

ENERGY ISLAND:

A GUIDE TO CREATING YOUR ISLAND ENERGY CHALLENGE



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The background consists of numerous thin, light blue lines radiating from a central point, creating a sunburst or starburst effect. The lines are evenly spaced and extend to the edges of the frame. In the center, the word "OVERVIEW" is written in a bold, yellow, sans-serif font. The text is horizontally centered and spans across the middle of the image.

OVERVIEW

This guide is designed to serve as a “how-to” reference for island communities (or small, similarly sized, more isolated communities) that want to develop and implement a residential energy-efficiency and conservation program.

The purpose of this guide is to help communities chart a course for successful program development based on the lessons learned during implementation and operation of RePower Bainbridge—an energy-efficiency program on Bainbridge Island, Washington.

RePower, Conservation Services Group and The United States Department of Energy Better Buildings Program designed this guide for community leaders, municipal staff, non-profits, and any motivated community members or organizations who are interested in resource conservation. Where applicable, data-driven results are provided to illustrate the community, environmental and economic transformation potential of energy-efficiency and conservation programs in small to medium-sized island communities.

CHAPTER 1. OVERVIEW

WHAT IS REPOWER?

RePower Bainbridge (RePower) is a residential energy-efficiency and conservation program designed to foster a sustainable, clean, and renewable energy economy. RePower was a three-year effort on Bainbridge Island, WA, to reduce energy demand, eliminate a peak load

capacity challenge, complete home energy assessments, upgrade Island homes, promote renewable and clean energy systems, educate homeowners and create green jobs. RePower is a community-focused residential energy-efficiency program model for island communities worldwide.

RePower’s energy-efficiency efforts are based on conservation efforts including energy assessments with direct installs of energy-efficient lighting and shower

heads, building envelope improvements, heating system upgrades, fuel conversions, renewable energy systems, as well as demand response systems and comprehensive community education and engagement.

RePower was made possible through a U.S. Department of Energy Better Buildings grant, in partnership with Conservation Services Group, Puget Sound Energy, City of Bainbridge Island, Kitsap County, Washington State University Energy Program, Washington State Department of Commerce, Kitsap Credit Union, Puget Sound Cooperative Credit Union, Positive Energy, and the hard work of many Bainbridge Island community members.

PATH TO SUCCESS

The true strength of RePower is in its origination, stemming from a grassroots community effort to reduce energy use on Bainbridge Island. In 2010, Puget Sound Energy informed the City of Bainbridge Island of a looming utility system capacity challenge, and recommended a new substation and a new set of power lines across the Island. The City and community responded with a full scale community education and action campaign to inform residents of the capacity challenge and encourage homeowners to take action.

The community had a built-in desire to work together and find a less impactful way for their electric utility to meet increasing energy demand during peak-use hours. The out-of-the-box alternative solution: Use less energy! Residents pushed for the “Bainbridge Island Energy Challenge” to lower the demand threshold and keep the existing supply infrastructure for Island residents.

The average Bainbridge Island home uses **61%** more energy than the average home within PSE’s service territory in Washington.



A SNAPSHOT OF BAINBRIDGE ISLAND

- Bainbridge Island is 11 miles long with a population of approximately 25,000 people.
- Bainbridge Island is home to approximately 6,800 single-family residences.

- On average, Bainbridge Island homes use 61 percent more electricity than other homes served by Puget Sound Energy (PSE). Bainbridge Island homes use 19,000 kilowatt hours (kWh) of electricity compared to 11,800 kWh for the average PSE-served home.
- The high energy use is partly due to an aging housing stock: more than half of all island homes were built prior to 1980. Island homes are also a little bit larger than the average home in PSE's service territory.
- Fewer than 20 percent of Island homes built prior to 1980 have up-to-date insulation levels, and most are missing other key energy-efficiency retrofit measures.
- There is no natural gas on the Island. Approximately 70% of all homes are heated with electricity. The remaining 30% are heated with oil, propane or wood.
- The Island exceeds capacity on all three substations by two megawatts (MW) for just 10 hours each year.

Reducing energy waste makes a significant impact on meeting the Island's overall energy needs and addresses the peak capacity challenge. For these reasons, Bainbridge Island presents a perfect test environment to prove that energy efficiency is the cleanest and most affordable energy source.

REPOWER OBJECTIVES AND GOALS

Our objectives and goals were to:

- Eliminate energy waste through increased energy-efficiency and conservation.

- Avoid the need for a new Island substation and associated new power lines by reducing energy demand and minimizing peak loads.
- Ensure reliable, secure and affordable energy supplies to meet the Island's needs.
- Obtain as much energy as possible from local, clean and renewable sources.
- Enlist up to 700 homes in a demand response management program to reduce peak electrical demand.
- Reduce energy demand and boost the Island economy with the following measurable goals:
 - Perform 5,000 home energy assessments
 - Perform 2,000 home energy upgrades
 - Create 65 new jobs directly, and 252 jobs indirectly
 - Save 49,707 million BTUs (British Thermal Units)
 - Reduce carbon emissions by more than 6,904 MT (metric tons)
 - Accomplish a minimum of 15% energy savings in each participating home.

HOW FUNDING MADE REPOWER POSSIBLE

RePower received a Better Buildings grant as part of the American Recovery and Reinvestment Act (ARRA) through the U.S. Department of Energy Better Buildings program.

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**BUILDING A
FOUNDATION
FOR SUCCESS**

CHAPTER 2. BUILDING A FOUNDATION FOR SUCCESS

The key to RePower's success was building a strong vision, goal statement and a community-supported foundation. Identifying a program's goals and developing a strategy to accomplish those goals cannot be done without sufficient planning. Examining what it took to accomplish just a single goal of the program by breaking it into its working parts is critical to understanding how the program can function and grow. Only when this exercise is complete, can an organization truly understand what it will take to move toward its goals.

CREATE YOUR PROGRAM'S MISSION AND VISION



This is the essential first step: Create and agree on a mission and vision with all stakeholders. Mission and vision guides the entire program moving forward, allowing decisions to be made quickly, and ensuring decisions align with the program's strategy and goals.

A clear mission/vision statement guides all elements of your program and should be developed around a conservation issue which resonates well with the community. For Bainbridge Islanders, the motivating factor was demand management and avoiding the cost and environmental impact of new energy infrastructure. Find out what matters the most to your community and organize your entire program around this cause. A program

can only be successful and reach wide-scale participation levels if the energy-efficiency and conservation efforts directly speak to and align with the target audience.

The vision must also clearly define the target audience. Determine what areas are of primary interest and define the scope: Are you addressing only single family residential homes or will the program include multi-family buildings? Will your program address commercial and industrial buildings? Do you want to include renewables or focus only on weatherization? Each sector requires a different approach so it's important to determine this early.

PROGRAM SCOPE AND IMPLEMENTATION PLAN

Once the vision and mission are established, the scope can be developed. At minimum, the scope must address the following key elements:

- **Partnership development and stakeholder engagement**—Partnerships with community groups that are reputable and already established in the community will help build community confidence and trust in your new program from the beginning. Set up partnership agreements with potential delivery partners. Of key importance are local government agencies, mission based NGOs, local economic development agencies, housing authorities, and perhaps most importantly, regional utilities. Develop partnerships with these parties and identify how your program may align with their initiatives and goals. Examples of programs to collaborate with include regional

climate action plans, existing utility conservation programs, and existing environmental, social equity or trades training programs.

- **Staffing plan** – Hire local staff which is already connected to the program’s mission/vision to build a dedicated and successful team.
- **Finance plan** – The finance plan will depend on many factors and program structure, but the key is to develop it with future ongoing finances in mind. The finance plan should address day-to-day operational needs, but should also include ongoing potential revenue streams. Who benefits from the program and may be willing to contribute funds? Is there an opportunity to include a revolving loan fund, and could the interest generated be sufficient to fund the program? What grant opportunities are out there? Think beyond operations and start lining up program partners who can help contribute to the effort. Utilities can often help with co-marketing efforts, and contractors may be willing to pay annual membership fees or lead referral fees to the program, in return for high-quality leads.
- **Marketing and outreach plan** – Base the marketing and outreach plan on the program strategy, and narrow marketing down to projects that drive results. Create a plan which uses a variety of outreach mechanisms and is built on co-marketing opportunities with partners, as well as support from a volunteer base. Identify existing community events that align with program mission/vision that the program can piggy back on. This can help reduce program marketing expenses, allows the

program to target specific audiences, and keeps the program fresh.

- **Volunteers** – Clarity in mission/vision will help in recruitment, retention and maximum utilization of volunteers. It will also assist the volunteers in serving as liaisons within the community.
- **Trade ally participation and training plan** – It is important to bring local contractors to the table early in the program development process. Ultimately, program success depends on the support and buy-in from your contractors, and as the program evolves, contractors will generate leads and become a strong marketing partner. Establish contractor agreements and building performance specifications early on, and agree to the standards that will be upheld by all participating partners. Choose a reputable weatherization organization, such as the Building Performance Institute (BPI), to serve as the baseline for program implementation quality and performance. Include a contractor training plan to grow local weatherization skills.
- **Energy assessment plan** – The key to success is providing neutral energy assessment services to identify energy upgrade needs for each participating customer. Keep the assessment plan simple; your role is to facilitate the upgrade. This may mean leaving the auditing and testing to your contractors and simply providing a non-diagnostic initial assessment to inform the homeowner of possible upgrade options and provide a clear set of recommendations. Provide technical guidance to

best assist the homeowner in their energy upgrade plans. Determine whether you want to include direct install products as part of your assessment. Including it in the audit means that you will obtain savings from every participating customer.

- **Weatherization and other energy upgrade specifications plan** – Develop a clear set of performance standards to which all your trade allies perform their work. To build confidence and ensure customer satisfaction with the end result, a program must have clear standards on any weatherization and equipment upgrade measures that are installed. Holding all parties to the same standards will aid quality assurance and control efforts and will also set a clear path for your training program. Include this requirement in your trade ally participation agreement and get buy-in from your contractors that they will uphold these standards. Don't forget to address customer service expectations in these standards.
- **Operational plan** – Once the energy assessment model, trade ally agreement, and performance standard are agreed upon, you can get started on preparing your program's operational plan. This plan should address everything from staffing levels to auditing tools used and energy upgrade reporting requirements.

DETERMINE KEY PERFORMANCE INDICATORS AND HOW YOU'LL MEASURE PROGRAM SUCCESS OR FAILURE



One of the first steps in establishing an effective reporting package for a community energy-efficiency program is determining the key performance indicators (KPIs) that will measure program performance. Key performance indicators are the quantifiable set of measures or activities that the program uses to gauge and compare performance in terms of meeting strategic or operational goals. They are the core activities and elements that are critical in tracking performance toward meeting program goals and achieving success; are specifically outlined in a program contract or similar agreement; and are necessary for evaluation purposes. It is also important that these KPIs be attainable and quantifiable, and that the program has a data tracking system allowing easy access to program activity detail.

Examples of trackable program activities can include:

- home assessments/audits
- energy-efficiency upgrades
- rebate payments
- energy-efficiency loan utilization
- monthly budget expenditures
- trade ally network activity
- home audit conversation rates
- types of upgrades (e.g., weatherization vs. equipment)
- marketing activities and outreach tracking.

Simply tracking program activities is not enough to evaluate performance. The program must also establish program targets and goals for each activity in order to have a measure or benchmark to compare against. These goals are established during the strategy and planning phase. To determine program activity goals, a program may analyze the following: industry/national trends, comparable energy-efficiency programs in other regions, program resources, market potential, timeframe, and economic factors.

A variance analysis is conducted if there is a significant difference between the actual performance of an activity and its forecasted/budgeted goal. This analysis seeks to determine the root cause of this variance and/or if program goals need to be reevaluated and adjusted. The conclusions of the variance analysis should also lead to recommendations and next steps to implement.



REALISTIC EXPECTATIONS GIVEN YOUR RESOURCES

Set realistic goals and milestones! Leverage relationships in the community and identify a variety of realistic ways to reach your goals. Involve stakeholders in determining goals.

- Resources should match your budget. If funding and goals are high, maximize staff size. Starting with a small team and working toward a big goal sets a program up to lose precious time that is needed in community outreach. Include volunteers where needed, recognizing that successfully recruiting, engaging and retaining volunteers requires a significant amount of resources.
- Determine technology needs at the outset and get

them in place before beginning your program. It's much more difficult and time-consuming to add technology once the program is in place.

- Identify all key stakeholders and include them in the planning. Not everyone is a stakeholder though, so use your mission/vision here.

Think through the pieces you are planning to implement and categorize them as a “must have” or “nice to have.” Focusing on the “must haves” first will ensure success in achieving goals and meeting budget. As time and budget allow, it is always possible to expand the program.

A TEST APPROACH TO PLAN A SUCCESSFUL PROGRAM

Our test approach required the following actions to result in a successful program:

- Understand the program basics: staff and stakeholder roles, technological/communication networks, and how customers and contractors participate.
- Begin with a pilot program that enables the program team to test initial community assumptions and avoid ineffective approaches. For example: Test our assumption that homeowners who receive a free home energy assessment are more likely to invest in energy-efficiency home improvements than those who do not receive home energy assessments.
- Define a start and end to the pilot, allowing time to analyze results and determine next steps. Develop processes surrounding implementation logistics, marketing, feedback loops and

transition to full program implementation and communicate appropriately.

- Launch and market the pilot with a subset of the larger community, supported by stakeholder and community leader participation. Recruit a pool of pilot participants who are willing to talk about the benefits of the program from a firsthand experience. Feature them in case studies to build your program’s promotional collateral and to start telling your story.
- Capture feedback, identify areas of improvement, and define next steps based on results. Share results with stakeholders and refine the full program-implementation plan based on pilot results.



KEEP IT LOCAL

The single most important thing RePower did to position itself well within the community was to keep it local. Hiring local employees familiar with the community vibe was infinitely beneficial to RePower. It allowed the program to be seen as a community-built initiative, and demonstrated commitment to putting money back into the local economy.

- **Local staff** – Every community has familiar faces who are seen as trusted resources. Local staff has insight into the community’s unique lifestyle and perspectives. It is also important to hire locally to demonstrate your commitment to creating local jobs for the residents.

- **Local phone numbers** – Local numbers are a “must” to position the program as “of” the community and “for” the community. It instills initial trust and community access.
- **Local office** – Small communities love personal interaction. A walk-in office is essential because it is visible in the community and provides a personal touch-point to those who want it.
- **Engage local organizations and politicians** – When appropriate, this can increase program credibility and trust within the community. Take advantage of it! However, if a community has a chaotic or highly-charged political core, this might not be the time to leverage political connections.
- **Support local businesses by ordering supplies and materials locally** – Use sustainable products to “walk the talk.” If feasible, sponsor local events.



SET UP YOUR PROGRAM OFFICE

A sufficient office space is essential to efficient and high-quality performance. Office needs will be determined by staffing, technological and storage needs. Programs need to identify:

- **Office storage** – Is additional off-site storage necessary and available, and if so, is it safe and convenient? You may need storage for marketing materials, direct-install products such as light bulbs, faucet aerators, smart strips and shower heads. We did not consider all of these items at the beginning of RePower. As shown in the photo, the higher than anticipated initial demand quickly made our office too small to store all direct install supplies. We ended up renting a separate storage



unit for our direct-install products and large equipment (e.g., ladders and blower doors).

- **Phone support** – Will there be an onsite call center or simply a voicemail system? Do you need multiple phone/fax lines? Will everyone be using cell phones? Do you need a conference line for meetings and stakeholder calls?
- **Accessibility** – How many full-time and part-time staff will be present? Will some staff work remotely? Determine office needs based on ideal working conditions and program functions.
- **Office space** – Are there areas that need to be quiet? For example, is a call center needed for customer service? The RePower office had an open floor plan which was challenging for our customer service staff who monitored calls and assisted walk-ins. Is there a need for conference rooms or a private space for private meetings? Will the office need to be public facing? If your program offers technical help desk hours for homeowners, consider designating a quiet space in your office where they can talk through issues and review technical requirements with energy advisors.
- **Onsite training areas** – Are onsite training areas needed? Can the program use existing community resources such as community centers?
- **Equipment** – What typical office supplies and equipment will be needed (e.g., computers, copier, pens, paper)?
- **Transportation** – Will staff use company cars or personal cars? Is there enough parking space for

staff and visitors? If staff is biking to work, are there safe areas to lock their bike? Determine how to cover mileage and expenses. Consider leasing electric or hybrid vehicles that promote energy efficiency and demonstrate that the program “walks the talk.”

STAFF UP TO DELIVER A SUCCESSFUL PROGRAM

The following reflects our staffing plan that enabled us to deliver a successful program which resulted in community adoption:

- **Energy Advisors** – The program’s objective energy advisor who provides a home energy assessment to the homeowner. They are well-versed in building science and energy-related home issues, and are ideally BPI certified. They serve as program spokespeople and technical experts to the homeowner and provide objective recommendations without an aggressive sales pitch. They have endless passion for energy efficiency and identify the best possible solutions for each homeowner’s specific home energy upgrade needs and available budget.
- **Customer Service and Administrative Representatives** – The program’s bloodline. They are local, able to talk about all things local, answer questions and guide callers to solutions. They are often the first touch a resident has with our program. They are well-spoken and know the ins and outs of the program. They do much work behind the scenes, track and follow up on customer requests, inquiries, and complaints, and provide valuable insight in program direction. The program simply cannot operate without them.
- **Program Outreach Coordinators** – They are outreach phenoms that exhaustively work to move the community to action through events, community organizations, political forums, school events, and meetings and more. They get others involved and are the key point of contact for the community. They multi-task, coordinate events, provide program direction and staff events – all with a smile on their face. They work closely with the Marketing Manager to determine the marketing strategic and tactical plans.
- **Data and Program Analysts** – They inform the team of community trends based on data and evaluate effectiveness. They are “number ninjas” who mine through endless amounts of data collected by the program and present findings and conclusions to the team and stakeholders in the form of reports that are easy to understand. They must be exceptionally detail oriented, fully proficient in Excel and other data tracking software, and be able to “translate” the numbers into information that tells a story.
- **Quality Control and Assurance Supervisor** – This team member facilitates and quality assures the work of contractors to ensure the homeowner’s upgrades are installed to best practice standards set by the program. They work closely with contractors to fix incorrect or incomplete

installations and ensure the work is done with health and safety top of mind. They are the change agents in the field, working to establish best energy-efficiency practices as industry standards.

- **Trade Ally Manager** – This person is building science-savvy and makes sure contractors deliver high-quality work which yields energy savings for homeowners. They actively solicit feedback from contractors, facilitates contractor meetings and delivers trainings to contractors and crews, both in-field and in-office. This team member shares program updates on a regular basis, issues topic specific newsletters, and checks the pulse of the participating contractors to ensure the program continues to meet both market and contractor needs.
- **Finance Manager** – The Finance Manager provides regular reporting to the Program Manager and Program Funders, ensuring funds are used as efficiently as possible. Budgets are to be kept in line with program goals and funding requirements. This person brings grand ideas back to reality by lending a voice of reason with relation to the program's bottom dollar.
- **Marketing Manager** – The Marketing Manager works closely with the Program Manager and Outreach Coordinator to develop and implement strategic and tactical marketing plans to move the target audience to action and meet program goals. This person is creative, a communications expert and on top of marketing trends. The Marketing Manager has

a keen understanding of the needs and concerns of target audience and how all the components of the program work together to create the customer engagement and trade ally experience.

- **Program Manager** – The Program Manager is the Jack or Jill of all trades, filling in where holes appear, in order to keep the program moving forward. He/she maintains client, funder and stakeholder relationships as well as reaches out to potential program partners. This person is responsible for managing the team, directing program progress, managing budget, and keeping it cool when things get tough. This person demonstrates a high level of vision while marching the team toward meeting program goals.

DEFINE YOUR REPORTING STRUCTURE, PLATFORM AND FREQUENCY

Establishing relevant and accurate reporting is critical to implementing a community energy-efficiency program. A proper reporting package provides performance information, and functional analysis and intelligence on the effectiveness of program activities. Program reports should be understandable, relevant, reliable and comparable.

The platform in which the program delivers its performance reports can be designed in many ways. The program may be obligated to deliver its reports based on certain format and compliance requirements that are outlined in funder contracts or stakeholder agreements.

The program may also provide external public-facing reports, but must first determine the suitability and permissibility of releasing such information to the public.

Performance reports are usually comprised of two components.

1. A quantitative piece that provides numerical information on program performance
2. A qualitative piece that provides more descriptive and narrative information on program activities, progress, performance variances and next steps

The frequency of program reports should occur on a monthly and quarterly basis. An additional year-end report summarizing the year's activities is recommended. The frequency of each report may also determine the length and detail of information. Most importantly, keep things simple. Provide a one page overview reflecting key progress statistics which can easily be shared with stakeholders and the public. A sample RePower progress dashboard is included in the appendix.



LESSONS LEARNED Along the Way, We Learned...

Up-front planning is absolutely essential, as is sticking to the program's mission/vision to accomplish goals. The more up-front preparation, the less crisis management the program should have to accommodate. Regular program evaluation and review of lessons learned is important to make sure the program moves in a forward direction and does not repeat unnecessary and unsuccessful efforts. Here are some of RePower's key lessons learned:

- Have your ducks in a row before hitting the pavement. Plan completely and for every possible scenario, then launch.
- Develop a basic plan to implement as a small pilot. Reconvene with the team and key stakeholders to discuss the program's next steps following the small pilot. More reviews need to happen on a fairly frequent basis.
- Seek out local supporters who are willing to speak about the program and have a burning desire to truly advocate. Make sure the expectations for your community advocates are clear and check-ins are frequent. Find ways to identify potential advocates as your program progresses, working with their lifestyle and comfort levels rather than imposing on them.
- Work closely with your marketing team to create a marketing plan that aligns with program goals and strategy. Make sure that marketing projects can be delivered by the number of people on your marketing team. Again, expectations and commitments must be attainable and agreed on by the program and marketing teams.
- Local programs are constantly evolving, and it is extremely important to be able to make adjustments quickly. To the extent possible, this means ensuring partners are able to adjust quickly as well. Identifying process timelines and establishing the feedback loop in advance can help relieve the headache of overpromising and under delivering.

- Have processes in place prior to program launch, don't develop them on the fly. This leaves adequate time to course-correct smartly.
- Identify what motivates homeowners. It's not always about the money for your customers. Energy efficiency is also about comfort, the environment and healthy indoor air quality. Identify what motivates each homeowner and address the community from multiple angles.
- Set realistic goals and milestones. Adapt to unplanned trends. For example, RePower hit the ground running and received a tremendous amount of early adopter sign-ups for home energy assessments. However, it took these homeowners nearly a year to complete their upgrades. It took a "final call" marketing campaign in the last year of the program for RePower to hit its stride. The long project conversion timeline required us to adapt strategy and forecasting. Only after understanding homeowner needs, planning timelines and making the necessary marketing adjustments did we succeed in being a change agent in the Island community.
- Have a strong mission/vision. This helped RePower create a strong brand in the community.
- Hire local employees. Having staff members who are familiar with the community vibe was infinitely beneficial to RePower, and was the single most successful thing our program could have done to position ourselves well in the community.
- Have a contractor manager in place and connected to local contractors to ensure work gets completed and reported at the onset of your program.
- Engage contractors early and define the contractor approach before the launch of your program. A delay in defining the approach will result in a slow and difficult start, and ultimately require changes in your program strategy and forecasting.
- Secure a sufficient office space to ensure higher levels of performance. Office needs shall be determined by staffing, technological, and storage needs.
- Review results of marketing campaigns regularly and determine whether they are achieving the pre-determined campaign goals. If not, determine why and adapt marketing and program strategies to make up for lower-than-expected results.
- Review event participation regularly. Is participation speeding up or slowing down, and why? As in the step above, adjust your strategy to make up for the differences. RePower's best community event was a one-stop-shop event which allowed customers to sign up for assessments, talk with contractors, review program and technical details with RePower staff, and get bids signed and rebates approved, all in one location. Plan and schedule your events with a focus on customer convenience.

- Evaluate partnerships and stakeholders to ensure continued mission/vision alignment. Make sure you're communicating often with them.
- Schedule all-hands-on-deck meetings and/or retreats to keep the team motivated and in sync.
- Accept and expect that in a start-up program, there will be failures as processes and systems are put into place. Management should create an atmosphere that embraces these failures as opportunities to learn, grow and improve.
- Neighborhood outreach and organizational challenges can be effective, but also take a lot of hand holding and

coordination. Neighborhood energy challenges work best in dense communities where there are many "eyes on the street." Neighbors get interested by seeing other neighbors take action.

- Place lawn signs in front of every home during energy assessments. RePower's "My Home Makes an Impact" yard sign triggered more calls to the office than any other program launch campaign. Use recycled material signs and make sure to provide homeowners with a yard sign disposal plan.

Refer to the Appendix section of this guide to see examples of successful program and marketing efforts.

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IDENTIFYING
TARGET AUDIENCE
AND STAKEHOLDERS

CHAPTER 3. IDENTIFYING TARGET AUDIENCE AND STAKEHOLDERS

TARGET AUDIENCE

Identifying your target audience is crucial to developing an effective marketing and outreach plan. Here are some key questions to ask to help understand your target audience:

- Which residents will help you achieve your energy-saving goals? Are you interested in targeting residents who live in older homes, which may have potential to save the most energy?
- Get to know your community residents and identify their key motivators. What makes them act? What are their concerns? What do they value and what key words speak to these values?
- What do your community members say? Couple your research with focus groups to check whether your findings and conclusions are sound.

STAKEHOLDERS

Identifying stakeholders can be a difficult process. However, the following questions can reveal the strongest stakeholders for your program:

- Who in the community is doing something that aligns with your mission?
- Who is influential in your community and has the ability to motivate people to act?
- Who is funding the program?

- What are the community demographics, and who on your staff or in your stakeholder group can work closely with different demographic groups?
- Is there an established contractor network with which to align?
- Are loan partnerships built into the program funding or can the program create these partnerships if they don't exist?
- What is the utility's role in your program? Coordinate to leverage existing utility incentives and provide homeowners with a comprehensive matrix of all possible incentives available to them.

ENGAGE STAKEHOLDERS

Engage stakeholders early and interview them to determine compatibility with your program's goals. Identify whether the relationship provides a win-win situation and determine whether this is a relationship that can work throughout the life of the program. Possible stakeholders include (but are not limited to) sustainability organizations, city councils, mayors, governors, trade organizations, real estate agencies, neighborhood organizations, schools, utilities, lending institutions and trade allies.

Prior to engaging with stakeholders, the program's initial plan, goals and benchmarks should be clearly outlined. Stakeholders will then be able to provide insight based on their interests and have time to influence aspects of the program in a positive way.

The program leads should meet with stakeholders regularly, communicate major program changes and

incorporate them in the review, feedback and approval process for program initiatives. It is critical to keep stakeholders abreast of major program activities, milestones, and events; however different stakeholders should be engaged at different levels, based on their involvement. Some stakeholders do not take an active role in the program implementation and only prefer to receive program updates and occasionally make connections in the community. Others like to be in-the-know on every outreach effort and provide feedback based on their expertise and knowledge of the community.

ALIGN WITH UTILITY STAKEHOLDERS

Utility stakeholders are by nature more involved because your conservation program goals need to align with their strategy and measures. Your program offers much benefit to utilities since you'll be promoting their incentives and driving customers their way. Leverage their networks and promote their benefits. Islands can have challenging power supply and demanding situations. Collaborate with the utility to determine which new technologies and building upgrades are most appropriate for your utility infrastructure and local conditions. The goal is to build toward sustainable long-term solutions and increased island resilience.

LENDING PARTNERS

Residential energy-conservation programs can benefit from working with local lending partners which finance retrofit projects. Financial assistance can help eliminate

barriers for some homeowners and help others make more or larger home energy improvements. Offering financial assistance will help move customers toward more whole house energy upgrades, which will increase overall energy savings results. Lending institutions nationwide now offer a variety of programs that you can partner with, but the ideal solution is a custom financing program with your local bank or credit union, designed to align with your program offerings and requirements.

When partnering with local lenders, it's important to create a loan structure that is both enticing to a consumer and profitable for the lender. Negotiating effective interest rates, terms and pre-qualification requirements is crucial. A highly attractive and easily marketable product is one that allows the homeowner to recover a substantial or entire portion of the initial loan amount through energy savings over the life of the loan. For more information about the RePower loan program, review the information in Financing Tools in the Program Services section. The appendix also includes a sample Lender Agreement Form as a reference.

ENERGY EFFICIENCY LOANS

RePower collaborated with Kitsap County, Washington State Department of Commerce, and Kitsap Credit Union to provide a program specific and custom designed loan program for participating homeowners. After slow initial loan uptake, RePower restructured it's loan program to reduce the income cap and eliminate some other pre-qualification requirements. We also added a second lender,

Puget Sound Cooperative Credit Union to offer a second financing option.

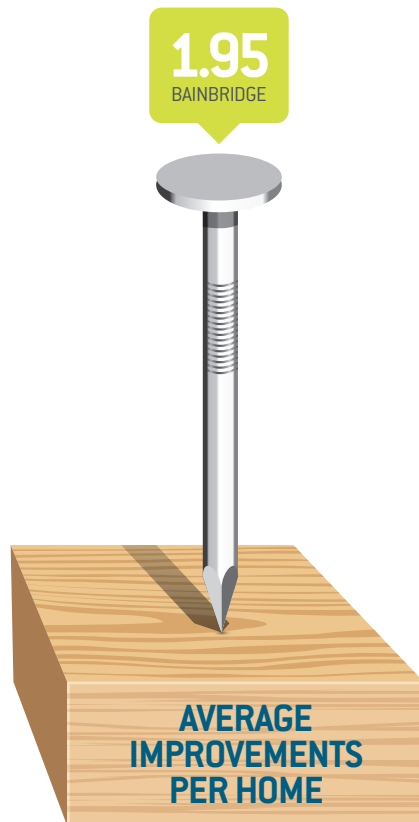
To encourage more whole house energy upgrades and more comprehensive job scopes, RePower collaborated with its lending partners to allow rebate checks to be directly applied toward energy efficiency loans. RePower set up a bonus incentive structure to encourage homeowners to complete larger projects, and then mailed incentive checks to the credit unions, instead of the homeowner. This agreement allowed homeowners to see a significant drop in their loan balances and average monthly payments within a month of taking out the loan. By encouraging contractors in our network to calculate deemed monthly energy savings per upgrade measure, homeowners using the loan could also compare deemed monthly savings to their monthly loan payments and were able to make highly informed decisions.

Once a lender partnership has been established, create synergy and momentum by educating the lender's internal staff about the program, including its goals and priorities. Provide a program overview and training to staff at all branches in your community. Lender staff training

should include an overview of program requirements and should clearly detail the desired communications protocol between the program, the lender, participating contractors, and customers. Staff awareness about the credit union's energy efficiency loan offering was one of RePower's greatest challenges early on. An effective tool to inform Lender staff about program requirements is to conduct a diagnostic energy assessment at one of the staff's home.

To improve the customer experience, encourage the lender to assign specific staff who are well versed in the energy-efficiency loan process, and understand eligible energy upgrade measures that may be included in the loan amount.

To reduce lender risk and improve the lender experience, require loan applicants to use approved trade allies. Loans tied to quality assured and performance tested jobs, installed by trained and certified professionals, will pose less risk to the lender and ensures customer satisfaction in energy and money savings.



BUILD A STRONG, ACTIVE TRADE ALLY NETWORK

A qualified, trained, and trusted trade ally network is at the heart of every energy efficiency and conservation program. Their ability to effectively develop scopes of work, adhere to program specifications, and deliver the best customer service, helps ensure program validity, brand recognition, and trust. Without the support and buy-in from contractors, program success is not possible.

Establish clear requirements for contractors seeking to join the trade ally network. Occupational Safety and Health Administration (OSHA) and lead-safety training should be a prerequisite for any contractor working in a home, especially in the fields of weatherization and Home Performance with ENERGY STAR®. Proper contractor licensing and insurance should be well documented and kept current. Requiring BPI certification ensures that the contractor has expertise in a wide range of services and safety issues, including Home Performance, combustion safety and indoor air quality.

Research into each contractor's prior service record is also helpful. History with the state business licensing board and current ratings on consumer service sites, such as Angie's List, allows the program to further screen potential trade ally contractors. A strong and reputable trade ally network can help market your program and increase the number of upgrades made by homeowners. On Bainbridge Island, the average number of improvements per home was approximately two.

A contractor training plan should be robust and include continued opportunities to further develop energy assessment and diagnostic skills, salesmanship, customer service, business acumen, and new technologies.

Initially, trainings should help familiarize contractors with the work specifications manual used by the program, as this is the standard to which all quality assurance (QA) inspections will be held. Once the program gains experience working with the contractor network, additional trainings can be developed based on discovered areas for improvement, contractor and consumer feedback, and state or regional updates to code or work specification. This highlights the importance of developing

a strong internal quality control (QC) process to generate information on each contractor's performance, and to consistently track the comments or responses generated from both contractors and consumers. Lastly, working with local educational institutions to deliver continued training opportunities will aid in the development of sustainable training resources for contractors and their staff.

Strong communication between programs and the trade ally network increases dialogue and helps create a more fruitful relationship for both. Weekly email updates can highlight contractor successes, provide program updates such as rebate or specification changes, and communicate training opportunities. Monthly brown bag meetings can provide a healthy environment for contractor feedback and open communication and networking within the group. Helping to form a contractor-led group can streamline communication even further by developing a common voice that represents contractor opinions and needs. This allows programs to elicit feedback from one source rather than each contractor individually.

It is also crucial to have a program representative in place from the beginning that manages the network and enforces specifications. Bad habits can form quickly without direction. The rebate structure should be easy to understand and contractors should be highly familiar with it to avoid customer confusion and dissatisfaction. Never assume that contractors have the skills or equipment required to perform high-quality work. Rather, take the time to get to know each contractor's skill set and equipment needs. Also, consider program strategies for spreading leads out and avoiding seasonal highs and lows. Contractors would prefer to stay fairly busy year-round, rather than be overwhelmed one month and completely inactive the next.

Regardless if your program has a formal trade ally contractor network or is working with individual contractors, it is important to develop guidelines and processes that will clearly identify the roles, responsibilities and expectations of each party. See the Trade Ally Participation Agreement form in the appendix as an example. Processes include:

- Create and clearly document an enrollment process.
- Consider the necessary actions the program will take if a contractor does not follow guidelines. The program must be willing to follow through with removing a contractor if needed.
- Determine how the program will balance authority and support.
- Set up a program that offers contractors business and marketing support which encourages them to abide by program guidelines, offer incentives and provide regular reports.
- Set up an open forum for contractors to voice their suggestions and feedback about local market trends.



LESSONS LEARNED

Along the Way, We Learned...

- Collaborating with many different groups with different interests can be challenging. In any situation, try to find a win-win solution. Often times, this requires deviating a little from the original plan or putting certain projects on hold until timing is better.

Example: RePower developed an air sealing pilot in conjunction with PSE and allowed the utility to test

this new rebate within the program's small pilot environment. Based on the success of rebate adoption, the air sealing rebate was then finalized and launched throughout PSE's entire service area. This allowed consumers to take advantage of a more comprehensive rebate offering and expanded the program success beyond the Island.

- Working with organizations that have rigid operating procedures may pose some challenges. As a program, it is important to explore similar organizations that are more conducive to your program's needs. This may

need to be weighed heavily against the possibility of losing existing partnerships or political relationships.

Example: RePower brought a second lending partner into the program that was adaptable to our program needs. By bringing on an additional lending partner, instead of replacing our existing lender, we were able to keep our program and partnership structures the same.

Refer to the Appendix section of this guide to see examples of trade ally and energy advisor materials.

The image features a sunburst background with numerous rays emanating from a central point. The rays are composed of alternating bands of light blue and a slightly darker blue. Centered over this background is the text "SERVICES PROVIDED". The word "SERVICES" is written in a bold, yellow, sans-serif font, while the word "PROVIDED" is written in a bold, white, sans-serif font directly below it.

SERVICES
PROVIDED

CHAPTER 4. PROGRAM FEATURES AND SERVICES

Each community energy-efficiency program will offer different services and have unique features – the key is to identify community needs and under-served niches. RePower was designed to offer in-home energy assessments, energy-efficiency financing, rebates, a trade ally network, customer service center, technical help desk and marketing and outreach.

CUSTOMER SERVICE/CALL CENTER

The call center is generally the customer’s first point of contact with your program; therefore, positive, consistent and effective customer service should be provided during that initial experience. In smaller communities, this can be even more important because word spreads quickly, and the first few customers need accurate information to pass along to their friends and neighbors. Here are some best call center practices:

Call Center Talking Points

- Program talking points and responses to anticipated customer and contractor inquiries should be as succinct as possible. While it is tempting to deliver a large amount of information to the customer up front, they will only retain so much. It is important to distill the information down to the key points that are absolutely necessary.

- Modify talking points to match the customer’s personality, level of formality and knowledge about the program. The written talking points should represent a reference guide, and not a speech to read verbatim.

Customer Service Priorities

- Set the program apart from telemarketing companies.
 - Use the customer’s first name at all times.
 - Call at appropriate times. Make calls between the hours of 9 a.m. to 9 p.m., unless the customer communicates a different preference. For example, if a customer leaves a message before 9 a.m. to cancel an appointment and would like a call back to confirm the change, it is acceptable to call them before 9 a.m.
- Customers who visit the office should take priority over those on the phone.
- Have a team member, and not an answering machine, pick up phone calls as much as possible, even if it is just to take a message.
- Do not leave the customer on hold for long periods of time. Clearly state when the customer can expect a return call and call them at that time, regardless of if you have the answer to their inquiry.

Call Center Communication

- It is important to log all customer interactions in a central database. That way, no matter who the customer speaks to next, the customer service representative will always have the most recent information and conversation at his/her fingertips and they will not have to go over the same information again. This allows customers to feel as if they are receiving a higher quality and more personalized service.
- Make it a priority to keep call center and customer service staff up to date on new developments. It is especially important for the call center to be kept abreast of all incentive changes and marketing efforts, including advertisements and utility communication. Customers are often confused about the role of energy efficiency and conservation programs within utility jurisdiction. Call center staff should be prepared to inform callers of any additional utility program changes or rebate revisions which may affect their upgrade project.

TECHNICAL HELP DESK

Provide personal attention and build customer confidence in the program by staffing a knowledgeable and reliable, technical help desk.

Key components for success include:

- The help desk must be accessible by multiple avenues of communication (e.g., face-to-face contact, telephone, website, email and social media).

- The help desk specialist should have a working knowledge of program elements, including funding sources, stakeholders, utility and program rebates, basic building science and weatherization methods.
- It is advantageous to have the help desk specialist be someone who is recognized and respected in the community.
- Promote the help desk specialist as an advocate rather than a sales person.
- If you can't afford to staff a Help Desk full time, advertise clear Help Desk Hours and limit the hours to hours that are convenient for customers.
- The Help Desk is best staffed by a Program Energy Advisor who can help the customer make upgrade, material and equipment selections, point them to financing, and connect them with qualified trade allies who specialize in the work they need.

LESSONS LEARNED

Along the Way, We Learned...

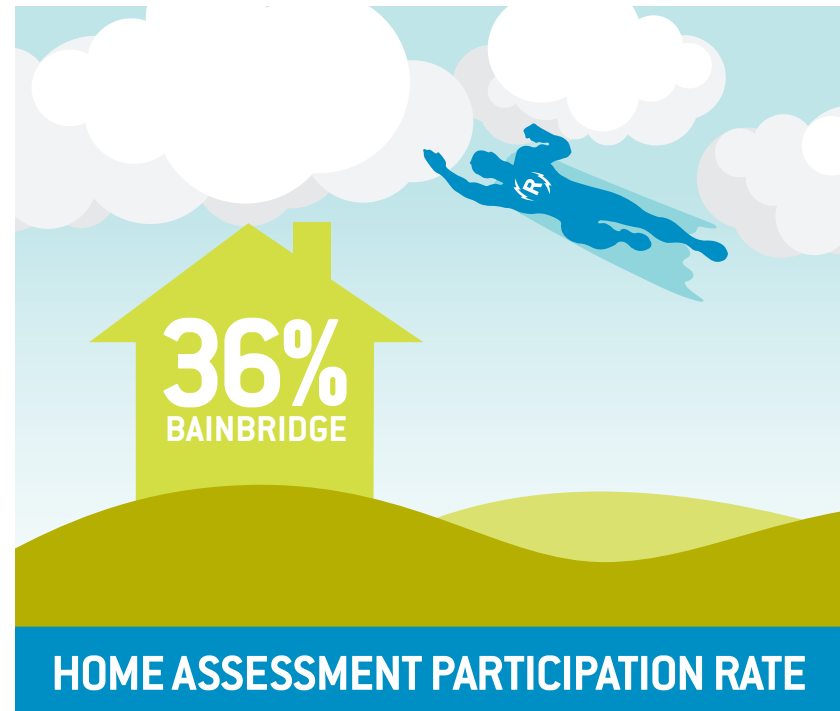
- Solid, unbiased information must be conveyed without exception.
- Technical and proven energy resources must be readily available to back up advice.
- There must be dedicated hours of operation for the help desk with the flexibility to respond to questions during non-working hours.
- There should be a back-up person to assist customers when the help desk specialist is unavailable.

- Staff should follow up after three months to see how the customer is progressing with their upgrades, ask if they have additional questions or barriers and help them come up with solutions.
- Feedback from homeowners should be shared with program staff, to determine whether course corrections are needed.

ENERGY ASSESSMENTS AND TOOLS

RePower offered two avenues for home energy-efficiency assessments: a visual FREE Home Energy Checkup performed by RePower Energy Advisors and a diagnostic Home Energy Assessment with Energy Performance Score (EPS) performed by a select group of trade ally contractors.

- 1 Free Home Energy Assessment.** RePower's FREE Home Energy Check-Up (HECU) was designed to offer a non-intimidating, low barrier, and no-cost program entry. The HECU was marketed as a simple but very important service every Islander should complete to understand their home's health and energy-efficiency status. A BPI certified RePower Energy Advisor conducts a 90-minute, visual assessment to identify efficiency, health and comfort issues in the home. The visit includes an attic and crawl insulation inspection, as well as a review of heating equipment and systems present in the home. The Energy Advisor then sits down with the homeowner to present the results, complete a utility bill analysis to identify seasonal and baseline load details, and offers three top-priority energy



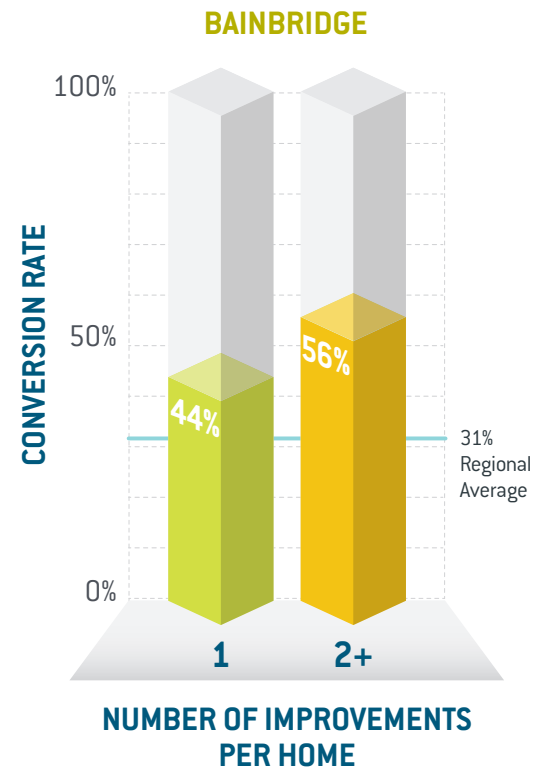
upgrade recommendations, ranging from air sealing and insulation, to heating systems and appliance upgrades. These energy recommendations were supplemented with an overview of other no-cost and low-cost upgrades, and information about rebates. Finally, the energy advisor provides the homeowner with a list of local, skilled contractors for the homeowner to call to schedule their home energy upgrade project. The free Home Energy Assessment included direct installs of energy efficient light bulbs and showerheads. Homeowners appreciated having a RePower energy advisor—an objective third party—educate them on energy-efficiency measures and their home's performance.

The visual assessment is also a great marketing and customer engagement tool. It provides an opportunity to collect data and build a personal relationship between the homeowner and the program Energy Advisor and encourage the homeowner to take the next step.

After learning about the energy efficiency of the home and how they can improve it using cash rebates, customers were more motivated to complete their energy upgrades, a diagnostic assessment and make energy-efficient improvements. By the time the customer calls a contractor, they feel more comfortable and confident moving forward with upgrades.

2 A Home Energy Assessment with Energy Performance Score. This fee for service assessment is performed by a participating BPI certified, trade ally contractor. The contractor inspects the interior and exterior of the home and performs diagnostic tests to identify areas of energy loss. After the assessment, homeowners receive an Energy Performance Score (EPS)—a detailed energy-consumption report similar to a miles-per-gallon report for their home—which documents the home’s current condition, including energy use and carbon footprint. The EPS also recommends improvements and a comparison of current energy costs to what a homeowner could pay after energy-saving improvements are installed. The trade ally emails the EPS report to the customer within ten days of the assessment and all assessment results are stored in a central database to which all trade allies have access.

HOMEOWNERS WHO MADE IMPROVEMENTS AFTER AN ASSESSEMENT



The EPS audit can take anywhere between two and four hours of advisor time in the home, and comes at a significant cost. RePower collaborated with another grant program in Kitsap County to offer a \$350 instant rebate to offset the cost. Market rates for EPS assessments in Kitsap County ranged from \$400 to \$650.

The success of these in-home assessments can be seen in the program's conversion rates. A large percentage of Bainbridge Island (44%) homeowners installed one energy upgrade after they received a home assessment. More than half (56%) installed two or more energy upgrade after the assessment. Notably, both conversion rates were much higher than the regional average of 31%.

A sample of the RePower Free Home Energy Check-Up form is included in the Appendix.

LESSONS LEARNED Along the Way, We Learned...

- Each program and community is unique. While some past experience with similar programs is helpful, it is not always applicable.
- Keeping track of inventory was challenging. If possible, invest in a Universal Product Code scanner to track direct installs and inventory.
- If possible, use electric, hybrid, or biodiesel work vehicles that align with the program's mission.
- If the utilities in your jurisdiction already offer a home energy assessment, determine whether you can integrate this assessment into your program. RePower ended up collaborating with Puget Sound Energy to offer the utility's custom HomePrint Assessment to Bainbridge Island customers. RePower was able to deliver more energy assessments to the utility this way, and the program also received \$90 per completed HomePrint from the utility.
- When collaborating with utilities on assessments and other efforts, establish clear guidelines on branding and collateral review expectations to ensure that both parties receive recognition and branding guidelines are adhered to.
- Although a less sophisticated product from a building science perspective, RePower's FREE Home Energy Check-Up accomplished higher conversion rates than the EPS assessment. Don't discount the importance of keeping things simple and easy for the homeowner. If you can offer a quick visual assessment and structure the program to incorporate performance testing as part of your trade ally's mandatory scope, a non-diagnostic assessment can be just as effective in delivering upgrades and reaching program goals.
- Visual assessments allow you to schedule more assessments a day - therefore reaching more customers faster. At program launch, RePower was able to schedule 4 appointments per day, and keep 4 advisors fully booked in the field. The more assessments we completed, the more yard signs went up, the more calls to our office to schedule more assessments.
- Schedule assessments with a 30 minute arrival window. Some homes take longer than others, so give advisors some flexibility in between appointments. If advisors are running late, they must call the customer to inform them of their new arrival time and ask program customer service representatives to inform additional customers of potential schedule changes that day.



TIPS FOR ENERGY ADVISORS: HOW TO PREPARE FOR IN-HOME ASSESSMENTS

1. Wear program-branded gear and have identification.
2. Address home inadequacies as “opportunities”—homeowners are often emotionally attached to their home and don’t want to feel as if their home is damaged or poorly built.
3. Control the discussion and the process. Ask what motivated them to have this assessment. Listen to their response and gauge their level of understanding. Some homeowners need more high-level information and others want to hear the scientific data.
4. Record all required data points before leaving residence. Collect required signatures and account meter number at the beginning of assessment.
5. Provide the homeowner with clear and timely information about the overall program, recommended measures, benefits, rebates, financing and next steps.
6. Documentation that is left for homeowners must be user friendly. Minimize changes so documents remain timely and valid.
7. Bring all equipment and direct-install materials to the front door to minimize trips back to the car.
8. Wear shoe covers to protect the home. Tidy Trax slip-ons tend to work well.
9. Ensure that appropriate time is allotted for the assessment and travel and always show up on time.

QUALITY ASSURANCE AND QUALITY CONTROL

Another key component to successful program operations is having a robust QA and QC plan. Programs vary vastly in their QA approach. RePower set a 10% QA target, but quickly realized that this was not enough to move the trade ally network forward.

The need for QA will largely depend on your trade allies’ experience in whole home performance. If your contracting community is fairly new to the concept, QA a high percentage of the jobs. If you already have a highly experienced contractor community, complete some random check-ins, but focus on delivering leads to them. Consider completing QA’s on the first 3 to 5 jobs of any new contractor joining the network, to establish clear expectations on performance and outcomes.

Also consider the balance between QA and QC. RePower’s contractor network was fairly new to whole home performance contracting, and it quickly became clear that our contractors needed more in-field guidance. We appointed a Quality Assurance Specialist who began working closely with trade allies on job sites, to train crews on the installation specifications and offer hands-on quality control services. This shift to in-field quality control greatly improved contractor performance. In addition, it helped strengthen contractor relationships and increased program trust. RePower completed diagnostic testing on all QA visits to ensure that that home was left in safe conditions. This included blower door testing, infrared imaging, BPI Combustion Appliance Zone (CAZ) testing and duct blaster testing if applicable. A robust QA implementation plan was essential in our new Home Performance market because it helped further train our trade ally contractors.

Process of providing QA visits:

- A QA visit should start with an introduction and brief discussion of the scope of work. Ask the homeowner to provide a tour of the home so the energy advisor can identify work areas, CAZ zones, and set the house up for a blower door test. While necessary tests and inspections are performed, ask the homeowner to fill out a survey to obtain valuable customer feedback.
- At the end of the inspection, provide the homeowner with summarized results, a list of rebates, and check that all necessary paperwork is completed. If a return visit is needed, provide general details to the homeowner in a way that will not alarm them or affect the contractor's reputation. Record all data from the QA in the form of photographs and an inspection form.
- Following the inspection, fill out an "Issue Notification Form" that summarizes the findings and project issues, and send to the contractor. All QA and QC visits should be recorded and tracked.
- It is extremely important to put a robust QC process in place early in the program. A QC inspection occurs when the project is in progress and representatives from the contracting company are onsite. Visiting homes after a job is complete to perform a QA or QC can be inefficient when there are reoccurring problems. We found that job quality quickly increases after QCs. It's hard to coordinate schedules and to get contractors to call you in the middle of a project, but if they see value in your

visits, they are more apt to call for a QC. Once your pre-determined QC guidelines and amount of jobs are approved, the contractor can move on.

Please reference the Quality Control Procedure and Quality Control and Assurance forms in the appendix as examples of how to create a QC process.



- To limit the amount of site visits, the energy advisor can attend the contractor's final test-out visit and complete a QA at the same time. This also allows repairs to be addressed immediately and provides a good training opportunity on specifications and program requirements. In addition, incorrect techniques and methods can be recognized early and be dealt with quickly before they spread to other projects.
- QA inspectors are often viewed as the "bad guys." To gain the confidence of the contractor network, position the energy advisor or inspector as an ally rather than someone who is coming out to scrutinize their work. It's also important to maintain consistency in the inspections and support the contractor in a positive manner. While this can be difficult to do when a job has several violations, it's important to protect the contractor's reputation, especially in front of homeowners.
- Work quality, specifications and expectations should be set at the beginning of the program and remain unchanged as much as possible. Contractors may work

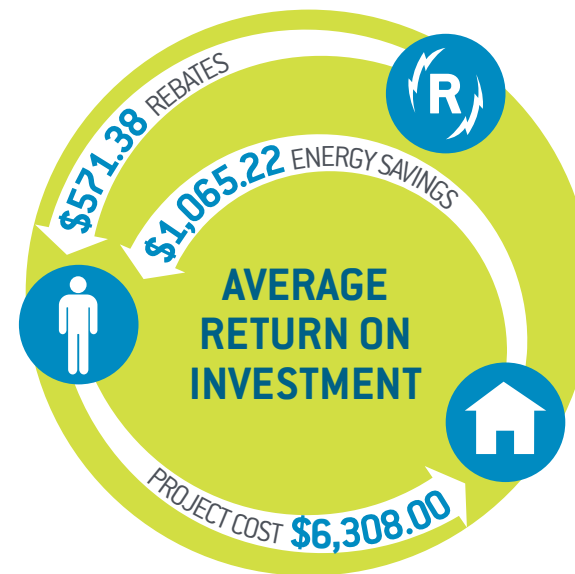
within multiple weatherization programs, which all have their own work specifications. Contractors often run into challenges where the specifications of one program do not align with the other. As a community energy efficiency program, you are ideally suited to facilitate alignment of specifications. You should develop your specifications in collaboration with participating utilities, and identify potential issue areas up-front. It is best for a program to set specifications by starting with a utility weatherization manual, aligning program specifications as much as possible to keep things easy for the contractors and working with the utility to apply more rigor to their manuals when needed.

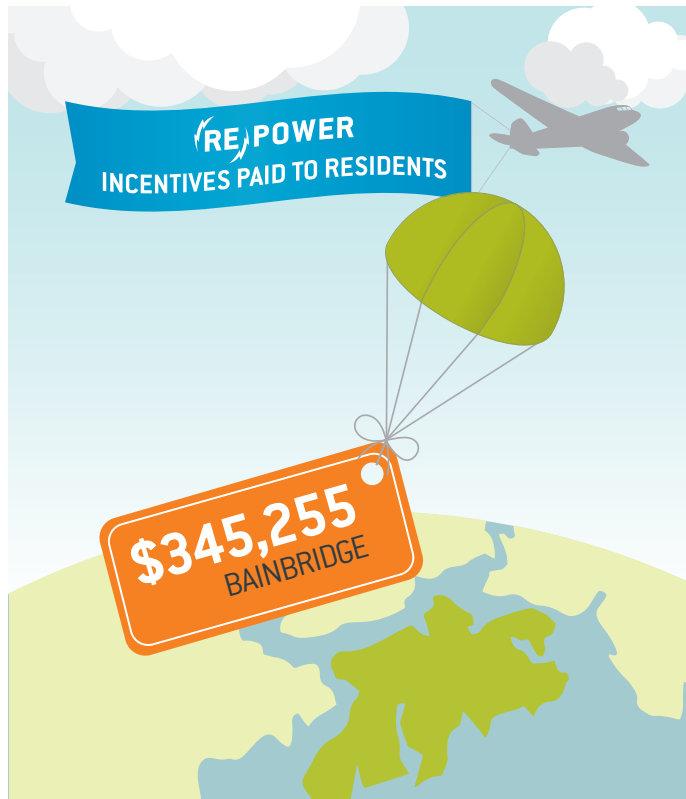
RePower switched specifications midway through the program to streamline efforts. It turned out to be beneficial for the program and contractors in the long run, but it would have been best to have this established from day one. Paperwork and rebate applications are always a barrier when working in weatherization programs. It is important that the QA inspector have all necessary forms and documents prior to the QA appointment. Having a complete file is the only way to do a thorough QA.

- It is best to develop your program specifications by starting with a utility weatherization manual and aligning program specifications as much as possible to streamline the process for contractors. You can always work with the utility to apply more rigor to their manuals when needed.
- Health, safety and CAZ testing is a large hurdle for contractors. If a weatherization contractor was not

BPI certified before the program, they are not used to identifying problems and testing combustion appliances. Common problems include small gas leaks, spillage on water heaters, the lack of carbon monoxide detectors and depressurization. It can also be a challenge to record test results completely and correctly. The only solution for this is multiple training sessions to ensure high quality CAZ tests.

- You can provide a certain amount of “conditional passes” to contractors on their first few jobs. For RePower, these items were given in the form of tips and FYIs, in addition to return-visits on subsequent jobs. This allows the quality to steadily improve until it’s ideal and consistent with all other contractors. These “conditional passes” should be chosen carefully.





- Obtain high-quality contractor work by building a workforce that is BPI certified.
- Utilize the results of your QA program and field findings to adjust your contractor training program. Address needs quickly as they arise and provide timely and frequent trainings.
- Periodically recognize and reward contractors for excellence in the field. A simple mention of high performing crew members in newsletters will go a long way in building good will, and can inspire others to do even better.

REBATES

Rebates are your carrot to move homeowners to take action. People want to save money, and rebates reduce financial barriers to completing home energy upgrades.

Coupled with the long-term energy savings, rebates allow residents to see the total cost benefits of making upgrades and weigh them against the out-of-pocket expenses.

RePower Rebate Structure

Based on the needs of our utility stakeholders and the community, RePower offered rebates for the following improvements:

- Utility incentive match for oil, propane and wood heated homes – homeowners in “non-utility” homes were offered the same weatherization and heating equipment benefits that electric and gas heated homes received from the utility.
- Whole house air sealing – Collaborated with Puget Sound Energy to pilot a performance test air sealing rebate. Incentive was based on accomplishing a minimum air leakage reduction of 400 cfm50. Reference the Whole House Air Sealing Incentive form for more details.
- Floor, attic and wall insulation
- Duct sealing and insulation
- High-efficiency furnaces and heat pumps
- RePower Reward – an additional \$400 was paid to homeowners who made two or more qualifying upgrades with a trade ally

- Oil tank decommissioning bonus (in conjunction with ductless heat pump rebate)
- Home Energy Assessment with EPS: rebate to encourage homeowners down the path of whole-home improvements, requiring air leakage testing and infrared imaging
- Whole Home Energy Upgrade rebate for all heating sources – a special rebate for homeowners who bundled multiple qualifying measures into one energy-efficiency upgrade project

Over the course of the program, RePower paid approximately \$345,255 in rebates to Bainbridge Islanders. These rebates triggered more than \$4 Million in homeowner investments!

LESSONS LEARNED Along the Way, We Learned...

- Engage non-utility heated customers (e.g., oil, propane and wood) because they typically do not have any other rebates available to them.
- Homeowners are deadline-driven and respond well to temporary promotional rebates. Change things up and try to get homeowners to act now through your marketing collateral and special offers.

Example – Our oil, propane and wood utility rebate match motivated many homeowners to switch to electric heat pumps. They enjoyed greatly reduced energy bills and now heat their homes with a much cleaner fuel, reducing their overall carbon footprint.

- Align with existing utility rebates to either add to existing rebates or supplement missing rebates that could be beneficial to your community. Encourage the utility to use your program as a pilot environment to test new measures and innovations.
- Use rebates to propel industry contractors to a higher level of quality. RePower decided to keep a separate air sealing rebate in place, on top of PSE’s air sealing rebate. This made the measure more sellable for contractors, more financially feasible, and ensured faster market adoption. More importantly, this “double” rebate on a brand new performance-based measure brought in the numbers needed to complete QA inspections and train contractors to properly install the measure.
- Create rebate paths that encourage multiple measures. RePower created an additional “Whole House Energy Upgrade Bonus” for completing three or more measures. A progressive incentive structure based on performance will encourage homeowners to complete larger scopes.
- For multiple-measure projects, take the rebate calculations out of homeowner and contractor hands. Have contractors provide the project scope and assign program staff to calculate the homeowner’s total incentives. This can be very helpful if homeowners are utilizing incentives from your program, local utilities and manufacturer rebates and/or tax incentives.
- Keep rebates simple. Rebate lists or guides can be confusing for homeowners. At one point RePower

had more than ten incentive forms in place, which quickly became confusing for both customers and program staff.

- Spend time on rebate terms and conditions to reduce customer confusion. Legal review is absolutely necessary.
- Use terminology and language that the typical homeowner can understand.
- Keep track of all your previous rebate forms and offerings and make sure to establish a version control system of rebate forms. Applicants who enrolled early in the program will need to be held to the terms and conditions that were in place at the time they enrolled, and as detailed on their forms. Detailed version control tracking will avoid any confusion regarding changing rebate structures and requirements.

ENERGY EFFICIENCY LOANS

RePower collaborated with Kitsap County, Washington State Department of Commerce, and Kitsap Credit Union to provide a program specific and custom designed loan program for participating homeowners. After slow initial loan uptake, RePower restructured its loan program to reduce the income cap and eliminate some other pre-qualification requirements. We also added a second lender, Puget Sound Cooperative Credit Union to offer a second financing option.

To encourage more whole house energy upgrades and more comprehensive job scopes, RePower collaborated with its lending partners to allow rebate checks to be directly applied toward energy efficiency loans. RePower set up a bonus incentive structure to encourage homeowners to complete larger projects, and then mailed incentive checks to the credit unions, instead of the homeowner. This agreement allowed homeowners to see a significant drop in their loan balances and average monthly payments within a month of taking out the loan. By encouraging contractors in our network to calculate deemed monthly energy savings per upgrade measure, homeowners using the loan could also compare deemed monthly savings to their monthly loan payments and were able to make highly informed decisions.

Once a lender partnership has been established, create synergy and momentum by educating the lender's internal staff about the program, including its goals and priorities. Provide a program overview and training to staff at all branches in your community. Lender staff training should include an overview of program requirements and should clearly detail the desired communications protocol between the program, the lender, participating contractors, and customers. Staff awareness about the credit union's energy efficiency loan offering was one of RePower's greatest challenges early on. An effective tool to inform Lender staff about program requirements is to conduct a diagnostic energy assessment at one of the staff's home.

To improve the customer experience, encourage the lender to assign specific staff who are well versed in the

energy-efficiency loan process, and understand eligible energy upgrade measures that may be included in the loan amount. To reduce lender risk and improve the lender experience, require loan applicants to use approved trade

allies. Loans tied to quality assured and performance tested jobs, installed by trained and certified professionals, will pose less risk to the lender and ensures customer satisfaction in energy and money savings.

The background of the image consists of numerous thin, light blue lines radiating from a central point, creating a sunburst or starburst effect. The lines are evenly spaced and extend to the edges of the frame.

**MARKETING
& OUTREACH**

CHAPTER 5.

MARKETING & OUTREACH

MARKETING

Marketing united all components of RePower to create a clear and compelling path for the community and contractors to engage. We developed high-energy and highly visible marketing to set RePower apart from other offers in the market, connecting residents of the county, trade allies and available offers. Our efforts combined education, outreach and successful partnerships to influence change, and boost the local economy through job creation.

RePower’s marketing approach was geared to meet the needs of this unique Island community, where neighbors look to each other as influencers in making short- and long-term decisions. Tactics included:

- Island dashboards showing real-time Island energy use—displayed online, in Island businesses, in ferry terminals—and alerting Islanders of power-down hours to mitigate high energy use
- Community mobilization, on-the-ground marketing highlighting Island residents who participated in RePower
- Trade ally engagement which transformed the market and created more than 50 new jobs

Our marketing approach was based on the existing community profiles and findings from community surveys and leaders. The primary conclusion: Capitalize on the strong sense of community and design marketing



campaigns as “community campaigns” rather than “utility programs.” This called for integrated marketing efforts—multiple methods of delivery and engagement—with all-encompassing community-based marketing involving the school system, non-profit organizations, the faith community, local businesses and local media, together with utility partners.

We first targeted customers with the largest energy efficient and peak-load-period gains, which would more easily demonstrate program success. We also targeted businesses, establishing a retail-discount program for community members. At the end of our first year, we launched campaigns and messaging thanking the community for their accomplishments, citing participating community groups and businesses.

Over three years, RePower achieved tremendous Island community awareness and participation rates. One in four Island homes completed an energy assessment and nearly 15 % of all Island homes were upgraded, with an average energy savings of above 30% per participating home.

TIPS ON HOW TO DEVELOP A COMMUNITY MARKETING PLAN

Do the research. Nothing turns an audience off more than marketing that clearly shows you have no idea what’s going on with the target audience and community. The goal is to determine who you’re marketing to and what’s important to them, along with the basics of demographics. Only after you have this information can you begin forming your marketing plan. Plus, research backs up your marketing efforts, letting the community and stakeholders know you’ve done the homework that will lead to results.

Example: Because approximately 73 percent of Island households were defined as “family” households, we networked with schools, their administration, parent-



teacher associations and especially students to help spread information about the program and start building lifetime energy champions.

The Island is also a transit-intensive community, where many residents leave home—and leave the Island—

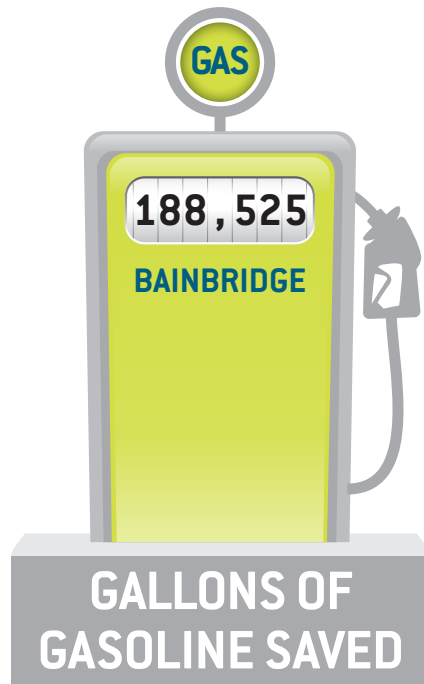


“That’s been one of my mantras—focus and simplicity. Simple can be harder than complex: You have to work hard to get your thinking clean to make it simple. But it’s worth it in the end because once you get there, you can move mountains.”

— STEVE JOBS

to go to work. As a result, we focused advertising in transit areas—particularly in ferry terminals and on the ferries themselves.

Keep verbal and visual messaging clear, compelling and simple. Energy, let alone energy efficiency, is complicated



and, by nature, invisible. Thus, we promoted high-level program benefits and easy next steps with one call to action, funneling everyone to the same web page or phone number where the details lived. For example, had we outlined all technical, electric and gas technology, contractor qualifications, and multiple ways to participate in our marketing campaigns and material, our audience would have been confused, progress slowed and results low. Marketing's job is to get the audience to respond and inquire. Let the call center, program coordinators and contractors do their job by providing the in-depth, technical detail.

LESSONS
LEARNED

Along the Way, We Learned...

- Provide progress updates. As a community-based program, it's important to let residents know how they are making an impact on the community. Throughout the life of the program, various marketing collateral communicated the amount of kilowatt hours saved as a result of energy upgrades. By the end of RePower, residents saved more than 6.9 million kilowatt hours of electricity, equivalent to 188,525 gallons of gasoline.

OUTREACH

Community outreach allows the program to reach local residents on a more personal and engaging level. There are several key components to keep in mind when developing a community outreach plan:

- **Hire within the community.** Local team members will have insight on best practices for reaching out to your community.
- **Build the foundation.** As recommended earlier, network with local community groups, businesses and their associated networks to introduce the program, raise awareness and build trust. Target organizations with a large number of employees, volunteers or members to further leverage support. Gain support from local government, civic and private community leaders and ask for their assistance in motivating their members to take action. Local leaders who are champions of the cause can influence how a community takes action while official letters from municipalities and utilities can directly impact participation levels for a program.
- **Engage the community.** Reach out to the community on various levels at various times. Be willing to be creative and flexible, using multiple approaches to inform and encourage participation. Approaches that worked well in one community or one sector of the community may not work well across the board. Multiple approaches, both general and targeted, are often needed to reach one community.



- **Create marketing collateral and campaign efforts specific to the residents, incorporating the community's values in the messaging.** Ideas include organizing a neighborhood or organizational challenge, sponsoring local events and hosting a program-specific event. Keep in mind that customers typically need to hear about the program a few times before they decide to participate. Studies conducted by the Washington State University Energy Extension Office have shown that customers in energy-efficiency programs need as many as 13 touch-points before they move forward with an energy upgrade.

- **General outreach improves the effectiveness of targeted marketing by raising overall awareness about the program.** It may not immediately bring people into the program but it can make homeowners more receptive to subsequent targeted marketing.
- **Build community relationships.** In small or tight-knit communities, residents will support programs which respect and care for their community.

Neighborhood Challenges

Active volunteers help reach residents and act as the liaisons between the community and program staff. It's important to build on outreach investment by focusing on one neighborhood for a period of time. Word-of-mouth can be an effective tool, but it takes multiple touches and time to spread the word and to build trust within an area. Here are some tips to consider when hosting neighborhood challenges:

- Use a participating neighbor as an example. Show the neighborhood how one evolves from an average homeowner to energy champion.
- Plan monthly meetings. Walk members through the upgrade process and keep them interested by teaching them something new at every meeting.
- Walk through the upgrade process. Start with the free home assessment followed by a Home Energy Assessment with EPS demonstration.

Invite program contractors to answer questions and provide bid proposals. Once the homeowner chooses a contractor, program staff should be on site to go over available rebates and provide a cost breakdown.

- Share the results. After the upgrades are made, invite the community over to experience the changes in the home. Let the volunteer share their experiences, including the financial benefits. Provide the group with toolkits to start their own energy-efficiency challenge.

Organizational Challenges

Organizational challenges can provide an effective way to reach larger audiences. The premise of the challenge is to offer financial awards to community businesses, groups and organizations that encourage their members to complete home energy-efficiency upgrades. Participating organizations can use awarded funds toward an energy-efficiency project of their choice. For example, they can use the fund to make upgrades to their own community building or donate energy-efficiency upgrades to another family or organization in need.

To increase member participation, it's important to have a clearly defined path, realistic goals and hard deadlines that align with the membership's size and interest. Lastly, thank the participants for participating and share their story with local media.

Neighborhood Blitz

A Neighborhood blitz is a specifically targeted pilot that is ideal for neighborhoods with an association, whether a homeowners' association (HOA) or a neighborhood association. This type of approach works best if there is already an established leadership and method of communication in place between leadership and members. You can leverage existing leadership to act as champions, communicating with and organizing their neighborhood.

Multiple meetings may be required to sell the idea and get buy-in from the larger group. Once the blitz is set, you can begin planning:

- Identify the carrot. The program has something additional to offer the group for committing to the blitz. This can be something the program offers, such as an additional financial bonus for making multiple upgrades or it can be a discount from the trade ally contractors. For example, RePower provided a free blower door test for all participants. This was an additional carrot that normally comes with a fee.
- Make the event fun. Work with the neighborhood to have a cookout or social event.
- Identify the way contractors should participate.
- Assign staff members to the blitz. You'll want at least one program person, who can act as a liaison to the neighborhood residents, and one a technical person, who can work with the participating trade allies and objectively answer technical questions for the homeowners.

LESSONS LEARNED

Along the Way, We Learned...

- Stick to promoting the program at events and locations that reinforce your objectives and goals. Vending at a local hardware store with energy-saving products is an ideal fit.
- Advertise the program's events in community calendars. This is often free.
- Coordinate a business or commercial-focused organizational challenge.
- Always staff your events with informed, friendly and outgoing team members.
- Customer service is paramount when working with large groups. Ensure members feel recognized for participating in the organizational challenge and look for ways to assist them in navigating through the program.
- Plan for the unexpected by building in more time than is required.
- Follow-up with both contractors and residents following a neighborhood blitz to keep momentum going.
- Develop specific marketing collateral and bring it to the neighborhood in advance. This helps residents know where to go for information and creates buzz in the neighborhood.

Refer to the Appendix for examples of successful marketing collateral and efforts.



**LOOKING
TOWARD
THE FUTURE**

CHAPTER 6. LOOKING TOWARD THE FUTURE


STRATEGY

An energy-efficiency program can operate under a number of umbrellas, ranging from a non-governmental organization business model, a private sector business model or a governmental business model. There are numerous variations within each business model that could be considered. The benefits and challenges of each business model will vary based on the community and program and must be taken into account prior to creation of the program. The governance structure will then dictate the financial structure, partners and stakeholders. Consequently, every energy-efficiency program will vary slightly in terms of their business model, funding stream and stakeholders. To ensure that the future of the program is secure and stable, long-term planning must be incorporated into the initial planning to launch a successful program from day one.

A growing organization needs a set of strategies to guide its program development, build a solid financial foundation, and prepare for challenges that lie ahead. A strategic plan is a tool that provides guidance in fulfilling a mission with maximum efficiency and impact. It determines where an organization is going over the next years, how it is going to get there and how it will know if it was successful.

A strategic plan also needs to incorporate sustainability planning. That involves more than simply funding to keep programs and the organization alive. It must address

program capacity, leadership capacity, financial capacity and adaptive capacity. Leadership capacity requires an examination and enhancement of staff, board members, volunteers, program partners and other program champions. Adaptive capacity means the organization will evaluate and make informed projections about external realities to help anticipate and respond to opportunities and challenges by clarifying mission and goals; targeting spending; expanding or contracting territory served; and restructuring programs, fundraising and other aspects of operations. As a rule, most strategic plans should be reviewed and revamped every three to five years.



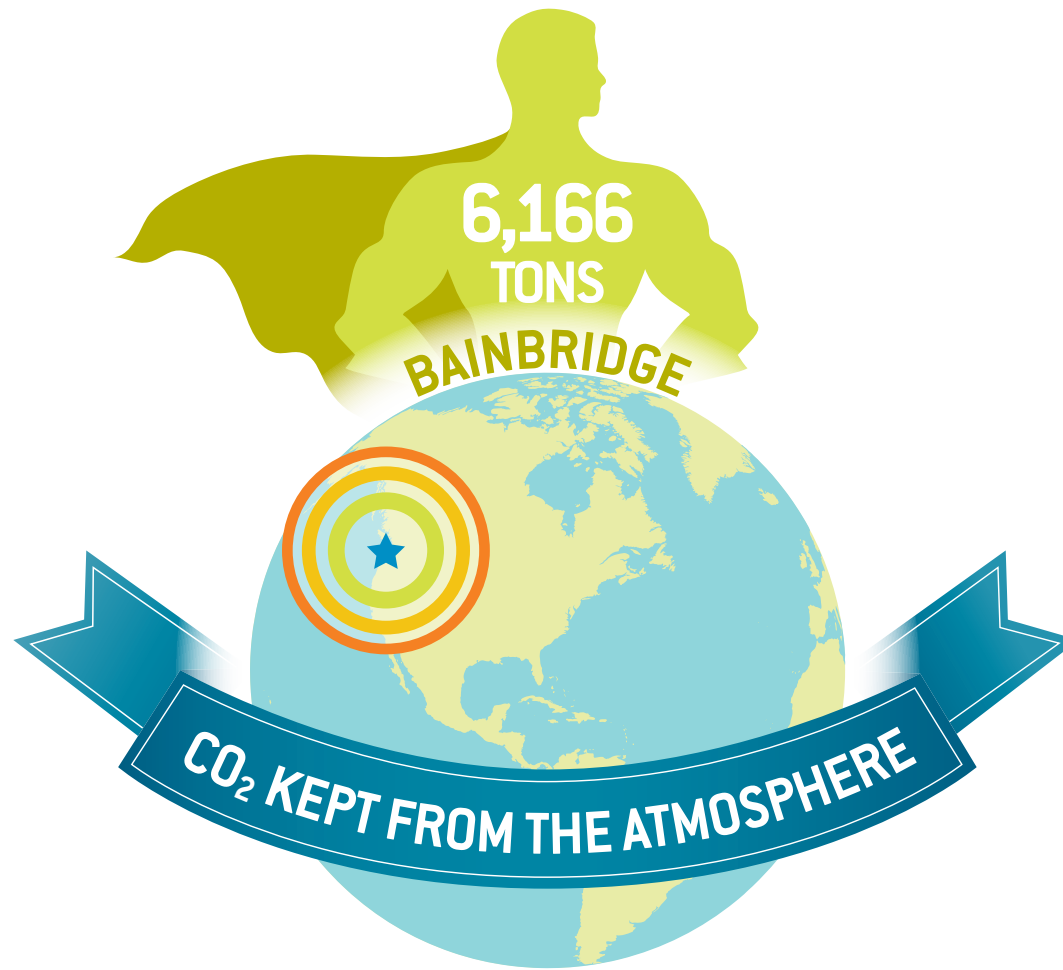
“Never doubt that a small group of thoughtful, committed citizens can change the world. Indeed, it’s the only thing that ever has.”

— MARGARET MEAD

Strategic planning is a partnership between the staff and stakeholders, with both groups participating equally. Although the ultimate goal of the strategic planning process is to develop a plan, the real value of the exercise lies in the process itself because it allows stakeholders an opportunity to learn more about the organization, to share their perceptions of its strengths and weaknesses, and to discuss critical issues affecting, or likely to affect, the organization in the future. It builds and strengthens bridges between the staff and stakeholders and provides

glue to hold them together over time. The process should be designed to generate decisions arrived at by consensus by a body of stakeholders as this distributes ownership of the plan, the organization and its future. A strategic plan produced by a single individual, although

arguably a quicker process, can never accomplish this feat. If started in the initial stages of a program or organization, a strategic planning process incorporating a body of stakeholders can set the stage for success—cohesive partnerships, long term sustainability and buy-in.



The image features a vibrant sunburst pattern in various shades of blue, radiating from a central point. The word "APPENDIX" is prominently displayed in the center in a bold, yellow, sans-serif font. The background consists of numerous thin, dark blue lines that create a sense of depth and movement, converging towards the center where the text is located.

APPENDIX

REPOWER BAINBRIDGE RESULTS

- Total homes upgraded: 968
- RePower Bainbridge has helped save more than 6.9 million kilowatt hours of electricity. This is enough to power 191 Island homes or 510 cars for one year. It is also the equivalent of 188,525 gallons of gasoline.
- RePower paid \$345,255 in incentives to Bainbridge Island.
- The total cost of RePower projects on Bainbridge Island is \$4,572,955 (i.e., this amount was paid to local businesses).
- The average number of improvements per home on Bainbridge Island is 1.96.
- 36% of Bainbridge Island homes received a home assessment
- 44% of Bainbridge Island homeowners made one improvement after receiving an assessment.
- 56% of Bainbridge Island homeowners who made more than one improvement after receiving an assessment.
- Bainbridge Island homeowners who participated in RePower now save an average of \$1,065.22 per year.
- The average cost per RePower project on Bainbridge Island was \$6308.
- The average rebate amount per customer on Bainbridge Island was \$571.38, representing 9% of the total job costs.

Data Results as of October 2013

FINAL BOARDING CALL EVENT COLLATERAL OVERVIEW SHEET

Conservation Services Group
REPOWER 'FINAL BOARDING CALL' CAMPAIGN



print advertising



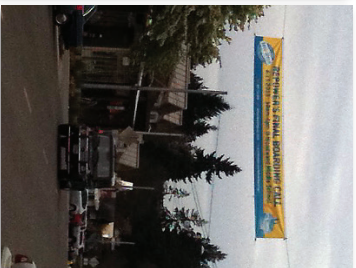
teaser poster



event poster



banners



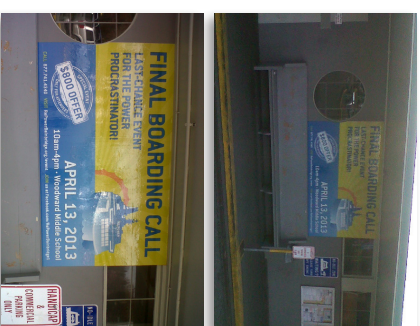
web graphics



print collateral



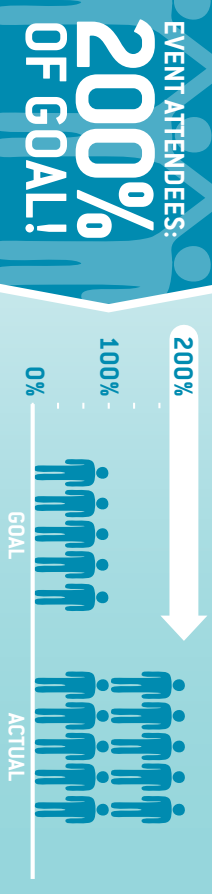
ferry terminal ads



REPOWER

“FINAL BOARDING CALL” EVENT RESULTS

FINAL BOARDING CALL: A free one-day event featuring trade allies, lenders, utilities and community organizations in one location to help homeowners complete home energy upgrades.
GOAL: Convert homeowners who received a FREE Home Energy Check-Up but have not yet made energy-efficiency improvements.



SUCCESS STORY

One particular property owner benefited from the one-stop-shop opportunity – she pre-qualified for the Whole House Energy Upgrade package for each of her six rental properties, connected with trade allies to schedule work, and received loan information from Puget Sound Cooperative Credit Union. The customer left the event with a clearly defined route for upgrading all her rental properties.

This story is just one example of how Repower’s “Final Boarding Call” helped homeowners and our partners. By the end of this one-day event, Kispap Credit Union and Puget Sound Cooperative Credit Union received approximately 30 leads, and Puget Sound Energy sold 123 lighting kits to 102 customers.

EXHIBITOR FEEDBACK

Lena Price, Air Masters Heating

We had many more leads at the event than we would at a local home show event in a 6-hour period.

Scott Park, Quality Heating

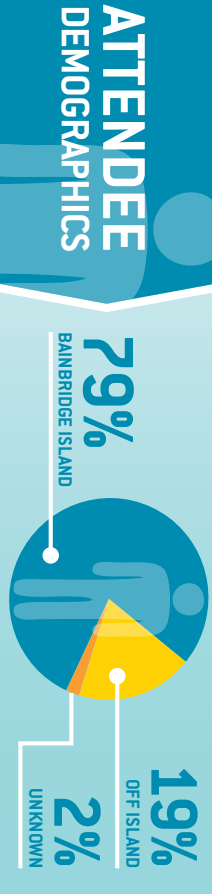
We received 30 leads/appointments from the event. We are extremely impressed with the focused group you were able to attract.

Rich Perlot, Heat Holders

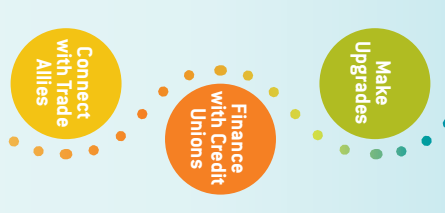
This was by far, the most productive event by a wide margin. The customer base was narrowly targeted, making every set of eyeballs a legitimate potential customer.

Cathie Currie, Puget Sound Energy

We sold 123 lighting kits to 102 customers, putting a total of 1,794 energy-saving products in customers’ hands. These should save our customers a total of \$160,558 over the life of the products, saving 983,055 pounds of carbon – the equivalent of taking 122 cars off the road for a year!



GET \$800 BACK PLUS OTHER REBATES



- Press tour prior to the event (resulting in prominent coverage)
- \$800 special event offer for attendees only
- Free
- Letters sent to residents through the City of Bainbridge Island
- Targeted, integrated marketing campaign

KEY INGREDIENTS + CLEAR PATH = SUCCESSFUL RESULTS

Conservation Services Group
REPOWER Q2 ADVERTISING CAMPAIGN



print advertising and posters



mobile advertising



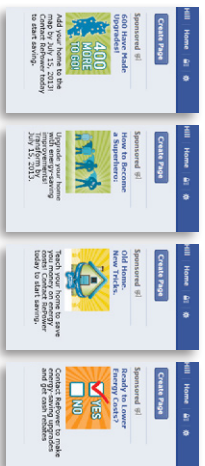
online advertising



ferry terminal advertising



facebook advertising



facebook wallpaper



REPOWER BAINBRIDGE



400 Winslow Way, E., Ste. 160
Bainbridge Island, WA 98110

Ph: 1.877.741.4340

Fax: 1.206.780.1545

info@repowerbainbridge.org

RepowerBainbridge.org

Contact Repower to schedule an appointment, follow-up about rebates and rewards, and ask general questions. Visit our website for a list of trade ally contractors, incentives, upcoming events and more!

PROGRAM COORDINATOR

Katie Jones

Ph: 1.206.866.0217

communities@repowerbainbridge.org

Katie is your Repower Community guide. Contact her to discuss your community's goals and strategies!

REPOWER HELP DESK



Mondays, 1 p.m. – 4 p.m.
(Walk-ins welcome during
Help Desk hours)

Ph: 1.206.866.0215

getadvice@repoweradvisor.org

ASK RICK!

Rick will provide objective technical expertise, help you understand contractor bids and answer questions about energy-efficiency upgrades.

ADDITIONAL LINKS

Department of Energy
eere.energy.gov/topics/homes.html

Washington State University
energy.wsu.edu/buildingefficiency/energycode.aspx

ENERGY STAR®
energystar.gov/

PUGET SOUND ENERGY (PSE)

Energy Advisors

Ph: 1.800.562.1482

pse.com/sav/ingsandenergycenter/pages/default.aspx

Contact PSE with questions about rebates and other information.

KITSAP CREDIT UNION

Ph: 1.360.662.2000 or 1.800.422.5852

kitsapcu.org

Call or visit a local branch for more information about the Energy Efficiency Loan Program.

POSITIVE ENERGY

Eric Rehm

221 Winslow Way W., P.O. Box 205

Marge Williams Center

Bainbridge Island, WA 98110

Ph: 1.206.842.4439

info@Positiveenergybi.org

positiveenergybi.org

Sign up to volunteer with Positive Energy, receive Twitter alerts, or learn more about the Island Energy Dashboards.

BAINBRIDGE ISLAND LIBRARY

1270 Madison Ave., N.

Bainbridge Island, WA 98110

Ph: 1.206.842.4162

kri.org/bainbridge-island

Contact the library to check out energy monitors or Blue-line cost monitors.

KITSAP SUN

Letters to the Editor

P.O. Box 259

Bremerton, WA 98337

letters@kitsapsun.com

Please note: letters should be typed and 250 words or shorter. Kitsap Sun reserves the right to reject, edit or condense all letters. Visit kitsapsun.com/forms/letters for complete requirements.

BAINBRIDGE ISLAND REVIEW

P.O. Box 10817

Bainbridge Island, WA 98110

Ph: 1.206.842.6613

editor@bainbridgereview.com

Every person and home makes an impact on Bainbridge Island and RePower wants to help you become a RePower Energy Champion and lead the next RePower Community. We encourage all groups—from congregations to book clubs to neighborhood associations—to get involved. Being an Energy Champion is as easy as 1-2-3.

STEP 1: SET YOUR COMMUNITY GOALS

Goal examples:

- Complete 25 in-home energy assessments
- Install 10 energy-efficiency improvements
- Reduce our collective energy use by 100 kWh each month

TOOLS TO REACH YOUR GOALS

RePower provides all the tools you need to achieve your goals and create a more sustainable Bainbridge Island.

Tools include:

- MyEnergy.com
RePower has partnered with MyEnergy.com—a free energy-tracking website—to help your group track its energy use, redeem special offers from local retailers for energy reduction and easily communicate with your team. Think of it as energy-related social media!
- [Newsletter templates](#)
Find a selection of templates you can use to update your group's goals, send energy-efficiency tips, event notices and more. Visit www.repowerbainbridge.org/community/repower to download the templates.
- [Newsletter templates](#)
Keep track of your group's progress and commitments on our easy-to-use forms.

STEP 2: SIGN-UP COMMUNITY MEMBERS

HOW TO PARTICIPATE

Energy Champions must collect a Commitment Sign-up Form with the names and expressed commitment from members of your group. All applications must be submitted by the identified Energy Champion. To qualify, group members must:

- Receive electricity from Puget Sound Energy
- Be in the City of Bainbridge Island
- Be single-family residences of up to four units

After signups are collected by the Energy Champion, a RePower representative will contact your members to schedule their FREE Home Energy Check-Up or Home Energy Assessments with EPS, educate them about the Energy Efficiency Loan Program from Kitsap Credit Union and connect them to trade ally contractors who can install their energy-efficiency improvements. Participants must be present at the time of their in-home assessment and quality control inspection of the completed improvement(s).

Please submit this application along with your completed forms to:

MAIL IT OR DELIVER

RePower Community, Attn: Katie Jones
400 Winslow Way, Suite 160
Bainbridge Island, WA 98110

FAX IT TO US

Fax: 206.780.1545

EMAIL IT TO US

communities
@repowerbainbridge.org

STEP 3: CELEBRATE YOUR COMMITMENT AND SUCCESS

Reward your group and let the entire community know you've made a commitment to Bainbridge Island. Here are a few simple ways you can celebrate:

- Facebook, Twitter and other social media websites are a great way to tell people that you've made a commitment
- Write an editorial for the local newspapers
- Create flyers or posters to display throughout the community
- Place a "My Home Makes an Impact" sign in your front yard

All RePower Community applications, forms and templates can be found at our website, www.repowerbainbridge.org. If you have questions please visit our website or contact Katie Jones at communities@repowerbainbridge.org or 206.866.0217.

REPOWER COMMUNITY NEWSLETTER

Completed
FREE Home Energy
Check-Ups
Goal:

Completed
Home Energy
Assessments with EPS
Goal:

Completed Upgrades
Goal:

Community member spotlight

Section suggestions:

- Introduce your team member (you may not all know one another)
- Highlight any special qualities or talents
- Get a good quote about why they joined your community group
- Ask for a photo you can place in the image section above

Delete italicized text to create your Spotlight section

Team Members or Group Name
(Type the names of your team
members or the name of your group)

Image

Section suggestions:

- A picture of your group in action
- A picture of a group member before & after shots of a home with energy-efficiency improvements

Delete italicized text to insert your image(s)

News and Updates

Provide the team with updates

Bright Idea

Section suggestions:

- Ask your group members to contribute information about what they've done to help meet the group (and/or personal) goals
- Use bullets or numbers to separate your ideas

Delete italicized text to create your Bright Idea section

Submitted by: (Type team member name here)

Upcoming Events

Add group or community events here.
Don't forget to list the time, date and place for each event.



RePower • 400 Winslow Way, Ste. 160 • Bainbridge Island, WA 98110 • 1.877.741.4340
info@RePowerBainbridge.org • Mon – Fri, 8 a.m. to 6 p.m. • General questions and appt. scheduling
RePower Help Desk • 1.206.866.0215
GetAdvice@RePowerAdvisor.org • Monday's from 1 p.m. to 4 p.m.
Call, email or visit our office for energy-efficiency advice and answers to your technical questions.

Whole House Air Sealing Incentive Application

For homes in Kitsap County



RePower's Whole House Air Sealing Incentive is available for homes in Kitsap County that achieve a minimum of 400CFM₅₀ reduction in total whole house air leakage. If combustion appliance zone (CAZ) health and safety requirements deem it necessary to replace an atmospheric water heater to proceed with whole house air sealing, an additional \$100 incentive shall be applied toward the purchase of an electric tank water heater or natural gas/propane on-demand or direct-vent water heater which meets Puget Sound Energy (PSE) or Cascade Natural Gas Corporation qualifying efficiency standards for water heater incentives. If the whole house air sealing is completed or test-in reveals whole house air sealing is not an option, the homeowner is eligible for a \$100 Blower Door Incentive.

Home Details

Year Built: 1969	Sq. Ft.: 900	Avg. Ceiling Height: 12
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Whole House Air Sealing Results

Test-in	CFM ₅₀	Test-out	CFM ₅₀	Total Reduction	CFM ₅₀
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Select Eligible RePower Incentive(s)	Amount
<input type="checkbox"/> Whole House Air Sealing	\$300
<input type="checkbox"/> Blower Door Test	\$100
<input type="checkbox"/> Atmospheric Domestic Hot Water Replacement	\$100
Total	

Terms & Conditions

- RePower Whole House Air Sealing Incentives are available April 1, 2012 – March 31, 2013 and will take up to six weeks to process.
- RePower incentive payments are made directly to the Participant (homeowner).
- Whole House Air Sealing work and Incentive application must be completed by a RePower trade ally.
- Technician performing Blower Door test must be Building Performance Institute (BPI) certified.
- Trade ally must install mechanical ventilation if the house is sealed to less than 70 percent of the Building Airflow Standard.
- If combustion appliances are present, all combustion safety testing must be performed to BPI specifications for test-in and test-out.
- Participants who receive an Energy Performance Score (EPS) must complete Whole House Air Sealing to qualify for the Blower Door test Incentive.
- Prior to any payment of Incentives, Participant may be selected for a quality assurance inspection.
- Participant understands Conservation Services Group (CSG) does not supervise work performed and is not responsible for proper completion, work or performance of any products purchased.
- CSG does not guarantee any particular energy-savings results by its approval of the Incentive application.
- Participants who previously received a RePower Reward and performed air sealing as one of the two measures may qualify for the Whole House Air Sealing Incentive upon completion of a Blower Door test and receiving results to determine the potential of 400CFM₅₀ reduction.

Please send all applications to RePower:

Mail: 400 Winslow Way E., Suite 160, Bainbridge Island, WA 98110 Email: info@repowerkitsap.org Fax: 206-780-1545
Page 1 of 5

WHOLE HOUSE AIR SEALING INCENTIVE APPLICATION (2 OF 5)

Whole House Air Sealing Incentive Application

For homes in Kitsap County



Participant Signature (All information is required to process incentive for payment.)

By signing below, Participant agrees to the terms and conditions of this application, and authorizes a RePower trade ally to submit this application and all associated invoices to RePower on behalf of the Participant, for all RePower incentives. By that authorization, Participant represents to RePower that all measures have been satisfactorily completed as of the signature date below, and any accompanying invoices or measure documentation are complete and accurate.

Name	Signature
Address	Phone
Date	

RePower Trade Ally Signature (All information is required to process incentive for payment.)

By signing below, RePower trade ally certifies that this application and any accompanying invoices or measure documentation are complete and accurate, and all measures associated with this incentive request were completed as of the signature date below. Incentives are payable to Participants only.

Trade Ally Name	Phone
BPI Certified Technician Name	Signature
Date	

Please send all applications to RePower:

Mail: 400 Winslow Way E., Suite 160, Bainbridge Island, WA 98110 Email: info@repowerkitsap.org Fax: 206-780-1545
 Page 2 of 5



Whole House Air Sealing Incentive Application

For homes in Kitsap County

Test-in date: Check here if all appliances are electric
 Outside Temperature:

Test-In Combustion Safety and Carbon Monoxide

Baseline Pressure:	House=	CAZ #1=	CAZ #2=
Ambient CO:	House=	CAZ #1=	CAZ #2=
Gas-Leak Detection:	<input type="checkbox"/> Pass	<input type="checkbox"/> Fail	Leak Location:

CAZ Worst-Case Scenario Depressurization

	BPI Limit	CAZ #1	CAZ #2
Orphan natural draft water heater (including outside chimneys)	-2 _{Pa}	Pa	Pa
Natural draft boiler or furnace vented with water heater	-3 _{Pa}	Pa	Pa
Individual natural draft boiler or furnace			Pa
Natural draft boiler or furnace with vent damper vented with water heater	-5 _{Pa}	Pa	Pa
Natural Draft Water Heater (not orphaned)			
Mechanically assisted draft boiler or furnace vented with water heater			
Mechanically assisted draft boiler or furnace alone, or fan assisted DHW alone	-15 _{Pa}	Pa	Pa
Chimney-top draft inducer (Exhausto-type or equivalent)	-50 _{Pa}	Pa	Pa
Sealed combustion appliances or high static pressure flame retention head oil burner			
<input type="checkbox"/> Failed in worst case scenario / tested in natural conditions			

Heating Systems	Location	Sealed Combustion	Spillage (Worst Case)	Spillage (Natural)	Draft (Pa)	CO (PPM)	SSE
Water Heater 1		<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Pass <input type="checkbox"/> Fail	<input type="checkbox"/> Pass <input type="checkbox"/> Fail	Pa	Pass <input type="checkbox"/> Fail	
Water Heater 2		<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Pass <input type="checkbox"/> Fail	<input type="checkbox"/> Pass <input type="checkbox"/> Fail	Pa	Pass <input type="checkbox"/> Fail	
Heating System 1		<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Pass <input type="checkbox"/> Fail	<input type="checkbox"/> Pass <input type="checkbox"/> Fail	Pa	Pass <input type="checkbox"/> Fail	
Heating System 2		<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Pass <input type="checkbox"/> Fail	<input type="checkbox"/> Pass <input type="checkbox"/> Fail	Pa	Pass <input type="checkbox"/> Fail	

Appliances	Fuel	Proper Venting	CO (PPM)
Oven	<input type="checkbox"/> Gas <input type="checkbox"/> Electric	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Dryer	<input type="checkbox"/> Gas <input type="checkbox"/> Electric	<input type="checkbox"/> Yes <input type="checkbox"/> No	

Blower Door Test-In Results

House Pressure	Fan Pressure	Ring Size	Test Location	Outside Wind Speed
Pa	Pa	<input type="checkbox"/> O <input type="checkbox"/> A <input type="checkbox"/> B <input type="checkbox"/> C		<input type="checkbox"/> None <input type="checkbox"/> Low <input type="checkbox"/> High

CFM ₅₀	ACH ₅₀	Building Air Flow Standard	Mechanical Ventilation Required
		CFM ₅₀ <input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

Convert CFM₅₀ to ACH₅₀: (CFM₅₀ X 60) / house volume.
 Mechanical ventilation is required when final CFM₅₀ is less than 70 percent of the Building Air Flow Standard.
 Calculate Minimum Ventilation Level on next page.

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Whole House Air Sealing Incentive Application

For homes in Kitsap County



Minimum Ventilation Level Measurement (MVL)—Calculation is required before performing air sealing on all homes:

Ventilation Potential = Airflow x N Where N = LBL conversion factor (If MVL is greater than Ventilation Potential, Mechanical Ventilation is required.)

Complete MVL Using One of the Formulas Below

<input type="checkbox"/> MVL based on known occupancy occupants x 15 CFM =	<input type="checkbox"/> MVL based on number of bedrooms {bedrooms + 1} x 15 CFM =	<input type="checkbox"/> MVL based on ACH _{nat} and volume (0.35 ACH _{nat} x volume) / 60 =
Blower Door Location =		Blower Door Make/Model=

Ventilation System

If approved mechanical ventilation — a system which meets local building code requirements—strategy exists, MVL threshold may be waived

NOTE: incentives will not be paid on a project when the MVL is greater than ventilation potential, unless an approved mechanical ventilation strategy exists.

<input type="checkbox"/> Continuous-rated fan with programmable timer
<input type="checkbox"/> Mechanical damper with 24-hour timer
<input type="checkbox"/> Other

Participant was given Existing Homes notification of the MVL of the unit.

COMPLETE SECTION BELOW IF WHOLE HOUSE AIR SEALING WAS PERFORMED FOR THIS HOMEOWNER

Check Areas Where Air Sealing Was Completed

Attic	Floor / Crawlspace	Windows and Doors	Walls	Other (list)
<input type="checkbox"/> Chases	<input type="checkbox"/> Chases	<input type="checkbox"/> Trim	<input type="checkbox"/> Chimney	
<input type="checkbox"/> Chimney / Flue	<input type="checkbox"/> Plumbing	<input type="checkbox"/> Weatherstripping	<input type="checkbox"/> Baseboards	
<input type="checkbox"/> Access Doors	<input type="checkbox"/> Access Doors	<input type="checkbox"/> Door Sweeps	<input type="checkbox"/> Sill Plates	
<input type="checkbox"/> Top Plates	<input type="checkbox"/> Electrical	<input type="checkbox"/> Basement Windows	<input type="checkbox"/> Outlets	
<input type="checkbox"/> Can Lights	<input type="checkbox"/> Band Joist	<input type="checkbox"/> Replacement		

Notes:

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 Page 4 of 5

Whole House Air Sealing Incentive Application



For homes in Kitsap County

Test-out date: Check here if all appliances are electric

Test-out Combustion Safety and Carbon Monoxide

Baseline Pressure:	House=	CAZ #1=	CAZ #2=
Ambient CO:	House=	CAZ #1=	CAZ #2=
Gas-Leak Detection:	<input type="checkbox"/> Pass	<input type="checkbox"/> Fail	Leak Location:

CAZ Worst-Case Scenario Depressurization

	BPI Limit	CAZ #1	CAZ #2
Orphan natural draft water heater (including outside chimneys)	-2 _{Pa}	Pa	Pa
Natural draft boiler or furnace vented with water heater	-3 _{Pa}	Pa	Pa
Natural Draft Water Heater (not orphaned)	-5 _{Pa}	Pa	Pa
Individual natural draft boiler or furnace			
Natural draft boiler or furnace with vent damper vented with water heater			
Mechanically assisted draft boiler or furnace vented with water heater			
Chimney-top draft inducer (Exhausto-type or equivalent)	-15 _{Pa}	Pa	Pa
Sealed combustion appliances or high static pressure flame retention head oil burner	-50 _{Pa}	Pa	Pa
<input type="checkbox"/> Failed in worst-case scenario / tested in natural conditions			

Heating Systems	Location	Sealed Combustion	Spillage (Worst Case)	Spillage (Natural)	Draft (Pa)	CO (PPM)	SSE
Water Heater 1		<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Pass <input type="checkbox"/> Fail	<input type="checkbox"/> Pass <input type="checkbox"/> Fail	<input type="checkbox"/> Pass <input type="checkbox"/> Fail		
Water Heater 2		<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Pass <input type="checkbox"/> Fail	<input type="checkbox"/> Pass <input type="checkbox"/> Fail	<input type="checkbox"/> Pass <input type="checkbox"/> Fail		
Heating System 1		<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Pass <input type="checkbox"/> Fail	<input type="checkbox"/> Pass <input type="checkbox"/> Fail	<input type="checkbox"/> Pass <input type="checkbox"/> Fail		
Heating System 2		<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Pass <input type="checkbox"/> Fail	<input type="checkbox"/> Pass <input type="checkbox"/> Fail	<input type="checkbox"/> Pass <input type="checkbox"/> Fail		

Appliances	Fuel	Proper Venting	CO (PPM)
Oven	<input type="checkbox"/> Gas <input type="checkbox"/> Electric	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Dryer	<input type="checkbox"/> Gas <input type="checkbox"/> Electric	<input type="checkbox"/> Yes <input type="checkbox"/> No	

Blower Door Test-Out Results

House Pressure	Fan Pressure	Ring Size	CO Alarm Installed	Outside Wind Speed
Pa	Pa	<input type="checkbox"/> O <input type="checkbox"/> A <input type="checkbox"/> B <input type="checkbox"/> C	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> None <input type="checkbox"/> Low <input type="checkbox"/> High

CFM ₅₀	ACH ₅₀	Building Air Flow Standard	Mechanical Ventilation Required
			CFM ₅₀ <input type="checkbox"/> Yes <input type="checkbox"/> No

Document whole house air sealing results on page 1.

Submit

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400 Winslow Way E #160
Bainbridge Island, WA 98110
877.741.4340

Energy Upgrade Survey

More than 2,000 Bainbridge residents have taken steps to create a bright energy future for our community. Now, it's time to share our success!

To recognize all residents' energy upgrade work, RePower needs to hear from you!

Please tell us about any energy-efficiency improvements you've made in your home since November 2010. Your answers will help us improve RePower Bainbridge, learn more about upgrades being completed, identify training needs for our contractors and report our community's success. Please complete this survey and return it in the enclosed envelope by **April 5, 2013**. Results are confidential.

TO THANK YOU FOR COMPLETING OUR SURVEY, PLEASE ENJOY THE ENCLOSED COUPON FOR \$5 OFF AN LED LIGHT BULB FROM ACE HARDWARE!

Name: _____ Phone: _____

Street Address: _____ Zip Code: _____

E-mail Address: _____

GENERAL INFORMATION

1. Our records indicate you received a home energy assessment between November, 2010 and January 31, 2013. Have you completed any energy upgrades to your home since then?
 Yes *(please go to question 2)* No *(please skip to page 5)*

THANK YOU FOR COMPLETING ENERGY UPGRADES IN YOUR HOME!

PLEASE TELL US ABOUT THE IMPROVEMENTS YOU INSTALLED:

2. Who installed the energy upgrades in your home?

- Contractor / Business – Name(s) _____
- I did it myself Date work was completed: _____

3. Did you use an energy-efficiency loan to help pay for your energy upgrade(s)?

- Yes, I used Kitsap Credit Union Yes, I used Puget Sound Cooperative Credit Union
- Yes, I used: _____ No

WATER HEATING SYSTEMS

4. Did you upgrade your home’s water heating system?

- Yes No (go to question 5)

If yes, what type of system did you upgrade to? If possible, provide the model # and/or efficiency rating.

- Oil/propane water heater Electric tankless water heater Natural gas water heater
- Oil/propane tankless water heater Electric heat pump water heater Other _____

Model #: _____ AFUE or EF rating: _____

HEATING SYSTEMS

5. Did you upgrade your home’s heating system?

- Yes No (go to question 6)

What type of system did you upgrade to? Provide the model # and/or efficiency rating of your equipment:

- Air source heat pump Oil/propane furnace Oil/propane boiler
- Ductless heat pump Electric furnace (forced air) Wood stove/fireplace
- Geothermal heat pump (ground source) Electric boiler (hydronic) Other _____

Model #: _____ AFUE or EF rating: _____

AIR SEALING AND INSULATION

6. Was air sealing performed in your home?

- Yes
- No

If yes, provide the air sealing values your contractor provided:

PRE-upgrade: _____ POST-upgrade: _____

7. Did you upgrade the insulation in your home?

- Yes
- No (go to question 8)

Which area(s) did you upgrade? (Check all that apply)

Attic OLD R-value: _____ NEW R-value: _____

Approximate square footage of new insulation installed: _____

Floor OLD R-value: _____ NEW R-value: _____

Approximate square footage of new insulation installed: _____

Wall OLD R-value: _____ NEW R-value: _____

Approximate square footage of new insulation installed: _____

Ducts OLD R-value: _____ NEW R-value: _____

Approximate linear footage of new insulation installed: _____

8. Was duct sealing performed in your home?

- Yes
- No

PRE-upgrade: _____ POST-upgrade: _____

WINDOWS

9. Did you install energy-efficient windows in your home?

- Yes
- No (go to question 10)

What type of windows did you install?

U-value of your new windows: _____ Approximate square footage of new windows: _____

SOLAR

10. Did you install a solar photovoltaic (PV) energy system?

- Yes
- No

If yes, answer the following:

What is the PV system size: _____ KW

If you didn't install a solar PV energy system, would you like to be contacted to learn more about solar PV for your home, and related financial incentives?

- Yes
- No

APPLIANCES

11. Did you upgrade to an ENERGY STAR® refrigerator or freezer?

- Yes
- No

12. Did you upgrade to an energy-efficient clothes washer or dryer?

- Yes
- No

OTHER ENERGY-EFFICIENT IMPROVEMENTS

13. Did you complete other energy-efficiency improvements that are not mentioned on this survey?

- Yes
- No

If yes, explain:

14. May we contact you to discuss your survey answers?

- Yes
- No

15. How could RePower Bainbridge provide better service to customers and facilitate the completion of energy-efficiency improvements?

Thank you for taking the time to fill out our survey. We rely on your feedback to help us improve our services. Your input is greatly appreciated.

IF YOU HAVE NOT COMPLETED ANY ENERGY UPGRADES, PLEASE FILL OUT THIS SECTION

A. What has prevented you from making energy-efficient improvements to your home?

- I need more information about which upgrades are best for my home
- I haven't found a qualified contractor
- Recommended upgrades are too expensive
- I want to include improvement(s) in a future remodel
- I haven't had time to receive contractor bids
- I need assistance to review contractor bids and make the best decision for my home
- I am a renter and do not own my residence
- Upgrading my knob-and-tube wiring is too expensive
- I am going to sell my home or am in the process of selling my home
- Other _____

B. Are you planning to complete any energy-efficiency upgrades in your home this year?

- Yes
- No
- Maybe

If yes, please tell us which energy-efficiency upgrades you plan to install and when:

Upgrade(s): _____

Estimated timeframe: _____

C. How could RePower Bainbridge help you complete energy-efficiency upgrades by July 15, 2013?

(Grant deadline)

- Provide technical assistance
- Provide information about financing options
- Connect me with a qualified contractor
- Provide information about incentives and rebates
- Offer homeowner training on planning energy-efficient upgrades
- Other: _____

D. How could RePower Bainbridge provide better service to customers and facilitate the completion of energy-efficiency improvements?

E. Are you aware that RePower Bainbridge partners with two credit unions that provide energy-efficiency improvement loans?

Yes, I looked into it but did not qualify to receive a loan No, I was not aware of the loan programs

Yes, but I am not interested in financing options No, and I am not interested in financing options

Yes, but there are financing options I like better (please complete):

Other:

F. Other comments / feedback:

Did you know that RePower is currently offering a Whole House Energy Upgrade bonus rebate? Get up to \$3,500 in rebates when you install three or more qualifying energy-efficiency improvements. Call 877.741.4340 or visit RePowerBainbridge.org for more information.

Thank you for taking the time to fill out our survey. We rely on your feedback to help us improve our services. Your input is greatly appreciated.

RePower Quality Control Policies and Procedures

I. Summary

Home improvements promoted by the RePower Program are expected to deliver long-term benefits such as energy savings and improved comfort in the home. In order to ensure that homeowners receive these benefits, RePower completes Quality Control inspections on a minimum of 10% of known energy efficient home improvements completed under the RePower Program. The purpose of this document is to outline the Quality Control and Problem Response procedures for the RePower Program in Bainbridge Island and Bremerton, WA.

Jobs selected for Quality Control inspections will receive a rating of "Pass," "Needs Minor Corrective Action," or "Needs Major Corrective Action." The ratings are based on best practices according to the current RePower Weatherization Specifications Manual. Typically most inspections pass or receive minor feedback that seeks to improve the quality of work.

In the event that problems are found and a measure requires corrective action, contractors are required to perform the identified corrective actions at no additional cost to the customer within the specified time period. Repeated occurrences of an individual problem or serious problems that affect the health and safety of a home will result in a performance improvement plan or suspension from the program.

If the contractor sub-contracts work, it is the responsibility of the primary contractor or the signatory on the incentive application materials to ensure compliance with program standards and guidelines. In special circumstances, waivers may be available when unusual conditions prevent specifications from being met. For greater detail regarding specifications and the waiver process, download the 2011 RePower Weatherization Specifications Manual from the RePower website.

II. Quality Control Selection and Inspection Process

1. Ten percent of the RePower rebate applications are randomly selected for quality control inspection. RePower staff attempts to schedule an appointment with the homeowner within one week of selection.

- **Remember:** In circumstances where a home is found to be below the national standards for Minimum Ventilation Level, contractors shall submit a RePower Minimum Ventilation Notification letter to the homeowner even when mechanical ventilation exists. A copy of the aforementioned letter can be found on the contractor page of the RePower website. **The homeowner should have this letter prior to quality control inspection.**

2. The quality control inspector visits the applicant's home and conducts an inspection on measures for which the participant has applied for a RePower rebate. The purpose of the quality control inspection is to assure compliance with the 2011 RePower Weatherization Specifications Manual. No warranties of any kind are implied by the quality control inspection. To document this process the inspector completes a RePower Quality Control Post Job Inspection Form.

3. While in the home, the quality control inspector notifies the homeowner whether the work has received a rating of "Pass," "Needs Minor Corrective Action," or "Needs Major Corrective Action."

- If the job does not pass:
- The quality control inspector explains to the participant why the job needs corrective action
- The contractor is responsible for the cost of all corrective actions
- The incentive payment will not be released until corrective action is taken and the job has passed re-inspection;
- If the work Does Not Qualify and the problems cannot be remedied, the contractor is obligated to reimburse the participant for the incentive(s).

4. The quality control inspector submits RePower Quality Control Post Job Inspection Form to the RePower Customer Service Representative to document the inspection.

5. The quality control inspector sends an e-mail notification to the contractor, indicating the results of the inspection.

- If the inspection passes:
- RePower staff processes the incentive application to release payment to the participant.
- If the job needs Minor or Major Corrective Action:
- The quality control inspector explains the results and necessary corrective action to the contractor through a written report and a phone call. The contractor has 10 business days to improve the quality or completeness of the work as identified by the quality control inspector.
- Quality control inspector re-inspects the applicant's house and provides an updated rating.
- Payment is released for jobs requiring corrective action when the job has achieved a "Pass" rating.

III. Quality Control Ratings

1. **PASS:** The work was satisfactorily completed as stated on the incentive application and is in compliance with the RePower Weatherization Specifications Manual. No corrective actions are necessary.

2. **NEEDS MINOR CORRECTIVE ACTION:** The work was completed, but has minor problems with the job quality, as defined by the Weatherization Specifications Manual. Problems may include items which appear to have been overlooked by the contractor and have a minor impact on the future energy savings or overall job quality.

- Minor details are missing from the work.
- Example: Missing or improperly installed weather-stripping.
- Example: Minor voids in insulation or baffling.
- Example: Duct insulation is missing in small areas.
- Example: Furnace is correctly installed, but is missing the required duct test sticker.

3. **NEEDS MAJOR CORRECTIVE ACTION:** The work was completed with major problems and is not in compliance with the Weatherization Specifications Manual. Errors identified during the Quality Control inspection are seen to have a major impact on health, safety, energy savings, or building durability due to poor workmanship or sub-standard materials. When Major Corrective Action is required, RePower reserves the right to inspect other jobs completed by the contractor (within the same time period and with similar measures) and require repairs, if needed.

- Work created an indoor air quality hazard.
- Example: Propane water heater is installed within the conditioned space of a home and fails the combustion safety test.
- The work is incomplete.
- Example: Condensate drain is missing or not corrected properly for a newly installed furnace.
- Example: Floor insulation was installed to improve from existing insulation from R-6 to R-30; however a significant portion of the floor was not improved.
- Multiple infractions were found.
- Example: Insulation was not secured to attic hatch, gaps were seen around bathroom exhaust fan duct, and baffles extended less than 4" above level of insulation. This needs major corrective action due to multiple violations with the specifications on attic insulation.
- Example: New water heater was installed but failed combustion safety test and has no earthquake strap.
- Repeated minor infractions of the same type from the same trade ally.
- Example: Incentive application materials show that 1,000 square feet of wall insulation was installed; however, the quality control inspection proved only 600 square feet of insulation was installed. The contractor or trade ally has repeatedly reported erroneous square footage. The pattern of documentation discrepancies warrants major corrective action.
- **Does Not Qualify (DNQ):** The work completed does not qualify for an incentive listed on the RePower incentive application. This could occur due to the inclusion of false information regarding the efficiency rating, size, or fuel source of the home improvement. A DNQ is considered a serious program violation and the incentive(s) applied for should be reimbursed to program participants by the contractor.
- Example: Ductwork was sealed or insulation installed in the conditioned space of a home. This would not qualify for an incentive because the main purpose of weatherization measure installations is to prevent winter-time heat loss from conditioned space to unconditioned space.
- Example: A .80 AFUE furnace was installed correctly; however, the efficiency requirements of the rebate (.90 AFUE) have not been met.

<p>○ Example: Incentive application is submitted for a high-efficiency propane water heater; however, the equipment installed utilizes electricity as its fuel source. This work does not qualify for a RePower Rebate because the home has a primary fuel source other than oil or propane.</p> <p>IV. PROBLEM Response Procedure</p> <p>1. PROBLEM Identification – A PROBLEM can be identified by anyone, including (but not limited to) CSG, the sponsor, the implementing contractor or the PARTICIPANT. However, only a CSG employee may initiate a PROBLEM Disposition Form (PDForm). Those employees in the regional offices that may initiate a PDForm will be designated by the Regional VP.</p> <p>The following is a list of potential PROBLEMS for which CSG might implement this PROBLEM Response Procedure. This list is not exhaustive. These are examples only and not a complete list.</p> <ul style="list-style-type: none"> ● <u>Safety/Standard Violation</u>: Conducting work in a manner that violates OSHA regulations or in general represents a safety hazard to contractors, PARTICIPANTS, or any other members of the program or public. ● <u>Poor Work Quality</u>: Multiple failures to have the same work pass inspection for reasons enumerated in a prior inspection or other items such as those outlined below: (looking for trends & patterns) <ul style="list-style-type: none"> ○ Program not implemented in accordance with requirements ○ Equipment not installed in accordance with requirements ○ Overall quality of work is deficient (based on established program standards) ○ Failure to Comply with program administrative and reporting requirements ● <u>Untimely Corrections</u>: Failure to remedy identified work PROBLEMS after notification, without change, in accordance with specifications: (a) any failure to satisfy the program standards, or (b) any damage to a PARTICIPANT'S property resulting from an installation under the program specifications. <ul style="list-style-type: none"> ● <u>Failure to Comply with:</u> <ul style="list-style-type: none"> ○ A provision of law ○ A utility policy, rule, regulation, guideline, or instruction applicable to all participants of the same program ○ A specific program requirement ● <u>Fraud</u>: Steering a PARTICIPANT away from the program for some type of personal or professional gain. <p>2. PROBLEM Response</p> <p>Once a concern is identified with a contractor, CSG will perform an evaluation of the facts to determine if there is an actual PROBLEM. A more serious situation (such as a health and safety concern) would require more prompt treatment (24 – 48 hours). Upon determination of a PROBLEM, CSG will inform the contractor of the PROBLEM and the intended CSG action or actions. Actions will include one or more of the following progressive steps. However, CSG reserves the right to move to any step at any time CSG deems warranted based on the circumstances.</p> <ol style="list-style-type: none"> 1. Written report 2. Probation 3. Removal from the program <p>3. Level 1: Written Report</p> <p>Applicability: Most situations would likely fall in this category. The idea is to provide some prompt written feedback to improve the contractor's performance. <i>This will apply when work is rated as "Needs Minor or Major Corrective Action."</i></p> <p>In some cases in which a PROBLEM is identified with a contractor, this may be addressed by a member of the CSG program team by providing a simple written correction and instruction. Depending on the response of the contractor, this may be all the action necessary. If a PROBLEM is identified (with the quality or completeness of work performed in a home or business), the contractor has ten (10) business days to correct that work to the satisfaction of CSG.</p>
--

4. **Level 2: Probation**
Applicability: This situation would apply a smaller percentage of the time where the contractor is viewed as having the right motivation but requiring some on-going assistance to correct performance. *This could apply after repeated ratings of “Needs Minor or Major Corrective Action.”*

For repeat occurrences of an individual PROBLEM (or a series of different PROBLEMS), CSG may elect to place the contractor on a Performance Improvement Plan. This plan will be a brief document that outlines the specific PROBLEM(S), the actions that must be taken to correct the PROBLEM(S) and the date by when the actions must occur. This situation would especially apply in the case where the contractor provides a unique service (in other words, we want to keep the contractor) but has had minor recurring performance PROBLEMS.

5. **Level 3: Suspension from the Program**

Applicability: This situation would apply a small percentage of the time. In this case the potential problem is serious or recurring. There is some investigation that must be accomplished but the seriousness of the concern warrants immediate action. *This could apply after repeated and/or egregious problems with work resulting in ratings of “Needs Major Corrective Action.”*

Removal Notification – a written notification must be sent to the contractor that provides specific information. When CSG determines that adequate grounds exist for possible or actual contractor removal, the contractor involved will be notified of the proposed action by certified mail. The notice will provide:

- The date of the removal, which may be the date the contractor is informed
- The time period of the removal (which may range from 45 calendar days to indefinite)
- A description of the grounds for the proposed action
- What is the category of the situation (as further described below):
 - **A. Conference Meeting:** the contractor will be invited to have a conference meeting to make their case but continue to work in the program.
 - **B. Emergency Suspension:** the concerns with the contractor are such that immediate suspension is called for. Here again the contractor is given the opportunity to meet and make their case.
- Additionally, by the date of proposed removal (or within 5 business days if the removal is immediate), the contractor must provide CSG with:
 - A list of all work in progress under the program where there is a signed project agreement between the contractor and a PARTICIPANT dated on or before the notice date; in other words, the program is underway and being implemented for one or more PARTICIPANTS;
 - Any extenuating circumstances which should be considered
 - Any request that a conference be scheduled to present information and explanations on the proposed removal

One of the two following strategies would be selected based on the gravity of the situation.

A. Conference Meeting:

In this case, the contractor would be invited to meet with CSG to explain their side of the circumstances, but would be allowed to continue to work in the program in the meantime.

To request a conference with CSG, the contractor must contact CSG Program Manager listed in the contract, providing an explanation of the actions in question.

If CSG does not receive a request from the contractor for a conference within fifteen (15) days from the date the removal letter is mailed, the contractor will be removed from the program as of the date of proposed removal.

If CSG receives a request for a conference by the date of proposed removal, CSG will schedule a conference with the contractor.

At the conference a CSG decision maker (Program Manager or Program Director) or his/her representative will meet with the contractor. Information and material providing the basis for the removal will be presented to the contractor. The contractor will be given the opportunity to present information and explanations relevant to the removal. At the conference, a reasonable time, not less than five (5) days, may be set within which additional written material may be submitted by the contractor and, in exceptional circumstances, additional sessions may be scheduled to allow further oral presentations. Based on consideration of the presentations at the conference and any timely-submitted additional written material, the CSG decision maker or his/her representative will make a final decision. A copy of the final decision will be sent via certified mail to the contractor detailing the action to be taken, if any, and an effective date of removal, if applicable. By the date of removal, the contractor will be required to complete in a timely manner all outstanding work previously listed in progress or for which a signed contract existed on the notice date.

B. Emergency Removal

In this case CSG may remove a contractor from a program effective immediately upon making a determination that not to do so would pose a threat to life, health, or property or for fraud. CSG will notify any contractor so removed verbally with a follow-up certified mail of the date of removal (which may be that day), the grounds for the action, and the opportunity to request a conference. If CSG receives a request from the contractor for a conference within five (5) days from the mailing date of the notice of immediate removal, CSG will schedule a conference with the contractor. The contractor will be suspended from the program immediately upon the CSG determination of the need for emergency removal. After the conference, CSG will promptly either confirm the removal or reinstate the contractor to program participation.

6. Contractor Reinstatement

After any removal period has expired (as defined in the written notification to the contractor – see the early paragraphs in Section 5 above for a discussion of the “time period of removal”), a contractor may apply for reinstatement to the program. A contractor may not be reinstated until all of the following conditions have been met:

- The contractor must meet all requirements as stated in the program specifications.
- The contractor must provide evidence satisfactory to CSG that any problems that led to removal have been remedied.
- All outstanding work must have been completed in accordance with program requirements
- In some cases the contractor may be required to provide additional assurances of responsibility satisfactory to CSG (e.g., adequate assurances of timely payment to suppliers, satisfactory completion of additional training, etc.).



Please direct all correspondence to:

The RePower Program
1633 Bellevue Ave, Seattle, WA 98122
Fax: 206 682 0641 Phone: 1-877-741-4340



RePower Trade Ally Participation Agreement

Welcome! This is the Participation Agreement to become a Trade Ally of the RePower Program. This Participation Agreement, and by incorporation the referenced exhibits, sets forth the terms and conditions under which contractors shall participate in the Program. Conservation Services Group (CSG) will approve or reject this Participation Agreement, and only upon receipt of an Approval Notice will the Applicant become a Trade Ally in the Program. Applicants will need to provide proof of the following to be eligible for the RePower Trade Ally Network:

- Commercial office space located in Kitsap County (include address in the 'Application Information' section below)
- Completed RePower Trade Ally Participation Agreement
- Additionally insured certificates of automobile liability and commercial general liability with Conservation Services Group, City of Bainbridge Island, Kitsap County, and Washington State University listed as the certificate holders (see page four for complete details on insurance requirements)
- EPA lead safe training certificate and OSHA 10-hour construction safety certificate (see page three for complete details on training requirements)
- Submit all applications, certificates, and questions regarding the RePower Trade Ally Program to Forest Eckley (e-mail: foresteckley@csgrp.com phone: 206-715-1176 fax: 206-682-0641).

Applicant Information

Company Name				Employees
Business Entity Type				
Contractor's License #				Exp. Date
WA State Business License Number (UBI #)			Exp. Date	
Business Address	City	State	State	Zip
Mailing Address	City	State	State	Zip
Office Phone	Fax		Yrs Under Ownership	
Primary/Office Contact			Title	
Email	Office Phone		Cell	
Primary Field Contact			Title	
Email	Office Phone	Cell		

Services Provided

<input type="checkbox"/> Sprayed Foam Insulation	<input type="checkbox"/> Furnaces	<input type="checkbox"/> HomePrint Assessments
<input type="checkbox"/> Batt Insulation	<input type="checkbox"/> Boilers	<input type="checkbox"/> HomePrint Audits
<input type="checkbox"/> Blown Loose Fill Insulation	<input type="checkbox"/> Hydronic /Radiant Systems	<input type="checkbox"/> EPS Audits
<input type="checkbox"/> Air Sealing	<input type="checkbox"/> Tankless Water Heaters	<input type="checkbox"/> General Contracting
<input type="checkbox"/> PTCS Duct Sealing (existing home)	<input type="checkbox"/> Standard Water Heaters	<input type="checkbox"/> Roofing
<input type="checkbox"/> Air-Source Heat Pumps	<input type="checkbox"/> Heat Pump Water Heaters	<input type="checkbox"/> Water Damage
<input type="checkbox"/> Ductless Heat Pumps	<input type="checkbox"/> Solar Water Heaters	<input type="checkbox"/> Ground Water Mitigation
<input type="checkbox"/> Geothermal Heat Pumps	<input type="checkbox"/> Residential Solar PV	<input type="checkbox"/> Crawl Space Vapor Barriers

Summary

Through the U.S. Department of Energy's (DOE) Energy Efficiency and Conservation Block Grant (EECBG) program and the DOE State Energy Program, City of Bainbridge Island, Kitsap County, Washington State University (WSU), and CSG have been awarded funding to implement energy efficiency programs within Kitsap County. To simplify participation and to make the best use of the grant funds, the grant recipients are working together under the name RePower. RePower

will operate similar energy efficiency campaigns in Bremerton, Bainbridge Island, and the greater Kitsap County area. The overarching goal of this program is improve the energy efficiency of 2,000 homes by 15% or more by July 1, 2013. To achieve this goal Repower staff will offer free home energy assessments, contractor referrals, contractor training, homeowner education, local marketing, and rebates for specific home improvements. Residential energy efficiency upgrades will be completed by a group of local, qualified contractors known as Trade Allies.

Trade Ally Benefits

Under this Agreement, contractors who participate in the RePower Program (hereafter "Trade Allies") contract with property owners to provide building performance services and agree to meet the RePower Program requirements and standards in doing so. Trade Ally benefits include:

- 1. Referrals to Customers:** Over the course of the RePower Program, we anticipate approximately five thousand home energy assessments will be completed in Kitsap County with the intent of identifying potential energy saving home improvements and providing referrals to local qualified contractors. Only Trade Allies will be referred during home energy assessments provided by the RePower Program. Referrals will be made to Trade Allies based on qualifications and performance: the program will make every effort to ensure that all Trade Allies receive referrals, but preference in the award of referrals will be given to Trade Allies that meet higher standards of technical and workforce accreditation and certification and to Trade Allies that demonstrate superior performance in the areas of work quality and customer service.
- 2. Promotion on the RePower Website:** Trade Allies will be listed on the RePower website as a preferred contractor of the RePower Program so that local homeowners know that a Trade Ally is a contractor who has the appropriate training to provide energy saving home improvements and assist them with applicable rebates, loans, and tax credits.
- 3. Discounts on Technical Trainings:** In cooperation with local RePower Program partners, RePower will offer technical trainings for Trade Allies. For a limited time, Trade Allies will be offered trainings at a reduced rate for their participation in the RePower Program. Course details will be available on the RePower website.
- 4. Discounts on Diagnostic Equipment:** Trade Allies will receive discounts on diagnostic equipment such as duct blaster and blower door systems and accessories purchased from the Energy Conservatory and Retrotec.

Trade Ally Requirements

By executing this Participation Agreement, the Trade Ally agrees to play an active role in the RePower Program by providing high quality building performance services to homeowners participating in the RePower Program. As a condition of participating in the RePower Program and accessing RePower Program benefits, the Trade Ally agrees that:

- 1. Trade Ally Shall Properly Respond to Program Referrals:** Trade Ally shall accept referrals from the RePower Program and shall provide services to these referrals in accordance with the RePower Program guidelines and this agreement. Trade Ally recognizes that referrals received from the RePower Program constitute a RePower Program benefit and that the Trade Ally shall make every effort to pursue these referrals in a timely fashion. If the Trade Ally fails to properly respond to a referral within one calendar week, the referral may be offered to another Trade Ally.
- 2. Trade Ally Shall Be Active in the Program:** Trade Ally agrees to submit a minimum of three energy efficiency upgrades per quarter through the Grant Reporting Template. Trade Ally further agrees to be a customer resource for local rebate and financing options relating to their trade, and attend regular Program status meetings to be scheduled not more frequently than once every 90 days. The time, date and location of these meetings will be announced no later than 30 days prior to each meeting.
- 3. Trade Ally Shall Assist with U.S. Department of Energy Data Collection and Reporting Requirements:** Trade Ally agrees to report required data, including information on each job completed and each new employee hired during the RePower Program in the **RePower Grant Reporting Template** provided in **Exhibit A**. Such reports are used to measure the effectiveness of the RePower Program by the grantor and shall be due once monthly, not later than the 10th of each

month for all jobs completed and employees hired in the previous calendar month. Failure to file required reports may subject Trade Ally to corrective action including, but not limited to, suspension or termination from eligibility to participate in the RePower Program.

- 4. Office Location and Hiring Requirements:** Trade Ally shall have a physical commercial office located in Kitsap County. Mailing addresses and PO Boxes do not constitute as a commercial office. Trade Ally shall ensure that a minimum of 50% of its new hires for the RePower Program be residents of Kitsap County during the RePower Program (February 1, 2011 – July 1, 2013).¹

- 5. Name and Logo Use:** Trade Ally agrees to allow their company's name to appear on the Trade Ally list on the RePower Program website and on other RePower Program marketing materials that may be developed for the RePower Program. The use of the RePower Program, CSG's or any other RePower Program partner's name or logo by Trade Ally shall be approved and authorized in writing, prior to use, by CSG.

- 6. Training and Certifications:** Trade Ally agrees to meet all safety and technical training requirements of the RePower Program. All contractors performing work under the RePower Program shall be EPA Lead-Safe Certified and shall have successfully completed the OSHA 10-hour construction safety training. The RePower Program will use the national technical standards established by the Building Performance Institute (BPI) as a benchmark for the trade ally network. The following technical certifications are required based on the trade ally's chosen field of work:

- **Building Analyst Workforce:** Trade Allies offering home energy audits as a service are required to have a BPI certified Building Analyst directing each audit, and shall attend a two-day training available through Washington State University Extension Program on the Energy Performance Score audit tool being used for the RePower Program. Building Analyst shall also provide one additional service (i.e., air sealing) to be eligible as a Trade Ally for the RePower Trade Ally Program.
- **Weatherization Professional Workforce:** Trade Allies offering weatherization services (i.e., insulation) are required to have a BPI Certified Envelope Professional or a comparable certificate holder performing or directing each job. Trade Allies offering weatherization services have until December 31, 2011 to meet this trade specific training requirement.
- **Heating Professional Workforce:** Trade Allies offering heating system services (i.e., space and water heating upgrades) are required to have an electrical contractor's license at the time of application and a BPI Certified Heating Professional or a comparable certificate holder performing or directing each job by December 31, 2011.

For all Trade Allies, evidence of required trainings shall be provided to the RePower Program in the form of certificates during the application process. Trade Allies lacking the trade specific training requirements of the RePower Program may subcontract with or hire an accredited contractor who meets the training requirements of the program. Trade Allies shall maintain all certifications claimed, and shall notify the RePower Program if any relevant certification changes. Training requirements for Trade Allies may be added or changed at anytime during the life of the Program.

- 7. Warranty of Labor and Materials:** Trade Ally shall provide the customer with a written warranty on labor, equipment, and materials for a minimum of one year from the date the service is performed. Equipment (or 'materials') installed shall carry manufacturer's warranty, including optional extended warranty coverage

- 8. Quality Control:** Trade Ally is subject to quality control (QC) inspections by CSG for work relating to the RePower Program. If the quality of work is deemed to be insufficient during a QC inspection, Trade Ally shall be required to make improvements suggested by CSG within 10 business days of written notification. Please see full **RePower Quality Control Summary** provided in **Exhibit B** and the **RePower Problem Response Procedures** provided in **Exhibit C**.

¹ Before claiming that no workers are available for hire from Kitsap County, Trade Ally is required at a minimum to consult with a workforce development program. If qualified workers are not available, Trade Ally may claim an exemption by writing to RePower describing their efforts to meet the requirement, including contact with training programs and any relevant workforce groups.

9. **Combustion Safety:** For jobs where air sealing or duct sealing is requested, Trade Ally is required to conduct combustion safety testing prior to and following the work. In cases where the pre-test indicates existing or possible problems, work shall not proceed without a remediation plan in place; costs of which shall be disclosed to the customer. In the case of a failed test following air sealing or duct sealing work, remediation is required at no additional cost to customer.

10. **Law Compliance:** Trade Ally shall maintain any relevant licenses required by federal, state, county, or municipal governments or any other agencies for work in the trades undertaken in the Repower Program. Trade Ally shall abide by all local, state, and federal guidelines, applicable laws, building codes, and regulations and perform work in accordance with the Repower Program’s materials and installation standards.

11. **Insurance Requirements:** Trade Ally shall procure and maintain, at its expense, the following insurance coverage that shall continue in effect for all claims arising during the term of this Participation Agreement:

- a. Worker’s Compensation as required by applicable statutory code for all applicable federal and state laws.
 - b. Employers Liability Insurance at a minimum of \$1,000,000 per accident for bodily injury and \$1,000,000 per employee/aggregate for disease. Trade Ally and its underwriter shall waive all rights of subrogation against CSG, City of Bainbridge Island, Kitsap County, and WSU. CSG, City of Bainbridge Island, Kitsap County, and WSU shall be named as additional insured.
 - c. Comprehensive General Liability Insurance with a minimum combined single limit per occurrence and in the aggregate of \$1,000,000. Such insurance shall be primary as respects CSG over any other insurance available to CSG. Trade Ally and its underwriter shall name CSG, City of Bainbridge Island, Kitsap County, and WSU as additional insured and waive all rights of subrogation against CSG, City of Bainbridge Island, Kitsap County, and WSU.
 - d. Automobile liability insurance covering all owned, hired and non-owned vehicles and equipment, in amounts satisfactory to CSG, minimum combined single limit per occurrence and in the aggregate of \$1,000,000.
- Participating Contractor shall furnish CSG with certificate or policies, satisfactory to CSG, evidencing that above insurance is in force. No such policy shall be cancelable or subject to material change except after thirty (30) days prior written notice to CSG. Any certificate furnished to CSG shall recite such provisions. When CSG, City of Bainbridge Island, Kitsap County, and WSU are listed as additionally insured, the certificate holders shall be listed as follows:

Conservation Services Group	City of Bainbridge Island	Kitsap County	Washington State University
40 Washington St	280 Madison Ave N	614 Division St. MS-4	905 Plum Street SE, PO Box 43165
Westborough, MA, 01581	Bainbridge Island, WA 98110	Port Orchard, WA 98336	Olympia, WA 98504-3165

12. **Indemnification and Hold Harmless:** Trade Ally and Trade Ally’s subcontractors agree to indemnify, reimburse, defend and hold harmless CSG, City of Bainbridge Island, Kitsap County, and WSU their affiliates, and the respective officers, officials, directors, and employees of each, from and against any and all claims, risks, loss, expense, damages, demands, costs, suits, judgments, and attorney’s fees of any kind, whether tangible or intangible, arising from, in connection with, or in any way relating to any of the following:

- a. Acts or omissions of Trade Ally, its employees, agents, or subcontractors in the performance or nonperformance of services as part of the Repower Program including, but not limited to, those that cause bodily injury or death or physical damage to tangible property;
- b. Trade Ally’s breach of its obligations regarding Confidential Information;
- c. Any theft or other misappropriation of CSG’s information, property or funds by Trade Ally; and
- d. Any non-compliance with federal, state, or local laws.

Trade Ally hereby assumes all risk of damage to its property, or injury to its officers, directors, agents, employees, or invitees, related to performance of work as part of the Repower Program and from any cause, and hereby waives all claims against CSG, City of Bainbridge Island, Kitsap County, and WSU.

13. **Limited Liability:** CSG’s liability in connection with the Repower Program and Trade Ally shall be limited to the payment of monetary incentives. Under no circumstances shall CSG be liable to Trade Ally for any further amounts under any legal

theory including any special, consequential, incidental, or indirect damages in connection with their work for the RePower Program or otherwise.

14. Contractor Performance: Trade Ally shall hire employees who are fully capable and qualified to perform the services offered by their company. Trade Ally shall be fully responsible for the performance of their employees, subcontractors, and/or any other person or entity performing services for the Trade Ally. Trade Ally shall not delegate or subcontract performance of any services to any other person or entity without prior written consent of CSG. Trade Ally shall ensure that all its subcontractors that have been approved by CSG are adequately licensed, bonded, and insured and comply with all program requirements. Trade Ally shall not employ as a subcontractor any firm that has been suspended or terminated from the RePower Program without CSG's written permission.

15. Independent Contractor: Trade Ally shall properly represent the relationship of the Trade Ally to CSG as an independent contractor participating in the RePower Program; that listing on RePower Program materials and website does not constitute an endorsement of the Trade Ally by CSG; and that the Trade Ally is not an employee, agent, partner, or representative of, or under contract to, the RePower Program or CSG. Trade Ally shall NOT represent its business as working for, approved by, or certified by U.S. Department of Energy, CSG, City of Bainbridge Island, Kitsap County, or WSU. Trade Ally has no power or right to bind CSG or RePower Program or act on its behalf when dealing with customers or third parties.

16. Contractor Removal: This Participation Agreement is completely voluntary and can be terminated at any time for any reason without penalty by either CSG or Trade Ally. Trade Ally shall notify CSG in writing of its decision to end participation. CSG will use the guidelines provided in the **RePower Problem Response Procedures in Exhibit C** for the removal of any Trade Ally.

17. Incorporation by Reference: In addition to the terms and conditions of this **RePower Trade Ally Participation Agreement**, all installation specifications set forth in the **RePower Weatherization Specifications Manual**, reporting requirements outlined in **Exhibit A - RePower Grant Reporting Template** and all requirements of **Exhibit B - RePower Quality Control Procedures** and **Exhibit C - RePower Problem Response Procedures** are hereby agreed to and incorporated by reference.

The provisions in this Participation Agreement are effective as of the date of approval by CSG. Trade Ally will be subject to all program-specific terms and conditions for participation. Approval will begin on the date of the Program's approval and will expire on August 1, 2013, unless terminated beforehand in accordance with this agreement.

By signing this Participation Agreement, I represent that (i) I am duly authorized to submit this Participation Agreement on behalf of the company identified in this Participation Agreement; (ii) I certify, under the penalties of law that the statements made on this Participation Agreement have been examined by me and are true, accurate, and complete; (iii) I have read this Participation Agreement, including all supporting policies described or referenced therein, in its entirety; (iv) I understand and accept the terms and conditions and all requirements contained in this Participation Agreement, including flow down requirements to all subcontractors, and all supporting policies described or referenced therein; (v) I understand that by signing this Participation Agreement, I consent to any other inquiry to verify or confirm the information I have given; and (vi) I further understand and accept that approval or rejection of this Participation Agreement is in the sole discretion of CSG and that only upon receipt of any Approval Notice will the contractor be a Trade Ally in the Program.

Applicant

Conservation Services Group

REPOWER TRADE ALLY PARTICIPATION AGREEMENT (6 OF 6)

Signature of Authorized Representative

Signature of Authorized Representative

Print Name & Title

Print Name & Title

Date

Date

Please direct all correspondence to:



40 Winslow Way, Suite 160, Bainbridge Island WA 98110
Fax: 206 682 0641 Phone: 1-877-741-4340

HOME ENERGY CHECK UP FORM



1.877.741.4340 RepowerBainbridge.org

EXISTING CONDITIONS AND RECOMMENDATIONS

HOME INFORMATION

Year Built _____ Bedrooms _____
 Square Footage _____ Occupants _____

SEASONAL LOAD:

WEATHERIZATION

Insulation Existing _____ Recommendation _____
(Inch or R-value)

Attic/Ceiling Existing Insulate to R-49
 Wall Existing Insulate to R-19
 Floor Existing Insulate to R-30
 Ducts Existing Insulate to R-11

Air Leakage

Recommendation _____

Duct Sealing

Testing & sealing _____

Air Sealing

Testing & sealing _____
(Testing recommended)

WINDOWS

Type

Existing _____ Recommendation _____

Single pane _____
 Double pane-aluminum sill _____
 Double pane-vinyl _____
 Other: _____

SPACE HEATING

Existing

Nat. Gas Electric Propane Other

Fuel Type

System Type

Forced Air Heat Pump Hydraulic Baseboard Other

Make / Model

_____ Age _____

Secondary Heat

Recommended New System

New boiler (.82 AFUE or higher)
 New heat pump (8.5 HSPF or higher)
 New ductless heat pump (8.5 HSPF or higher)
 New furnace (0.95 AFUE or higher)

PRIORITIZED RECOMMENDATIONS

Acknowledgments (see reverse)

Customer Signature _____

Date _____

Energy Advisor _____

BASE LOAD:

WATER HEATING

Old New Replace
 Age _____ Fuel Type _____ Nat. Gas Electric Propane Other

Make _____ System Type _____ Storage Tankless Heat Other
 pump

Recommended System:

New Energy Star® water heater (.94EF)
 Consider solar hot water system
 Consider Energy Star® heat pump water heater

APPLIANCES

Recycle your secondary refrigerator or freezer
 Replace clothes washer with an Energy Star® model
 Seasonally turn off/lower temperature of hot tub
 Add timer for hot water circulating pump

LOW-COST MEASURES

Replace all incandescent bulbs with CFLs

23W Twist	14W A Lamp	9W Globe	14W Twist	14W R-30	Other	Total CFLs

Install high performance shower heads

Standard	Handheld	Other	Total

PRE-QUALIFIES FOR WHOLE HOUSE ENERGY UPGRADE?

Yes No

RECOMMEND SOLAR ASSESSMENT? (Solar potential)

Yes No

RECOMMEND ENERGY ASSESSMENT WITH EPS

Yes No

RePower Home Energy Check Up Acknowledgements and Conditions

Program Background

Conservation Services Group (CSG) and the City of Bainbridge Island have partnered to deliver a community-wide energy efficiency program called RePower Bainbridge. RePower Bainbridge is funded through a competitive grant administered by the Department of Energy under the American Recovery and Reinvestment Act. The purpose of the funding is to stimulate the local economy, create local jobs, and empower residents to address their energy efficiency and clean energy priorities. With your help, we will reduce total power consumption on Bainbridge Island by 15% and peak energy demand by 6 MW.

Energy Assessments

RePower Bainbridge employees and local contractors are providing energy assessments to assist homeowners in prioritizing the energy efficiency opportunities in their homes.

Data Release

As transparency and accountability are central aims of the use of this funding, RePower Bainbridge must submit quarterly progress reports to the Department of Energy. Energy saved and jobs created are the key measurements for a return on the investment of the grant. To accurately track the progress of the program, we are reporting the results of home energy assessments and energy efficient upgrades. Specifically, the data will be used to quantify the energy savings potential and achievement to the Department of Energy and will provide the opportunity for an independent, third-party evaluator to confirm energy savings once the RePower program has ended. As RePower Bainbridge is a three-year program, and the final analysis will occur after the program is completed, this release of data is valid for up to four years after date of signing.

By signing this form, you authorize: the energy advisor to proceed with the energy assessment; your energy assessment and energy efficient upgrade information to be shared with CSG and the U.S. Department of Energy; and utility rebate information and consumption data to be shared with CSG and the Department of Energy for up to four years after the date of signing. CSG shall keep customer information in confidence and shall use confidential information only for the purposes of the discussions between the Parties of the RePower Bainbridge Program. In the performance of any subsequent contractual obligations to the customer, CSG shall limit dissemination of confidential customer information to only those of each Party who have a need to participate in the discussions or perform any contractual obligations arising from such discussions.



RePower Energy Efficiency Loan and Whole House Energy Upgrade
Incentive Payment Agreement

This Repower Energy Efficiency Loan and Whole House Energy Upgrade Incentive Payment Agreement (the "Agreement") is made as of this _____ day of _____, 2012 by and among _____ with its principal offices located at _____, in its capacity as program administrator of the RePower programs in Bainbridge, Brenton and Kitsap County, and _____ (the "Lender"), a Washington not-for-profit credit union with its principal offices located at _____.

WHEREAS, _____ is the program administrator for the residential energy efficiency program known as _____);

WHEREAS, as part of the _____ Program, the Lender offers energy efficiency loans to participants in the _____ Program;

WHEREAS, certain participants in the _____ Program may be eligible to receive a Whole House Energy Upgrade Incentive (the "Incentive") to assist with the installation of energy efficiency measures;

WHEREAS, the Lender agrees to make such an Incentive payment to certain contractors authorized by _____ pursuant to the terms and conditions set forth herein; and

WHEREAS, _____ agrees to reimburse the Lender for the Incentives paid to the authorized contractors pursuant to the terms and conditions set forth herein.

NOW THEREFORE, in consideration of the foregoing premises, and other good and valuable consideration, the receipt, sufficiency and adequacy of which are hereby acknowledged, each of _____ and the Lender agrees as follows:

1. *Disbursement of Loan and Incentive.* Pursuant to this Agreement, the Lender shall make payment of the Incentive to contractors authorized by _____. Prior to any payment of an Incentive by the Lender, _____ shall notify the Lender in writing of:
 - a. Project ID #;
 - b. Customer Name;
 - c. Customer Address;
 - d. Loan amount;
 - e. Incentive amount;
 - f. Total amount to be paid to the contractor; and
 - g. Contractor's name and address.

Within five (5) business days of this notification by _____, the Lender will issue a check to the contractor for the total amount to be paid to the contractor. Upon

- issuing the check to the contractor, the Lender shall provide _____ with written notice of its distribution of the loan and incentive payment to the contractor (“Lender Distribution Notice”).
2. Reimbursement of Incentive Amount. Within fourteen (14) days of receipt of a Lender Distribution Notice, _____ shall provide the Lender with a check in the amount of the Incentive provided to such contractor.
 3. Term/Early Termination. The term of this Agreement shall commence effective November 26, 2012 and shall terminate on September 30, 2013; provided, however, _____ or Lender may at any time upon the provision of sixty (60) days’ notice terminate this Agreement.
 4. Limitation of Liability. Either party hereto shall be liable to the other party for any consequential, incidental, indirect, punitive, or special damages or any fees, fines or penalties arising out of or relating to this Agreement.
 5. Governing Law/Venue. This Agreement shall be interpreted, enforced and governed under the laws of the State of _____, excluding its principles of conflicts of law. Each of _____ and the Lender acknowledges and agrees that the state and federal courts located in _____ shall be the exclusive forums for the resolution of any disputes concerning this Agreement.
 6. Validity of Provisions. Should any provision of this Agreement be declared or be determined by any court to be illegal or invalid, the validity of the remaining parts, terms or provisions shall not be affected thereby and said illegal or invalid part, term, or provision shall be deemed not to be a part of this Agreement.
 7. Entire Agreement. This Agreement sets forth the entire agreement between the parties hereto with regard to the payment of the Incentive and fully supersedes any and all prior agreements or understandings between the parties hereto with regard to the payment of the Incentive. Any modification or amendment to this Agreement must be in writing and must be signed and dated by all of the parties, and must explicitly state that it is intended to be an amendment to or modification of this Agreement.
 8. Breach/Waiver. If any Party to this Agreement waives a breach of one of the provisions of this Agreement by any other Party, that waiver shall neither operate nor be construed as a waiver of any subsequent similar breach of any provision hereof.
 9. Notices. All notices or demands under this Agreement shall be sufficient if made in writing and mailed to the parties hereunder at their respective addresses set forth herein.

Notices to _____ may be sent to:

REPOWER ENERGY EFFICIENCY LOAN-INCENTIVE AGREEMENT (4 OF 4)

IN WITNESS WHEREOF, each of the parties hereto has caused this Agreement to be executed on its behalf under seal by a duly authorized officer as of the date first above written.

(LENDER NAME HERE)

By: _____
Name: _____
Title: _____

(ORGANIZATION NAME IMPLEMENTING PROGRAM HERE)

By: _____
Name: _____
Title: _____



Quality Control & Assurance – Inspection Form

Participant Information

Property Name:	Number of Buildings:	Number of Units:
Participant Name:	City:	State: WA Zip:
Site Address:	Phone:	<input type="checkbox"/> Renter <input type="checkbox"/> Property Owner
Email:	Onsite Contact (if different):	

Overall Inspection Result

Type of Inspection:	<input type="checkbox"/> Quality Assurance	<input type="checkbox"/> Quality Control
Inspector Name:	Date:	
<input type="checkbox"/> Pass		
<input type="checkbox"/> Needs Minor Corrective Action		
<input type="checkbox"/> Needs Major Corrective Action		

Attic

<input type="checkbox"/> Pass	<input type="checkbox"/> Fail	<input type="checkbox"/> N/A	Contractor:	Date Installed:
Insulation Type:			R Value:	Insulation Depth:
<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	Ridge	<input type="checkbox"/> Yes
<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	Eave Vents	<input type="checkbox"/> No
<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	Heat Producing Fixtures	<input type="checkbox"/> Yes
<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	Venting to exterior	<input type="checkbox"/> No
<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	Insulation Covered	<input type="checkbox"/> Yes
<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	Insulation certificate & ruler installed	<input type="checkbox"/> No
<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	Weather Stripping	<input type="checkbox"/> Yes
<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	Dam	<input type="checkbox"/> Yes
<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A		<input type="checkbox"/> No
COMMENTS:				

Walls

<input type="checkbox"/> Pass	<input type="checkbox"/> Fail	<input type="checkbox"/> N/A	Contractor:	Date Installed:
Insulation Type:			R Value:	All Cavities Filled:
<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	Plugged	<input type="checkbox"/> Yes
<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	Sealed	<input type="checkbox"/> No
<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	Stud Depth:	
COMMENTS:				



Quality Control & Assurance – Inspection Form

Floor
 Pass Fail N/A Contractor: _____ Date Installed: _____
 Insulation Type: _____ R Value: _____ Joist Depth: _____

Foundation Vents
 Yes No N/A All Cavities Filled: Yes No Vent Baffles: Yes No

Ground Cover
 Yes No N/A 6mm Black Poly: Yes No Continuous Yes No

Supports
 Yes No N/A Floor Joist Spacing: _____ Fasteners Yes No

Water Pipe Insulation
 Yes No N/A Coverage Yes No Supports Yes No

Human Contact Areas
 Yes No N/A Insulation covered Yes No Floor Penetrations Yes No

Exhaust Fans
 Yes No N/A

Water in zone
 Yes No N/A Sump pump covered & sealed Yes No N/A

COMMENTS: _____

Air Sealing
 Pass Fail N/A Contractor: _____ Date Installed: _____

	House Pressure	Fan Pressure	Ring	Flow
Trade Ally Pre	Pa	Pa	<input type="checkbox"/> 0 <input type="checkbox"/> A <input type="checkbox"/> B <input type="checkbox"/> C	CFM ₅₀
Trade Ally Post	Pa	Pa	<input type="checkbox"/> 0 <input type="checkbox"/> A <input type="checkbox"/> B <input type="checkbox"/> C	CFM ₅₀
Quality Check Pre	Pa	Pa	<input type="checkbox"/> 0 <input type="checkbox"/> A <input type="checkbox"/> B <input type="checkbox"/> C	CFM ₅₀
Quality Check Post	Pa	Pa	<input type="checkbox"/> 0 <input type="checkbox"/> A <input type="checkbox"/> B <input type="checkbox"/> C	CFM ₅₀
Blower Door: Acceptable CFM		ACH50	Mechanic Ventilation <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	CAZ Pass <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A
MVL / BAS			CO Alarm <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	

COMMENTS: _____

Duct Sealing
 Pass Fail N/A Contractor: _____ Date Installed: _____

Type of Test: Leakage to Outside Total Leakage

	House Pressure	Fan Pressure	Ring	Flow
Trade Ally Pre	Pa	Pa	<input type="checkbox"/> 0 <input type="checkbox"/> A <input type="checkbox"/> B <input type="checkbox"/> C	CFM ₅₀
Trade Ally Post	Pa	Pa	<input type="checkbox"/> 0 <input type="checkbox"/> A <input type="checkbox"/> B <input type="checkbox"/> C	CFM ₅₀
Quality Check Post	Pa	Pa	<input type="checkbox"/> 0 <input type="checkbox"/> A <input type="checkbox"/> B <input type="checkbox"/> C	CFM ₅₀
Ducts: Acceptable CFM		Tap Location	Duct Blaster Location	ACH50
Air Handler Effect		MVL/BAS:	CO Alarm <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	Duct Insulation <input type="checkbox"/> Pass <input type="checkbox"/> Fail

COMMENTS: _____

Quality Control & Assurance – Inspection Form



Furnace/Heat Pump/Boiler

<input type="checkbox"/> Pass <input type="checkbox"/> Fail <input type="checkbox"/> N/A		Contractor:		Date Installed:	
System Type:					
Model Number Correct:		Serial Number	<input type="checkbox"/> Yes <input type="checkbox"/> No	Efficiency Factor	<input type="checkbox"/> Yes <input type="checkbox"/> No
<input type="checkbox"/> Yes <input type="checkbox"/> No					Terminate Outside Shell <input type="checkbox"/> Yes <input type="checkbox"/> No
#: _____		Flue Pipe Joint Seal	<input type="checkbox"/> Yes <input type="checkbox"/> No	Properly Plumbed	<input type="checkbox"/> Yes <input type="checkbox"/> No
COMMENTS:					

Water Heater

<input type="checkbox"/> Pass <input type="checkbox"/> Fail <input type="checkbox"/> N/A		Contractor:		Date Installed:	
System Type: <input type="checkbox"/> Electric <input type="checkbox"/> Gas <input type="checkbox"/> Oil <input type="checkbox"/> Tank <input type="checkbox"/> Tankless <input type="checkbox"/> Heatpump <input type="checkbox"/> Boiler <input type="checkbox"/> Other:					
<input type="checkbox"/> Yes <input type="checkbox"/> No		Serial Number	<input type="checkbox"/> Yes <input type="checkbox"/> No	Efficiency Factor	<input type="checkbox"/> Yes <input type="checkbox"/> No
COMMENTS:					

Inspector Comments and/or Corrective Action Requirements:

1.	
2.	
3.	

Corrective Action Requirements:

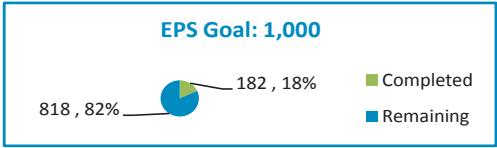
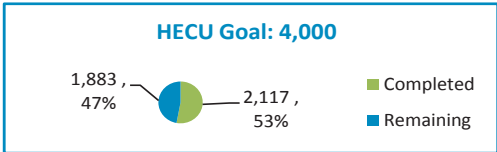
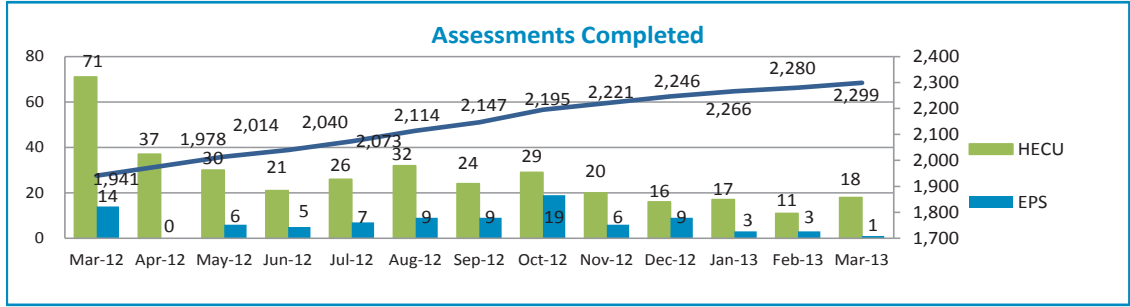
All corrective actions listed in the comments section above must be completed within 10 business days from the date of this inspection. It is the contractor's responsibility to schedule corrective actions with the homeowner listed on this form. Documentation of corrective action taken must be submitted to RePower within 10 days of work completed. Documentation shall consist of photographs showing the corrected condition, or a follow up on-site inspection by RePower Quality Assurance staff. Please notify Seth Kolodziejcki at (206) 866-0218 to schedule a follow up visit or mail proof of your corrective action documentation to 400 Winslow Way E, Ste 160, Bainbridge Island, WA 98110.

BAINBRIDGE ISLAND PROGRESS DASHBOARD

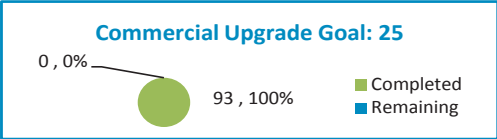
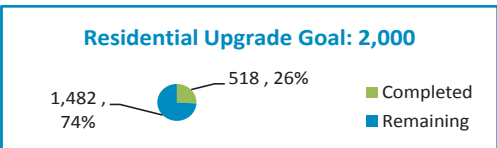
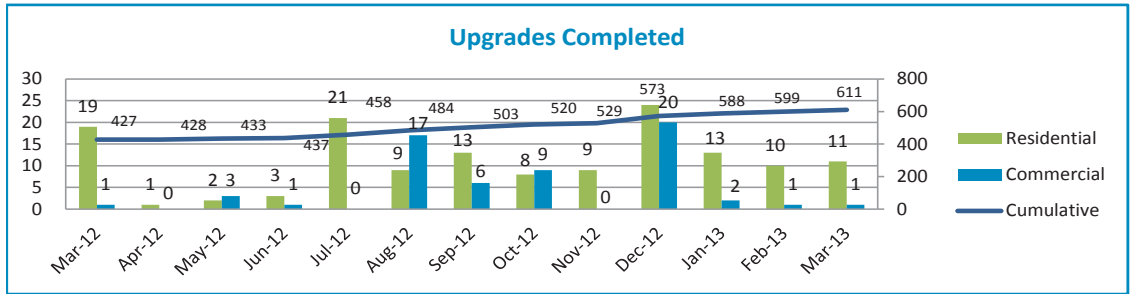


Progress Dashboard: March 2013

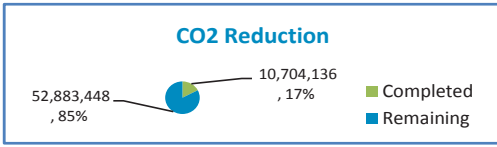
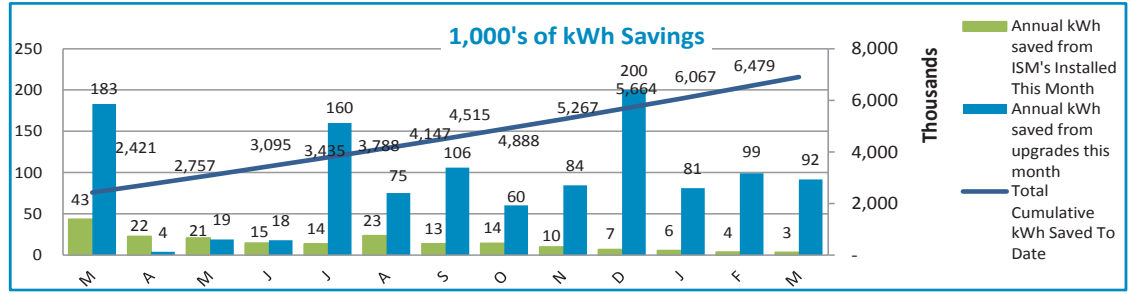
Residential Home Energy Assessments



Energy Upgrades



kWh & Carbon Savings



Category	Count
CFL Bulbs	26,676
Showerheads	792

*Annual kWh saved is based on deemed savings of 33 kWh/bulb and 136 kWh/showerhead

