



Better Buildings Residential Network Peer Exchange Call Series: *Coordinating with Corporate and Institutional Affiliates*

Call Slides and Discussion Summary

February 12, 2015

Agenda

- Call Logistics and Introductions
- Opening Poll
- Residential Network and Peer Exchange Call Overview
- Featured Speakers
 - Anne Marie Hertl, Western Michigan Environmental Action Council (WMEAC)
 - Keith Canfield, Home Energy Affordability Loan (HEAL)
- Discussion
 - What opportunities have you found to market energy efficiency upgrades through affiliate partners?
 - What are the advantages of working with “trusted intermediaries” to reach new energy efficiency customers?
 - What challenges have you encountered in working with intermediaries to encourage energy efficiency upgrades? Are there disadvantages to this approach?
 - Other questions/issues related to the topic?
- Closing Poll

Introductions

- Center for Sustainable Energy
- City and County of Denver, Colorado
- Clean Energy Works Oregon
- County of Santa Clara, California
- Energy Efficiency Specialists, LLC
- Greater Cincinnati Energy Alliance
- green | spaces
- Clinton Foundation Home Energy Affordability Loan Program
- Nexus Energy Center
- Western Michigan Environmental Action Council
- NeighborWorks of Western Vermont

Opening Poll Results

- What is your familiarity with working with corporate and institutional affiliate programs?
 - New to learning about working with corporate and institutional affiliate programs – **71%**
 - Somewhat familiar with working with corporate and institutional affiliate programs – **29%**
 - Very familiar with working with corporate and institutional affiliate programs – **0%**
 - Other (please explain) – **0%**

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/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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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

[0](#)

CleanEdison updated an event



Entry Level Solar Photovoltaic at Cotuit, MA

September 30, 2012 to

Peer Exchange Call Series

- Calls are held the 2nd and 4th Thursday of every month at 12:30 and 3:00 ET
- Calls cover a range of topics, including financing & revenue, data & evaluation, business partners, multifamily housing, and marketing & outreach for all stages of program development and implementation
- Upcoming calls:
 - February 26, 12:30 ET : Voluntary Initiative on Incentives: Toolkit Training Webinar
 - February 26, 3:00 ET : Normalizing Weather Data to Calculate Energy Savings
 - March 12, 12:30 ET : Single Family Residential Better Buildings Challenge Webinar
 - March 12, 3:00 ET : Using Mobile Applications to Generate Customer Demand
- Send call topic ideas to peerexchange@rossstrategic.com.

Peer Exchange Call Summaries

Discussion: Challenges and Solutions

- Overcoming Challenges - Solutions:
 - Access trusted, local messengers
 - Engage your satisfied customers as champions to turn them into "lifetime customers"
 - Invite people to make a pledge with a few simple EE activities they can take
 - Connect with the right local partners (Connecticut conducted "community asset mapping")
 - Directly involve the homeowner through DIY work or as energy efficiency demonstration homes to help them feel engaged (San Diego demonstration homes)
 - Minimize paperwork to make it easier to participate

20



Poll Results

Participant Poll: Which of the following best describes your program's experience with energy efficiency behavior change efforts?

- Currently implementing: 31%
- Planning to implement: 31%
- Thinking about it: 19%
- Haven't thought about it: 0%
- Not applicable: 19%

The screenshot shows the Home Energy Pros website interface. At the top, there's a navigation menu with links for Home, Invite, My Page, Members, Forum, Blogs, Groups, Photos, Videos, and Events. Below the navigation, there's a breadcrumb trail: "Back to Better Buildings Residential Network" and "All Better Buildings Residential Network Pages". The main heading is "Peer Exchange Archive: Program Sustainability". Underneath, there are several entries, each with a title, date, and a link to a PDF summary. The entries are: "Incorporating Behavior Change Efforts into Energy Efficiency Programs" (July 10, 2014), "Collaborating with Utilities on Residential Energy Efficiency" (June 12, 2014), "BBRN Voluntary Initiative: Partnering to Enhance Program Capacity" (May 8, 2014), "Complementary Energy and Health Strategies" (April 10, 2014), and "Mastermind: Jim Mikel, Spirit Foundation" (March 13, 2014).

How do you eat an elephant? One bite at a time. A slight shift in perspective goes a long way.

Understanding how EE can solve a financial, public relation, or customer service problem for the utility is the right place to start.

Residential Program Solution Center

Web portal of residential EE upgrade program resources, & lessons learned to plan better, avoid reinventing the wheel.

- BB Neighborhood Program, Home Performance with ENERGY STAR Sponsors+
- Provides:
 - Step-by-step guidance
 - Examples
 - Tools
 - Templates
 - Lessons learned
 - Best practices
 - Tips
- Continually add content to support residential EE upgrade programs—member ideas wanted!



<https://bbnp.pnnl.gov/>

Program Experience: Western Michigan Environmental Action Council

West Michigan Environmental Action Council

BETTER BUILDINGS FOR MICHIGAN – GRAND VALLEY STATE UNIVERSITY



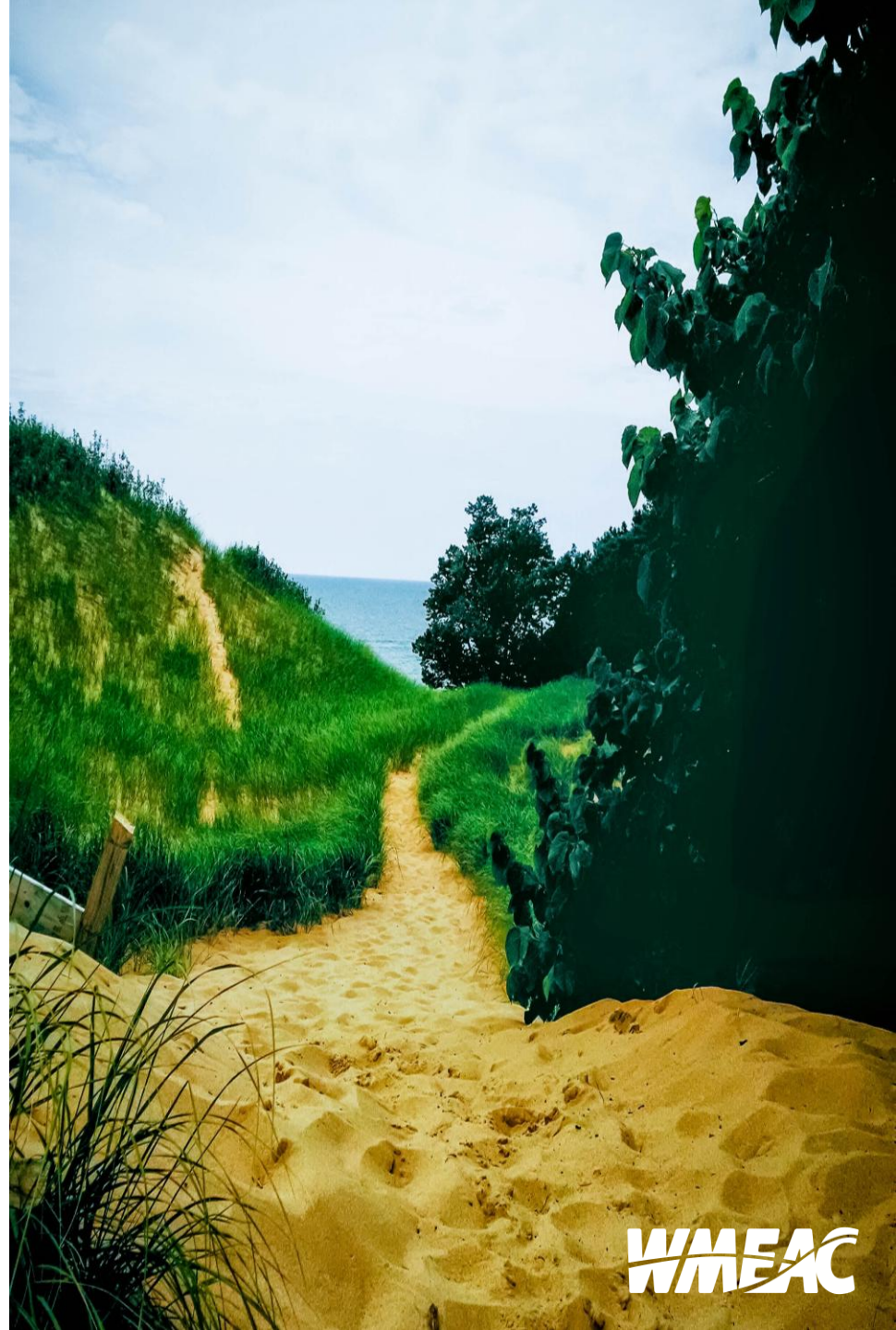
Who is WMEAC?

FOUNDED IN 1968

ENVIRONMENTAL 501C3
ORGANIZATION

FOCUS AREAS:
BUILDING
SUSTAINABLE
COMMUNITIES

PROTECTING WATER
RESOURCES



WMEAC

GRAND VALLEY STATE UNIVERSITY AND BETTER BUILDINGS FOR MICHIGAN



Why organizations?

Organizations are a unique type of social network in that they are trusted by employees in a way that other affiliations are not.





ELEMENTS OF SUCCESS

TRUST

COMMUNICATION

COST EFFECTIVE

INTERNAL CHAMPIONS

INCENTIVES



HELPING GVSU FACULTY & STAFF PLUG INTO SAVINGS

"The contractor checked for safety and found two problems that needed to be fixed right away—I'm really glad we did it."

Dr. Wendy Wenner
Dean for the College
of Interdisciplinary Studies



To learn more about Wendy's
BetterBuildings for Michigan experience
visit her profile at <http://www.bbmgr.org/gvsu/profiles>



HELPING GVSU FACULTY & STAFF PLUG INTO SAVINGS

"This program is yet another sign of GVSU's ongoing commitment to sustainability. Moreover, there is real financial value here, for everyone in our community, not just those living in Grand Rapids."

Tom Haas
GVSU President



To learn more about Tom's
BetterBuildings for Michigan experience
visit his profile at <http://www.bbmgr.org/gvsu/profiles>

WARMER HOMES LOWER UTILITY BILLS!

WARMER HOMES LOWER UTILITY BILLS!



HELPING GVSU FACULTY & STAFF PLUG INTO SAVINGS

"The financial incentives allowed us to make improvements now that were otherwise four to five years down the line. I recommend the home assessment without hesitation."

Justin Pettibone
Professor of Liberal Studies



To learn more about Justin's
BetterBuildings for Michigan experience
visit his profile at <http://www.bbmgr.org/gvsu/profiles>



HELPING GVSU FACULTY & STAFF PLUG INTO SAVINGS

"Before the audit we thought we had to replace all our windows—not so. The audit saved us thousands of dollars!"

Olwen Urquhart
GVSU TRAT Project Manager
Michael Scantebury, Ph.D.
Associate Professor



To learn more about Olwen's and Michael's
BetterBuildings for Michigan experience
visit their profile at <http://www.bbmgr.org/gvsu/profiles>

WARMER HOMES LOWER UTILITY BILLS!

WARMER HOMES LOWER UTILITY BILLS!

Uptake Summary	Inside City Boundary		Outside City Boundary
1. Number of eligible homes	596		2379
2. Number of base packages	45		93
3. Number of additional measures or upgrades (includes LIEEF)	63		22
4. Number of CAA referrals	0		0
Total number of homes served (2+3+4 above)	108		115
Percentage of target population who participated (Total homes served/eligible homes)	18%		10%
Conversion rate from Base Package to Upgrade (includes LIEEF) $((3+4)/\text{total homes served})$	58%		19%

# of instant rebate incentives for additional measures			59
# of MI Saves loans			38
# of interest rate buy-downs for MI Saves loans			38
Total value of loans			\$ 348,504.00
Total homeowner investment			\$ 414,723.00
Total sum of project costs			\$ 534,424.00
Interest rate options	7%	0%	N/A
Number of loans	-	38	-
Average loan amount	-	\$ 9,171.16	-

Contractor Name	Upsell % (includes LIEEF jobs):	Avg upsell job \$	Avg % elec. savings	Avg % nat. gas savings
Contractor A	45%	\$ 9,811.05	10.06%	19.44%
Contractor B	71%	\$ 8,211.73	11.13%	22.20%
Total	59%	\$ 8,718.18	10.79%	21.36%

VARNUM
ATTORNEYS AT LAW

 **Herman Miller**

HAWORTH®





CHAMPIONS ARE
GREAT, BUT
INCENTIVES ARE
BETTER

NON-STARTERS

Does the organization have the ability and interest to invest in incentives?

Can you utilize any easy, free communication channels to promote to employees through the employer?

Do you have an internal champion?

Do you have quality assurance checks on the contractors?



WEST MICHIGAN ENVIRONMENTAL ACTION COUNCIL
ANNE MARIE HERTL, COMMUNITY ACTIVISM MANAGER

*“Energy Efficiency is the cheapest, cleanest, most
quickly deployed source of energy”*



WMEAC Presentation Highlights

- Partnering with Grand Valley State University (GVSU) resulted in an inexpensive and successful outreach campaign, with a high (59%) audit-to-retrofit conversion rate.
- Reasons for Success:
 - GVSU already emphasized sustainability.
 - University employees were well educated and well paid.
 - The University's pre-established communication channels (email, intranet, common spaces, mail cubbies) allowed for a high infiltration rate.
 - Employees received rich project incentives, zero-interest loans, and paid time while receiving their audit.
 - WMEAC identified and worked with energy "champions" in each department and level to build trust and promote word-of-mouth.
- WMEAC did not experience similar success with other partners, with the primary reasons being lower employee income and lack of rich financial incentives. Affiliates need to make an investment to support communication and, if possible, offer incentives.

Example Strategies: Home Energy Affordability Loan (HEAL)



CCI HEAL

home energy affordability loan

AN EMPLOYER SPONSORED
ENERGY BENEFIT PROGRAM

by



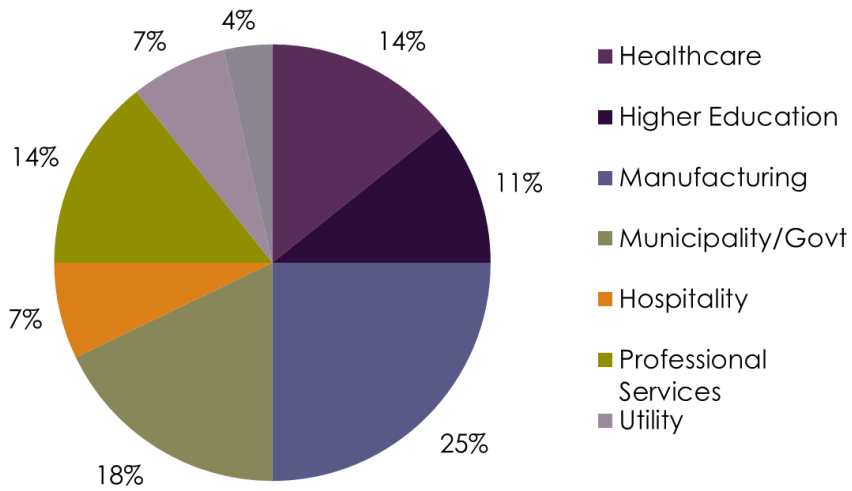
CLINTON CLIMATE INITIATIVE

“The idea behind HEAL is to make workplace retrofits the norm and to create both the demand and the financing for employee residential upgrades.”

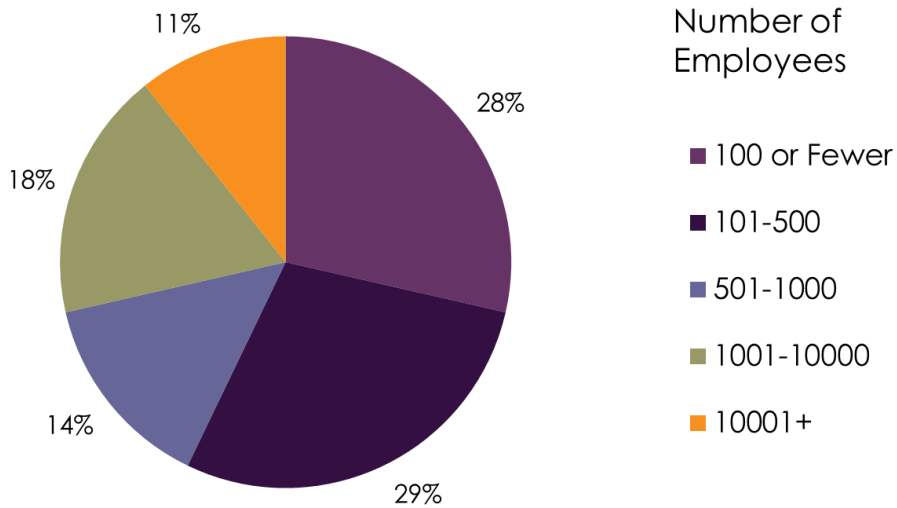
President Bill Clinton, Back to Work, 2011



Employers Offering HEAL Benefit (by Industry Sector)



Employers Offering HEAL Benefit (by Total Employment)



Write Your Ending First

Determine upfront what it will take to convince the next round of stakeholders

Four Key Considerations

1. Who Needs to Be Convinced and Who Do They Respect?
2. What Data Do You Need, How, Where Do You Get It?
3. When to Retell Your Story to Connect Delivered Value?
4. Use Earned Media Sparingly- Don't be a PR Junkie



I. Find Out Who Needs To Be Convinced

How does the organization make decisions?

Sometimes info may need to come from outside the organization

- It's not just the org chart.....



II. Use Specific Stories

Hierarchy: From Organization Within Community Similar Situation

Find peers for each constituency that can speak for you



Allison Streepey
Department Business Administrator
UAMS Educational Development



Tom Butler
Vice Chancellor, Administration & Governmental Affairs
University of Arkansas for Medical Sciences



Sharmin Moody
Program Manager
UAMS Cervical Cancer Education Prevention Program

residential CASE STUDY

"Energy efficiency has always been a concern, and it was a godsend that this program came along. I would highly, highly recommend HEAL!"
- Winfred Batch

Winfred Batch Residence
Little Rock, Arkansas

Home Size: 1,000 Square Feet Built: 1935
Energy Savings:
• BT Investment: 296
• BT Utility Savings: 576/Annually
• BT Average Gas Savings: 390/lt. annually
Retrofits/Costs:
• Air Sealing: 508
• Insulation: 328
• Duct Sealing: 5271
• Lighting: 211
• Appliance Replacement: 841
Total Costs: 2,106
• A/E Appliance Rebate: 207
• EnergyCoop Grant: 2,389
• Total Investment: 1,524
• Net Cost: 332
• Simple Payback: 4.75 Months

Employee Information:
• Employer: UAMS USA
• Location: Little Rock, AR
• Number of Employees: 630

HEAL is a program of the Clinton Foundation. For more information, visit www.clintonfoundation.org.

residential CASE STUDY

"UAMS offers various benefits to the employees, but this benefit is just awesome. This benefit is right up there with health insurance!"
- Shirley Stokes

Shirley Stokes

The Clinton Foundation's Home Energy Affordability Loan (HEAL) program is a pay-for-performance program that provides financial assistance to low-income households to improve their energy efficiency. Shirley Stokes, a UAMS employee, participated in the program and received a \$1,000 loan to improve her home's energy efficiency. The program is a great benefit for employees, and Shirley Stokes is a happy customer.

residence

BT Investment	13,776
BT Utility Savings	2,612/Annually
BT Average Gas Savings	1,722/Annually
Lighting	210
Insulation	330
Air Sealing	516
Duct Sealing	5,271
Appliance Replacement	841
Total Costs	21,056
Net Cost	332
Simple Payback	4.75 Months

Employee Information:
• Employer: UAMS USA
• Location: Little Rock, AR
• Number of Employees: 275

commercial CASE STUDY

HEAL delivered a truly turnkey program that benefits both the facility and our employees!"
- Bill Hester, General Manager, Arlington Resort Hotel and Spa

Arlington Resort Hotel and Spa
Hot Springs National Park, Arkansas

Company At A Glance

• Building Size	310,000 sq. ft.
• Year Built	1934
• Estimated Utility Savings	\$104,069 Annually
• Net Cost of Investment	\$28,424
• Implementation Time	6 months
• Estimated Gas Savings	1,240,000 lb. annually

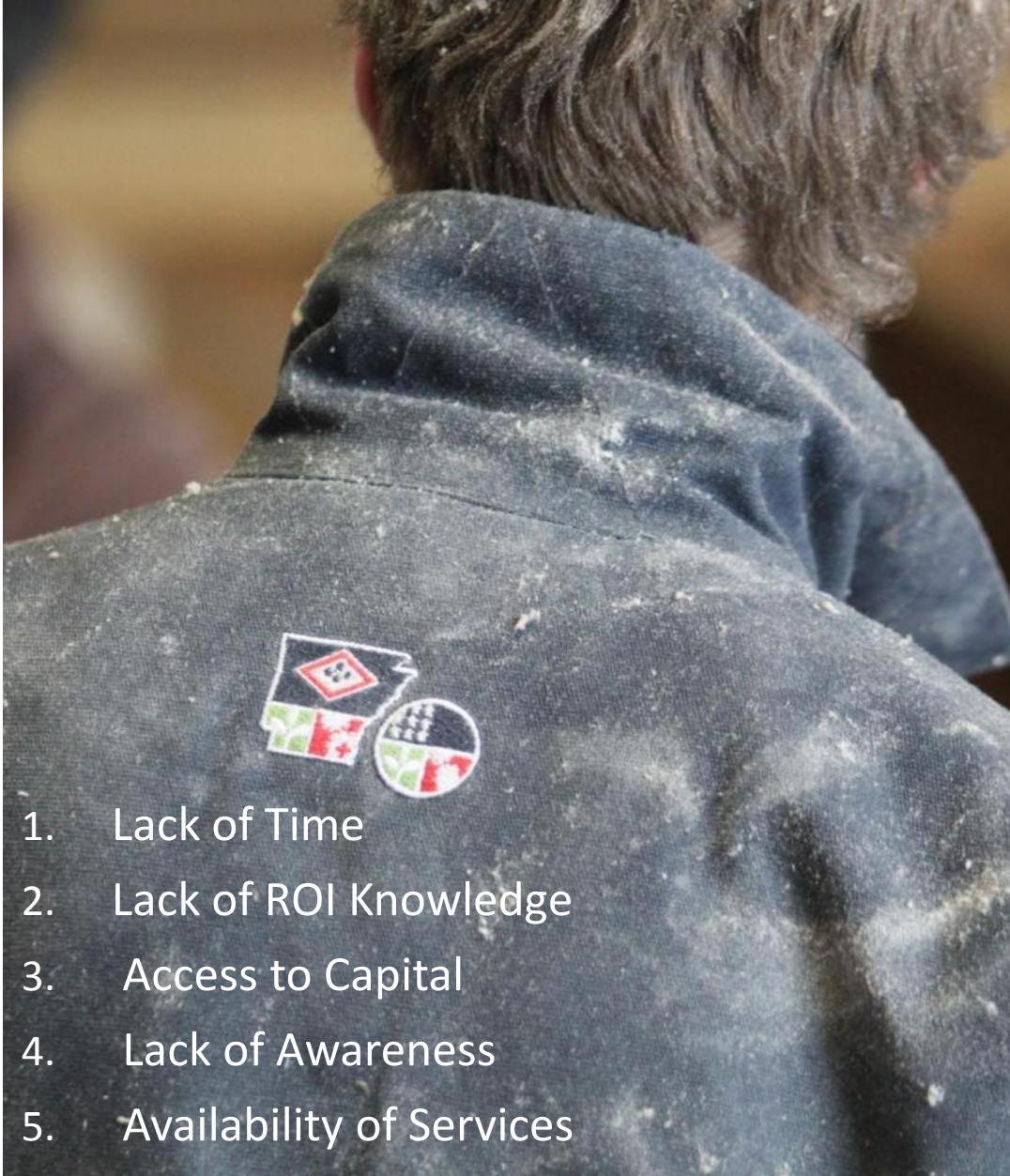
HEAL is a program of the Clinton Foundation. For more information, visit www.clintonfoundation.org.

CLINTON FOUNDATION
CLINTON CLIMATE

CCI HEAL

III. Then Retell the Story with Specific Results

“Why don’t they do it themselves?”

- 
1. Lack of Time
 2. Lack of ROI Knowledge
 3. Access to Capital
 4. Lack of Awareness
 5. Availability of Services

Disposable

Participants
in disposable



Cost of prov

Equivalent
to the after-
tax impact
of a...

for an employee
making \$40k

Compared t

Annual
increase in
disposable
income

Estimated Potential Imp

Based on employee participation rates and energy improvement levels experienced in the pilot, we modeled the potential savings from a enterprise-wide rollout of the HEAL program.

\$\$\$

Benefit to local economy

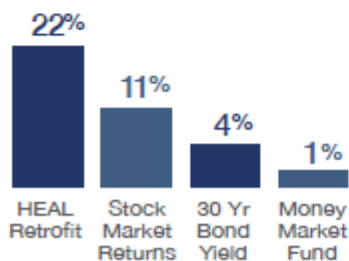
\$8.7
million



Average project
ROI for pilot
participants

22%

HEAL Savings vs. Investments



HEAL Pilot Results

XXXXX

| 11

Healthy Homes Potential of XXX Rollout


Homes having an
occupant with a
respiratory issue

24%


Homes reporting one
or more health-impac-
ing concerns

60%

47%
Indoor air quality
concern
34%
Moisture, mold,
mildew issues

Based on pilot participation, HEAL could impact...



743 XXX households with at least one respira-
tory-challenged occupant



446 estimated households with an occupant
that suffers from asthma

Potential asthma triggers include...

Mold/moisture:	154	Estimated XXX homes of asthma sufferer(s) with these environmental triggers
IAQ:	211	
Combustion gases:	335	

IV. Plan to use Targeted Earned Media

Don't confuse eyeballs with influence- uniqueness has a shelf life





CCI HEAL

home energy affordability loan

AN EMPLOYER SPONSORED
ENERGY BENEFIT PROGRAM

by



CLINTON CLIMATE INITIATIVE

HEAL Presentation Highlights

- The workplace is a great place to promote energy efficiency:
 - The captive audience allows for inexpensive marketing and easy engagement. For example, HEAL held several 30-45 minute brown bags.
 - Home upgrades can help improve employee home health and decrease sick days, particularly for employees with asthmatic children. For example, HEAL asked employees if they have someone at home with asthma. They then were able to tell other employees that a certain number of their coworkers could be suffering from asthma triggers and that upgrades could pose a health benefit.
 - Home energy efficiency can decrease employee utility costs, helping to stretch their paycheck.

HEAL Presentation Highlights continued

- Consider engaging a company through a pilot program first, but determine upfront what it will take to convince the next round of stakeholders.
 - Pilot programs not only allow for a small-scale test run, but also provide an avenue to develop case studies from within the company to help attract future customers.
 - Identify key decision makers early in the process; it may be necessary to interview company vendors to do so.
 - Determine the data needed for future investment. Companies' interests will differ, but most will wish to see a return on investment metric.
- Develop and maintain trust with both the employee and employer.
 - For the employee, emphasize that the program will not share home and energy usage information with their employer.
 - For the employer, conduct quality assurance inspections on 100% of homes, and uphold strict contractor disbarment rules.

Discussion Questions

- What opportunities have you found to market energy efficiency upgrades through affiliate partners?
- What are the advantages of working with “trusted intermediaries” to reach new energy efficiency customers?
- What challenges have you encountered in working with intermediaries to encourage energy efficiency upgrades? Are there disadvantages to this approach?
- Other questions/issues related to the topic?

Tips for a Successful Affiliate Partnership

- Choose the right corporate or institutional partner:
 - The most successful affiliations were with health care and higher education companies of 500 or more, and companies with well-paid employees.
 - Companies need to invest in the program. Example investments include communication support, program credibility, staff time for program coordination, and financial incentives (accessible loans, comp time for audit, etc.). For example, all HEAL programs allow employees to repay loans via direct payroll deductions.
- Leverage the word-of-mouth marketing:
 - Identify Energy “Champions” at all levels and departments, showcase them on marketing materials, and use their experiences to build a case for program continuation.
 - Ensure a robust quality assurance program. Word of mouth spreads especially quickly in the corporate environment, so programs need to uphold high standards for their contractors’ quality of work.

Closing Poll Results

- After today's call, will you:
 - Tell a colleague or partner something you learned – **100%**
 - Try an idea or approach discussed on this call in your work – **0%**
 - Evaluate potential changes to your interactions with affiliates – **0%**
 - Other (please explain)? – **0%**

Thank you!

Please send any follow-up questions or future call topic ideas to:
peerexchange@rossstrategic.com