

Energy Impact Illinois Learns That Parties Sell Upgrades

When Better Buildings Neighborhood Program partner Energy Impact Illinois (EI2) didn't achieve the response expected from a mass media advertising campaign, program administrators saw an opportunity to try a different strategy—one that relied more on a community-based, boots-on-the-ground outreach campaign. Through a “house party” initiative, EI2 brought Chicago homeowners, neighbors, and friends together to learn about energy efficiency opportunities, while increasing demand for home energy assessments and upgrades. Following is an abridged transcript of an interview with Dan Olson, senior energy efficiency planner, and Emily Plagman, senior energy planner for the Chicago Metropolitan Agency for Planning (CMAP), which helped create and administer the EI2 program.

What kind of marketing were you doing prior to ramping up the house party initiative?

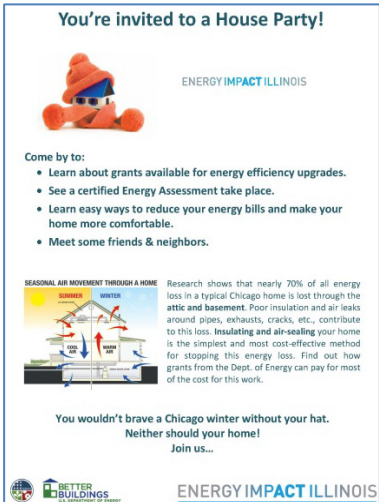
From the beginning of our program, we had always planned to have a comprehensive, tiered communications strategy that would begin with a mass media marketing effort followed by a community outreach component. After running our award-winning advertising campaign for several months, we saw a slight bump in traffic to our website, but the number of people signing up for upgrades was far short of our expectations. The realization that mass marketing wasn't enough to spur people to action led us to develop a more finely-tuned and personally engaging community outreach campaign. We were inspired to start our house party model based on the “neighborhood sweep” approach we'd heard about from the U.S. Department of Energy (DOE) and other programs.

What is the objective of a house party? What were the requirements for hosting or participating?

Our objective with these parties was to bring single-family homeowners closer to contractors and the process of energy efficiency. For attendees, the positive social environment of these house parties helped demystify the complex topics of home energy losses and building upgrades. Other than bringing five to 10 guests to the party, the only requirement for the hosts was allowing the contractors (i.e., energy professionals) to walk around certain areas of their homes and demonstrate blower door tests and infrared camera equipment to identify opportunities for energy-saving upgrades. Our program supplied the staff and the necessary equipment and materials.

Which homeowners and homes were targeted?

Early in the EI2 program, we had conducted a market segmentation study and felt that the low-income energy efficiency group was already well covered in the region, so we focused on a higher income bracket. Households that we named the “energy efficiency motivated” and the “energy efficiency cost-conscious” were determined to be the most applicable audience for our program. This knowledge informed the messaging we used in marketing and in-home conversations: we emphasized the environmental benefits, improved home comfort, and utility cost savings associated with energy efficiency upgrades, and we targeted owners of homes with one to four units.



You're invited to a House Party!

ENERGY IMPACT ILLINOIS

Come by to:

- Learn about grants available for energy efficiency upgrades.
- See a certified Energy Assessment take place.
- Learn easy ways to reduce your energy bills and make your home more comfortable.
- Meet some friends & neighbors.

SEASONAL AIR MOVEMENT THROUGH A HOME

Research shows that nearly 70% of all energy loss in a typical Chicago home is lost through the attic and basement. Poor insulation and air leaks around pipes, exhausts, cracks, etc., contribute to this loss. Insulating and air-sealing your home is the simplest and most cost-effective method for stopping this energy loss. Find out how grants from the Dept. of Energy can pay for most of the cost for this work.

You wouldn't brave a Chicago winter without your hat. Neither should your home!
Join us...

BETTER BUILDINGS U.S. DEPARTMENT OF ENERGY ENERGY IMPACT ILLINOIS

How did EI2 go about organizing the house parties?

Through a staffing agency, we quickly hired 20 full-time field organizers, including five regional leads with a background in building science who were Building Performance Institute (BPI) certified and trained in program administration. These EI2 field staff were responsible for generating leads for house parties from their own personal networks; meeting one-on-one with community leaders and attending community events to drum up support for the house parties was part of each field organizer's job responsibilities.

What happened at a typical house party?

Homeowners would invite their family, friends, and neighbors over for a social evening to listen and observe an abbreviated home energy assessment. Parties were staffed by a two-person team: an EI2 field organizer and a qualified contractor that was an expert on energy assessments and the upgrade process.

Typically, the [agenda](#) included an introduction to the program; a brief educational talk by an EI2 staffer (e.g., explaining building science concepts such as home energy loss); and an explanation of a basic home energy assessment. The final element involved the contractor leading guests through the house and demonstrating blower door and thermal imaging equipment. Guests were then given the opportunity to ask any questions and to sign up for their own energy assessments or to host their own house parties.



What did EI2 offer house party participants?

House party hosts received the energy assessment conducted during their parties for free. Attendees could sign up on the spot for a \$99 energy assessment for their own homes, or volunteer to host their own house parties and thereby receive a free energy assessment. In addition, on top of an existing financing product for home energy upgrades (i.e., 0% financing for the first year, and no more than 8% interest for the life of the seven-year loan), we added a rebate of up to \$1,750 or 70% of upgrade costs. This rebate was available to all single-family homeowners in the seven-county Chicago region that CMAP oversees.

How did you get those first few houses to sign up?

We reached out to a small network of people we had established from our initial round of outreach, including people who were already active in local energy efficiency initiatives. This gave us an opportunity to pilot the concept, collect feedback, and make adjustments up front before launching the house parties more broadly and encouraging homeowners across the region to sign up online. The house parties themselves ultimately proved to be self-sustaining and were the largest source of new leads for EI2. Once we introduced this outreach model, we significantly lessened our mass media efforts and focused on complementary earned media opportunities (e.g., radio and TV appearances, news coverage, local cable stations).

How many house parties took place, and how many upgrades resulted from this effort?

Over the course of the year, 652 house parties took place with 3,110 people in attendance. We estimate that more than 2,000 attendees signed up for assessments at the house parties, and an additional 540 attendees called our call center to sign up to host a house party—a conversion rate of 82% for house party attendance to assessment sign-up. More than 900 house party participants completed upgrades, making the conversion rate of assessment sign-ups to completed upgrades around 41%. This showed us that helping people see and understand—showing homeowners specific areas of their homes that are losing heat—and giving them a chance to ask questions can really drive up conversion rates.

How did you select contractors, and how did they benefit from this initiative?

We established a closed network of 54 contractors conducting weatherization or HVAC upgrades, all of whom were BPI certified and had worked previously with the Illinois Home Performance with ENERGY STAR program or a similar utility-based efficiency program. Contractors had to agree to our quality control standards—we spent a lot of time on the front end ensuring they were performing high-quality work. They also had to agree to offer assessments for \$99, which they were willing to do because the house parties were huge lead generators for them: each party gave them a captive audience of five to 10 homeowners. Having this closed network of contractors helped drive competitive pricing. In addition, the rebates made the contractors' sell easier. Because we assigned house parties to the contractors, we were essentially doing their lead generation for them. We also helped them develop their business by offering customer service training.



What were the costs associated with the house parties?

Including EI2's payment to the contractor for the host's \$99 assessment plus outreach staff time, we estimated that the per-party cost to our program averaged out to \$200 to \$300.

What advice would you give other programs interested in trying a similar approach?

- ▶ **Keep it short.** Initially, each house party lasted three to four hours, but after hearing from the hosts that these were a little long for a weeknight, we capped the parties at two hours.
- ▶ **Offer an incentive for hosts.** Many people were eager to receive a free home energy assessment, which encouraged expanded participation.
- ▶ **Create a comfortable, pressure-free environment.** Field organizers announced at the start of each party that they weren't there to make a hard sell; EI2 is a not-for-profit third party educating homeowners about resources that can save them money and energy. Having program outreach staff attend parties was critical, because they were perceived as a credible source who validated the expertise and recommendations of the contractors.
- ▶ **Set numeric goals for your organizers.** We built performance targets into our field organizers' job descriptions, and our staff overall were successful at meeting these targets.
- ▶ **Be disciplined with your metrics.** Given our time constraints—we had just one year to achieve 3,000 upgrades—we had to ask underperforming contractors and field organizers to leave the program. Maintaining a high-performing staff helped ensure we could achieve our goals.
- ▶ **Hire locally.** Be as close to the ground as possible with your outreach. Given the option to bring in an outside firm to do the field organizing, we elected to go local. Community members know their areas best.
- ▶ **Make energy efficiency a party.** Between our marketing campaign and field organizing, we tried to make things fun despite the serious business of getting the assessments and upgrades done. Most folks don't want to think about the technical aspects of home energy efficiency improvements, so you have to engage them by minimizing "tech talk" and keeping it fun.

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