration?
 - What strategies have worked well (or not worked well) for EE programs collaborating with trade associations?
 - What ideas or tips do you have to make programs and contractors more effective through trade association partnerships?
 - Other questions/issues related to collaborating with trade associations on EE programs?
- Future Call Topics Poll

Call Participants

- Boulder County, Colorado: EnergySmart
- CalCERTS, Inc. (Folsom, California)
- Better Buildings Greensboro, North Carolina
- CLEAResult (Seattle, Washington)
- Efficiency First
- Efficiency Maine
- GreeNEWit (Maryland)
- Home Performance Guild of Oregon
- International Association of Certified Home Inspectors (InterNACHI)
- Los Angeles County, California
- Midwest Energy Efficiency Alliance (Chicago, Illinois)
- Nexus Energy Center (Huntsville, Alabama)
- Natural Resources Defense Council (San Francisco, California)

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




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/bbrn>


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



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+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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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?

👤 140 [Share](#)

Tucker Henne commented on David Byrne's blog post Does Aeresal work? An auditors review

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

18 minutes ago



T.J 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

Pages (15)

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




CleanEdison updated an event




Entry Level Solar Photovoltaic at Cotuit, MA

September 30, 2012 to

5





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:
 - June 26, 12:30 ET: Multifamily/Low-Income Housing & Data/Evaluation: Cost-Effective Modeling and Savings Projections for Multifamily Projects
 - June 26, 3:00 ET: Marketing & Outreach: Stakeholder Mapping: Identifying Leaders, Target Audiences, and Gaps in Outreach
 - July 10, 12:30 ET: Program Sustainability: Incorporating Behavior Change Efforts into Energy Efficiency Programs
- Send call topic ideas or requests to be added to additional call series distribution lists to peerexchange@rossstrategic.com.

Engaging Efficiency First Chapters and Trade Associations in EE Programs Perspectives & Lessons Learned:

**Coby Rudolph, Chief Operating Officer
Efficiency First**




Better Buildings Webinar

Engaging Efficiency First Chapters and Other Trade
Associations in Energy Efficiency Programs

Coby Rudolph, Efficiency First COO

June 12, 2014





Efficiency First Overview

- 650 member companies
- Home performance contractors, allied trades, energy audit companies, industry vendors and supporters
- 11 state and local chapters... and growing!
- 6 chapters with staff



Membership Support/Value

- Advocacy for industry growth initiatives
- Member education program with peer-to-peer emphasis
- High value member benefits

State Advocacy

- Engaging with EE programs and reducing barriers for companies
- Working on solutions like HPXML, cost effectiveness
- Pushing for sustainable funding for EE projects
- Forward-looking legislation: Financing, energy scores, ...
- Defending challenges to energy efficiency standards
- Developing market-driven models for home performance

Federal Policy

Clean Air Act Section 111-d – Regulate carbon emissions from existing power plants

“Out-side the Fence”, “System-Wide Approach”

the most significant opportunity for energy efficiency advancement in our lifetime

Timeline:

- June 2014 Comment Period
- June 2015 Final Rules Released
- June 2016 State SIPs Developed
- June 2017 Compliance

Engaging with EF Chapters / Contractors Associations

- The key: build a true, ongoing partnership, from the beginning
- Tap for expertise, experience, feedback, assistance with program design and implementation
- Leverage industry investments: With a successful partnership, contractors aren't simply program delivery mechanisms – they are investment partners, leveraging their own resources to create growth

Engaging with EF Chapters / Contractors Associations

- Where there's a current chapter / association:
 - Go to their turf, participate in their meetings, help facilitate them building their own infrastructure
 - Bring them into the decision-making process, as a group – not just as individual contractors
 - Consider ways that they can help achieve specific program deliverables (and help support those efforts)
 - www.encyfirst.org/chapters
- Where there isn't an organization:
 - Identify contractor leaders, gauge their interest in forming an EF chapter/other association
 - Connect them with EF national (www.encyfirst.org)
 - Connect them with other local companies who have also expressed interest.



Thank you!

Coby Rudolph

www.encyfirst.org



**Engaging Efficiency First Chapters and
Trade Associations in EE Programs
Perspectives & Lessons Learned:**

**Don MacOdrom, Executive Director
Home Performance Guild of Oregon**

BB RESIDENTIAL NETWORK CALL:
Engaging Efficiency First Chapters
and Other Trade Associations
in EE Programs

-
June 12, 2014

perspective from the
**Home Performance Guild
of Oregon**

Home Performance Guild of Oregon

- Oregon based 501c6 trade association. Also the Oregon Chapter of Efficiency First.
- Formed in 2009 by a consortium of Home Performance contractors
- Bring together all industry stakeholders through many forums (monthly meetings, newsletters, events)
- Advocate for residential energy efficiency sector with programs, legislators & regulators
- Current areas of special focus:
 - Developing real estate valuation of Home Performance
 - Oregon DOE's statewide home energy performance scoring system
 - Oregon PUC's approach to cost effectiveness

HP Contractors as Industry Engines:

- Still primarily support HP contractors, but represent interests of all industry stakeholders via well supported HP contractors that are doing lots of high quality work
- **When HP contractors are busy doing quality work**
 - manufacturers and suppliers are selling product
 - programs are acquiring savings and are happy with the work their customers are receiving
 - lenders are writing loans
 - technicians and installers are attending trainings
 - SW tool providers are acquiring customers

HPwES Programs in Oregon: Energy Trust of Oregon & Clean Energy Works

Energy Trust of Oregon

- HPwES Sponsor in Oregon
- Manages network of HPwES Trade Allies (HPwES TA's)
- Offers incentives for measures and HPwES assessment
- Conducts Quality Assurance (QA)

Clean Energy Works

- Leverages Energy Trust's Trade Allies & incentives
- Layers on financing, workforce standards, 100% QA
- credited with majority of HPwES projects in Oregon



Advocacy → Cooperation → Collaboration

- The Guild has been instrumental in providing one consolidated voice representing the Home Performance industries' insights to program managers at Energy Trust and Clean Energy Works
- The relationships began with elements of advocacy - with the contractors advocating to legislators, regulators and the programs on program design and implementation
- As the value of contractors' input came to be recognized, the programs opened doors to cooperation and benefited from shrinking feedback loops and expert advice from the field
- These relationships ultimately evolved to one of structured collaboration, with the programs sponsoring the Guild such that they could facilitate contractor/industry engagement

Signs of Highly Productive Industry Engagement:

- contractor input is valued, sought out and streamlined
- collaborative engagement mechanics are developed, implemented, nurtured, refined and exploited
- the voice of contractors & the industry is celebrated

Examples of Program – Trade Association Collaboration

- meeting & event coordination
- stakeholder engagement partnering
- technical specs and program design consultation
- policy making coordination (as appropriate)



THANK YOU!

Home Performance Guild of Oregon

Don MacOdrum, Executive Director

www.hpguild.org



Engaging Efficiency First Chapters and Trade Associations in EE Programs Perspectives & Lessons Learned:

Josh Notes

Chief Operating Officer, GreeNEWit

Steering Committee Member, Efficiency First – Maryland/DC

Discussion and Lessons Learned

- What experience has your organization had working with Efficiency First chapters or other trade associations? In what areas has there been collaboration?
 - Program design / implementation decisions and feedback?
 - Outreach & recruitment of contractors?
 - Marketing & outreach to customers?
 - Training and workforce development?
 - Other?
- What strategies have worked well (or not worked well) for EE programs collaborating with trade associations?
- What ideas or tips do you have to make programs and contractors more effective through trade association partnerships?
- Other questions/issues related to collaborating with trade associations on EE programs?

Discussion and Lessons Learned: Efficiency First

- It is imperative to coordinate with contractors or their industry associations early in program design. Engaging early is important to learn what is needed for contracting businesses to thrive with your program.
- Engaging with contractors is particularly important for meeting job creation goals, and for designing a quality assurance program (Washington State).
- Be ready to gauge how comfortable trade associations are with sharing information with each other. This knowledge-sharing is key to program success.
- All Efficiency First chapters are registered as 501(c)6 organizations (nonprofit business leagues), a designation which allows for political participation.

Home Performance Coalition

- Affordable Comfort, Inc. (ACI) and the National Home Performance Council have merged to form the Home Performance Coalition.
- Together with the Home Performance Coalition, Efficiency First, Building Performance Institute (BPI), and Home Energy Magazine have signed a letter of intent to align their activities, goals, and tactics.
- Efficiency First, along with other organizations, is looking for ways to make energy efficiency more productive, and other improvements.
- For more information, [click here](#).

Discussion and Lessons Learned: Home Performance Guild of Oregon

- Contractors are the engine of the industry. Contractors' business health is a barometer of the home performance industry. When contractors are busy, everyone is doing well. A great relationship with contractors is key.
- When considering joining with an organization like Efficiency First or a Home Performance Guild, programs should evaluate who will help as productive partners.
- Once they have a seat at the table, contractors and trade associations should move quickly away from an “advocacy” role to collaborate with programs regularly through channels for feedback and input.
- Creating the infrastructure for a highly engaged contractor group requires time and effort to establish trust.

Discussion and Lessons Learned: Home Performance Guild of Oregon

- The selection process for contractors operating within Clean Energy Works Oregon is separate from the Home Performance (HP) Guild.
 - Membership in the Oregon HP Guild is entirely open; there are no requirements.
- Trade associations serve a complex dual role in agreements with programs, providing support to programs while also serving as the voice of contractors.
 - This can be a challenge, so some chapters separate association representation from program implementation work.
- Programs should work to build capacity so that the industry can deliver services on its own. This is one indication of a program that works well with its contractor base.
- Clean Energy Works Oregon and contractors were awarded a federal grant that was used to fund Don MacOdrum's position as director of the Oregon HP Guild.

Discussion and Lessons Learned: Engaging Efficiency First Chapters (GreeNEWit)

- In 2009, GreeNEWit became a founding member of Efficiency First Maryland/DC.
- A key factor for success is a collaborative mindset among founding members, rather than focusing on individual benefits.
- Contractor success is the foundation of program success. Completing upgrades is not enough; contractors should be profitable businesses.
- The first six months of a new trade association are critical to success, and it is important to build momentum during that time.

Discussion and Lessons Learned: Engaging Efficiency First Chapters (GreeNEWit)

- Some contractors are concerned about quality standards when new, less-qualified contractors enter the industry. One way to address this is to share lessons learned and best practices to improve newer contractors' work quality.
- Trade associations can help programs with QA by making sure that contractors are aware if there are unsatisfied customers.
- GreeNEWit had success conducting a pilot in which new contractors passed leads to the program, and they distributed a portion of revenue back to them, then reevaluated after six months.
- Efficiency First and other trade associations can provide valuable networking opportunities, as members educate one another on the industry collaboratively.
- Finding a common topic or goal can help to rally local stakeholders and bring in contractors (Washington State).

Future Call Topics Poll

- Which topics would interest you for future Workforce/Business Partner peer exchange calls?
 - Lead Generation and Allocating Leads to Contractors: 57%
 - Home Performance Training and Mentoring: Lessons + Resources: 57%
 - Scaling and Targeting Contractor Support Resources: 43%
 - Assembling Contractor Teams for Whole Home Upgrades: 29%
 - Other ideas: 14%

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