

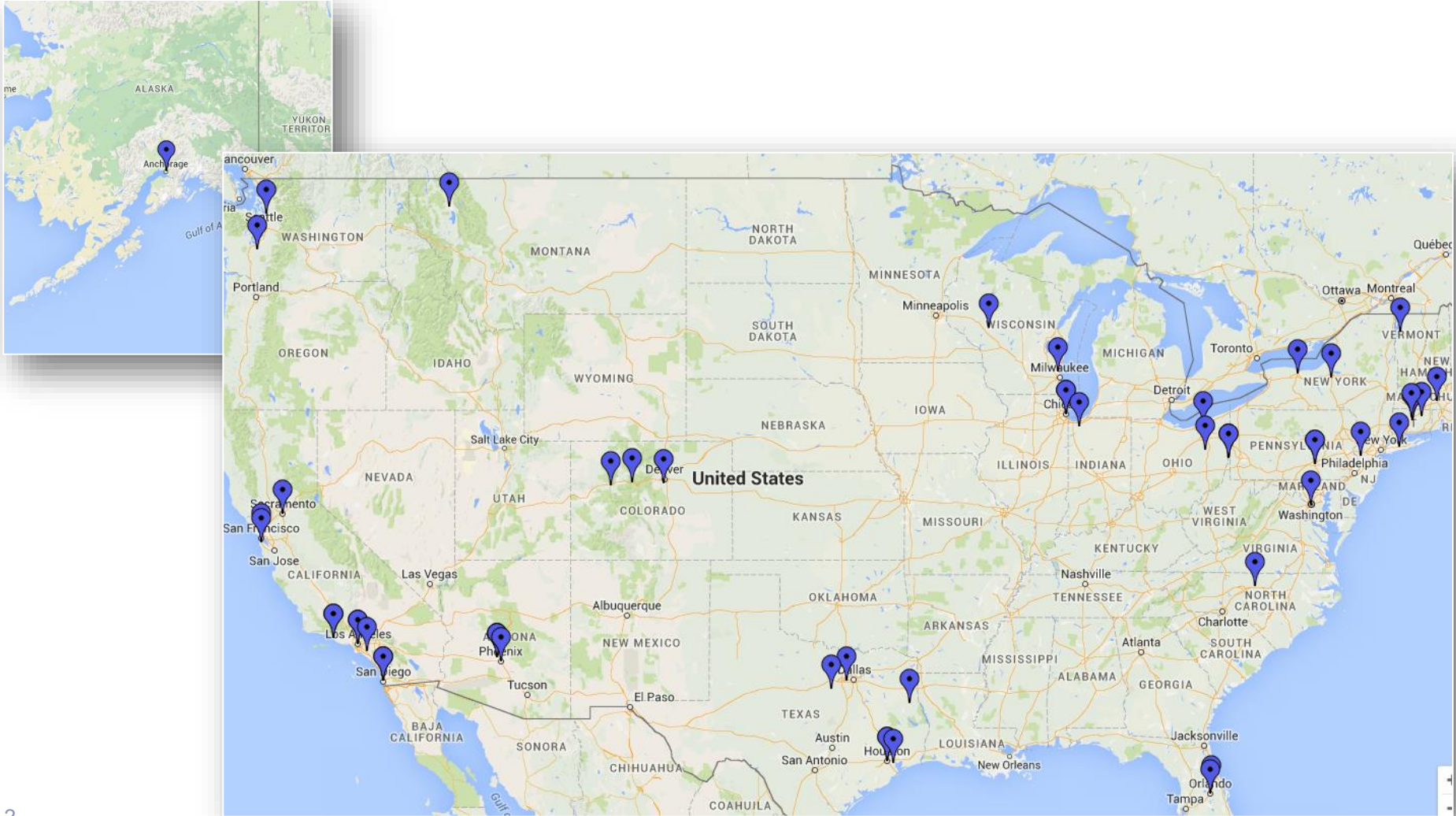


Better Buildings Residential Network Peer Exchange Call Series: *Training: How to Get Results – What Matters, What Doesn't (201)*

April 14, 2016

Call Slides and Discussion Summary

Call Attendee Locations



Call Participants – Network Members

- Alaska Housing Finance Corporation
- Center for Sustainable Energy
- CLEAResult
- Connecticut Green Bank
- Energy Efficiency Specialists
- Housing Authority of the City of San Buenaventura
- Midwest Energy Efficiency Alliance (MEEA)
- United Way of Long Island
- Vermont Energy Investment Corporation (VEIC)

Call Participants – Non-Members

- AAA Energy Audits
- AppleBlossom Energy
- City of Orlando
- Cleveland Public Power
- Conservation Connection Consulting
- DAP
- Energy Design Update
- Energy Smart Colorado
- Eversource
- Flathead Electric Cooperative
- Franklin Energy Services
- Fruitfull Energy
- Holy Cross Energy
- JOHNSON A/C
- National Grid (New York)
- NW Energy Coalition
- Okaloosa gas
- Ontario Ministry of Energy
- PA - PUC
- Parker Interests Unlimited
- SEEC LLC
- Snohomish PUD
- Solar Habitats, LLC.
- SPEER
- Tenderloin Neighborhood Development Corp.
- TRC Energy Services
- USGBC
- V3
- Ventura County Regional Energy Alliance

Agenda

- Agenda Review and Ground Rules
- Opening Polls
- Brief Residential Network Overview
- Residential Network Training Toolkit Overview
- Featured Speakers
 - **Dan Wildenhaus**, Building Science Manager, CLEAResult (**Network Member**)
 - **Jeffrey Granger**, New Mexico Energy \$mart Academy, Santa Fe Community College
- Discussion
 - What experience do you have with contractor training?
 - What training approaches are most effective for improving work quality?
 - What training is most useful for generating more energy upgrades?
- Closing Polls and Upcoming Call Schedule

Opening Poll #1

- Which of the following best describes your organization's experience with training for energy efficiency professionals?
 - Very experienced/familiar – **46%**
 - Some experience/familiarity – **29%**
 - Limited experience/familiarity – **20%**
 - Not applicable – **5%**
 - No experience/familiarity – **0%**

Opening Poll #2

- Which of the following best describes your organization?
 - Program administrator or implementer – **52%**
 - Contractor/trade ally – **15%**
 - Training provider – **15%**
 - Other (please specify) – **17%**

Better Buildings Residential Network

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

Membership: Open to organizations committed to accelerating the pace of home energy upgrades.

Benefits:

- Peer Exchange Calls 4x/month
- Tools, templates, & resources
- Recognition in media, materials
- Speaking opportunities
- Updates on latest trends
- Voluntary member initiatives
- Residential Program Solution Center guided tours

Commitment: Provide DOE with annual number of residential upgrades, and information about associated benefits.

For more information or to join, energy.gov/eere/better-buildings-residential-network/join

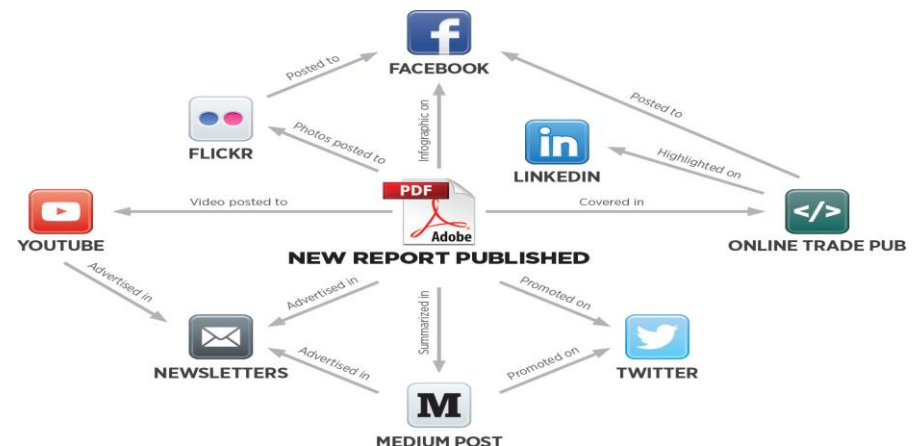
Toolkits – Voluntary Member Initiatives

Better Buildings Residential Network Members join together to identify and address common challenges and market opportunities.

Self-Assessment Template

- Training
- Social Media
- Designing Incentives
- Partnerships

Program Design	Characteristics	Exist Y/N	Rate If Y, rate on scale of 0-4
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Toolkit – Training

Table of Contents:

- Getting Started With Good Partners
- Types of Training
 - Technical Training
 - Outreach Training
 - Professional Training
- Additional Resources



Toolkit – Technical Training

Contractors:

- Strong building science knowledge necessary
- Need to be able to convey benefits to customers
- Stakeholder engagement informs planning
- Main point of contact



Toolkit – Outreach Training

Sales training for contractors:

- Comprehensive evaluation of more than 140 programs in \$500M grant
- Successful programs increased contractors' sales effectiveness
- A top success factor



Toolkit – Professional Training

Sustainable residential energy efficiency markets:

- Have successful contractors that stay in business
- Provide general business assistance and training
- Regular engagement btw programs & contractors

Next Step Living,
Out of Cash,
Shutting Doors
-- March 17, 2016



2013 HPwES
Contractor,
Housing
Innovation
Awards

Training Experience Poll

- What types of contractor training has your program offered or used?
 - Technical: building science, EE technologies and techniques – **41%**
 - Outreach: sales training & promotion of program offerings – **29%**
 - Professional: business development and management skills -**19%**
 - None or Not Applicable – **8%**
 - Other (please explain) – **0%**

Training Toolkit



The Better Buildings Residential Network Training Toolkit can be used by residential energy efficiency programs interested in realizing the value of providing training opportunities for contractors, staff, and volunteers. For example, according to a comprehensive evaluation of more than 140 energy efficiency programs across the country that participated in a \$500 million grant program, contractor training activities have achieved positive results, including more comprehensive upgrades, a higher assessment-to-upgrade conversion rate, improved program processes, improved quality control, and increased revenues, among other benefits.

This Training Toolkit is for program managers to identify training resources and opportunities to help staff, volunteers, and contractors enhance their understanding of building science; sales and marketing; residential energy efficiency program offerings; and business development. Better Buildings Residential Network members provided input and review for toolkit content.

Successful residential energy efficiency training approaches start with partner organizations that can help deliver training. Three types of training for contractors, staff, energy advisors, and volunteers follow below:

1. **Technical training:** building science, energy assessments, technologies, and techniques
2. **Outreach training:** promotion of program offerings, sales training, and customer engagement
3. **Professional training:** business development and management for participating contractors

Additional resources follow at the end of the toolkit, including more details on the Better Buildings Residential Program Solution Center, which is an online collection of resources and lessons learned concerning training and many other topics from years of hard-won experience by residential energy efficiency programs.

Getting Started With Good Partners

When it comes to training, there's no need to reinvent the wheel. Collaborate with organizations such as colleges, trade groups, and local job or skills development organizations to access and enhance existing training programs and resources. For example, community colleges can be great partners; they have been willing to add home performance studies to their curricula, and in return, can use your program for training with home energy upgrade projects in the field.

Trade organizations and job placement programs for underserved communities also make good training partners, and have access to funding that can subsidize technical training as a way to build the local workforce and economy. Following are just a few programs and examples that have found local partners to enhance training program success:

- ▶ Southeast Energy Efficiency Alliance programs partnered with veterans' groups and job training programs to reach and teach new sources of home performance contractors. Nexus Energy Center, the program implementer in Huntsville, Alabama, used a U.S. Department



Learn more at betterbuildings.energy.gov/bbrn



TABLE OF CONTENTS

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Presentation Highlights: Training Toolkit

- Use with contractors, staff, energy advisors, and volunteers:
 - Technical Training:
 - **Avoid jargon.** Explain building science simply to customers.
 - Outreach Training:
 - **Contractor sales training** increases business & program success.
 - Professional Training:
 - **Successful contractors** need business & building science skills.

**Lessons Learned:
Dan Wildenhaus
Building Science Manager
CLEAResult**

WHAT MAKES TRAINING WORK?

Dan Wildenhaus

Building Science Manager/Trainer

CLEAResult

Supporting Community Power Works for Home,
Energy Trust of Oregon Existing Homes, NEEA
Efficient Homes Initiative, and others

CLEAResult[®]

How do we know what we are looking for?

Standard program designs depend on standard metrics for measuring success.

How do we measure the impact of quality, well trained contractors and auditors?

Does counting qualified projects really tell us if we have successful training?

The Ripple Effect



Whose goals does the training serve?



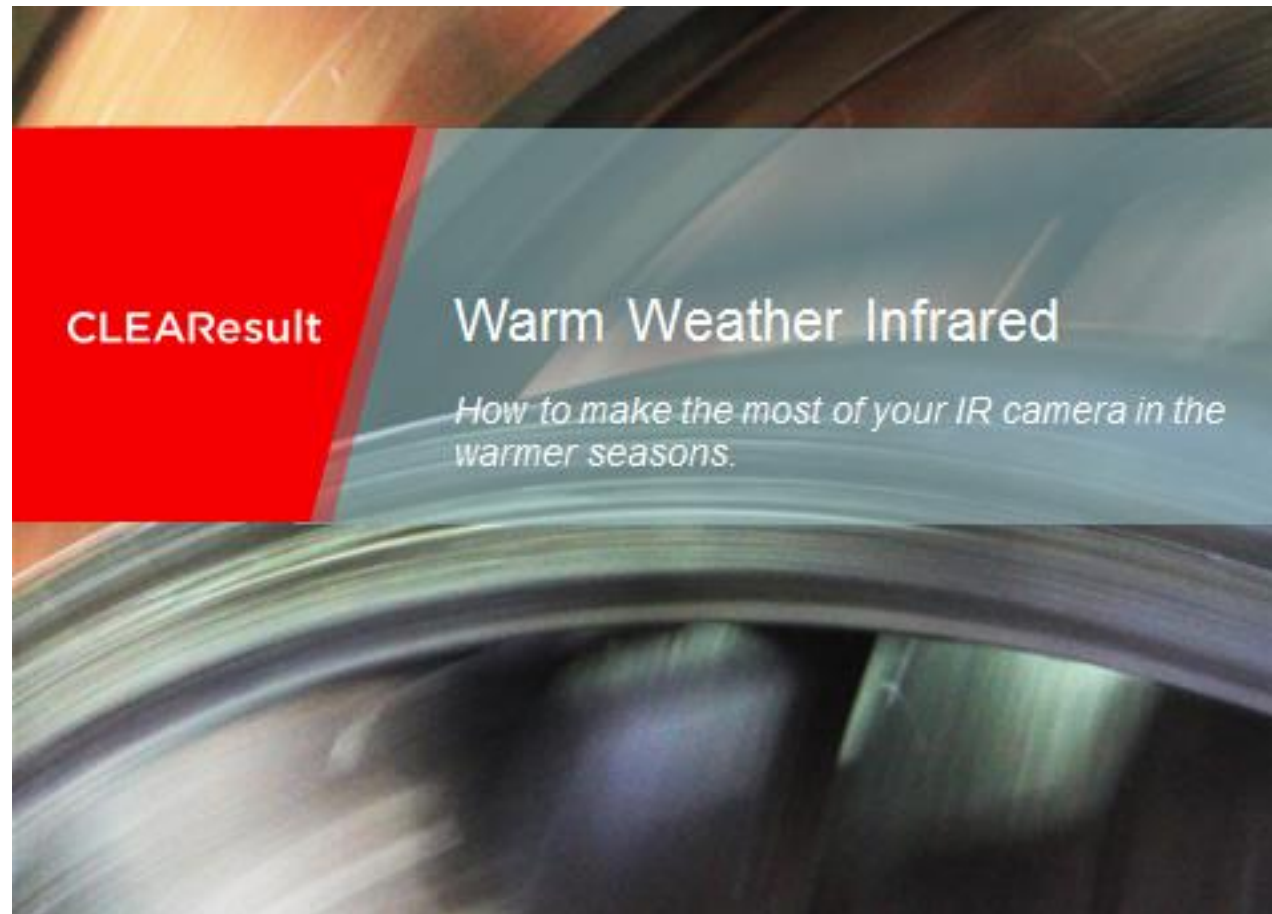
Idea Number One

Ask if the training goal is aligned with a program goal.

Program goals are often required to be quantifiable (gaining certifications, lead directly to improved QA, increase conversion rates).

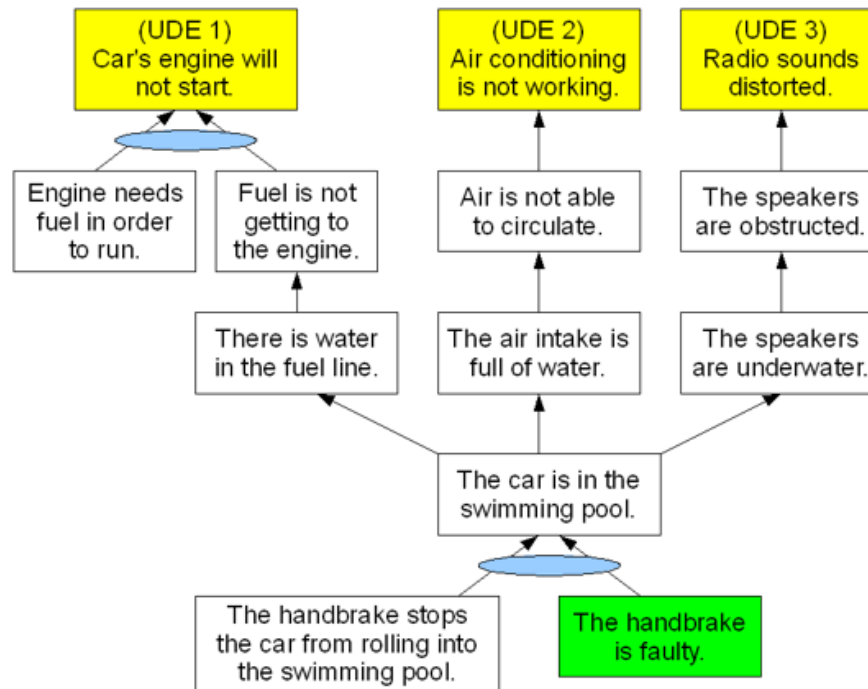
Does a general training on duct sealing lead to specific quantifiable goals?

How about



Root Analysis of core problems

Ask “why” questions three to five times for at least one of our stories



Idea Number Two

Props rule!

In person is likely best, but not always feasible.

Activities help concepts to sink in.

Repetition, repetition, repetition.



Hands on, even when not in the same room.

MEASURE CATEGORY: MECHANICAL SYSTEMS

Keys to Setting Ventilation Controls Correctly

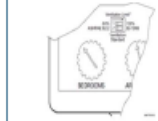


To Start

1. Know what your controls can and cannot do for you.
2. Know what you need for whole-house ventilation (raw numbers or calculated rates).
3. Understand the process and order of inputs for your controls.
4. Make sure you are recording how the controls are set.
5. Create documentation for both Northwest ENERGY STAR® Homes and the homeowners.

This is one example series for a specific controller.

Step 1: Set ventilation standard



HONEYWELL
Whole-House
Ventilation Control

Step 2: Set number of bedrooms, house size



Step 3: Measure or determine CFM

AIRFLOW DELIVERY VS NEGATIVE STATIC PRESSURE AS MEASURED FOR RETURN DUCT OR PLENUM (IN WC)													
DUCT LENGTH	.05		.10		.16		.20		.26		.30		
	FLEX	PIPE	FLEX	PIPE	FLEX	PIPE	FLEX	PIPE	FLEX	PIPE	FLEX	PIPE	
10 FT	80	85	85	90	105	110	120	125	135	140	150	160	
20 FT	55	60	60	65	100	105	115	120	130	135	140	150	
30 FT	50	55	75	80	85	100	110	115	125	130	130	140	

To learn more, visit: http://www.northwestenergy.com/products/ventilation/ventilation_products.html

REVISION DATE: 10/07/2013



DOCUMENT TITLE

Click To Edit Title



Click To Edit Subhead

Click to edit text

Insert CAD Detail or Graphic



Click to edit text

Insert Correct Photo



Click to edit text

Insert Incorrect Photo



To Learn More Visit: [Click to add link](#)

REVISION DATE: 00/00/0000

Insert Logo

Template Version

Idea Number Three

<p>Program Checklists</p> <p>Access guides directly from checklists for Zero Energy Ready Home, ENERGY STAR Certified Home, and Indoor airPLUS</p> 	<p>Building Components</p> <p>Access guides for new and existing homes based on building components of interest.</p> 
<p>Sales Tool</p> <p>Translate building science technical terms into a new language of value.</p> 	<p>Climate Packages</p> <p>Review new home energy efficiency specifications and case studies that exceed 2009 IECC by 30%.</p> 
<p>Building Science Pubs</p> <p>Search library of building science publications from Building America.</p> 	<p>Mobile App</p> <p>Join our mobile community to access saved field kits wherever you need them.</p> 

Use resources that provide consistency and are not proprietary

To earn the ENERGY STAR® label, new single-family homes must be built to the Northwest ENERGY STAR Homes Performance Path guidelines. Multifamily projects must be built to one of the Multifamily Builder Option Package, or BOPs. Click on the appropriate topic in the dropdown menu below to find these documents, other tools and resources to help you reach certification.

If you have any questions or cannot find a document you are looking for, please contact us.

Technical Resources	Marketing Materials	Current Incentives	Find a Verifier/Rater
<p>Select a Topic</p> <p>Technical Tools</p> <p>Apply</p>			
Title	Description	Updated	File
ASHRAE 62.2 - Table for Wallet Card	Printable wallet-card provides a cheat-sheet for calculating CFM	01/11/2016	Download
Mini-Split Technology in New Construction	Poster highlighting the benefits and considerations for four highly efficient heating and cooling strategies for advanced performance homes.	05/05/2015	Download
HRV System Best Practices	Educational tool to help builders and HVAC contractors understand key considerations for system selection, duct design and installation, and testing and commissioning.	05/05/2015	Download

FINAL THOUGHT

Use trainers that used to be contractors

OR

Invite your program contractors to participate in
designing your training program

Presentation Highlights: CLEAResult

- **Goals**: Set specific training goals that meet program goals.
- **Pain Points**: Reduce contractor “pain” points by hosting trainings on difficult or new industry standards:
 - CLEAResult developed a training with contractors that interpreted 15-year old specs for current equipment more effectively.
- **Market Successfully**: Market trainings using a multipronged effort:
 - Don’t flood your contractors with emails; think about the best day and time to reach your audience.
 - Partner with groups like Efficiency First chapters. Use shared training calendars and existing meetings to engage your audience.

**Lessons Learned:
Jeffrey Granger
New Mexico Energy \$mart Academy
Santa Fe Community College**

WHAT WORKS? (WHAT DIDN'T)

Jeffrey Granger, Trainer

New Mexico Energy\$mart Academy

Santa Fe Community College



IREC Accredited Programs / BPI Certifications

How do we know what we are looking for?

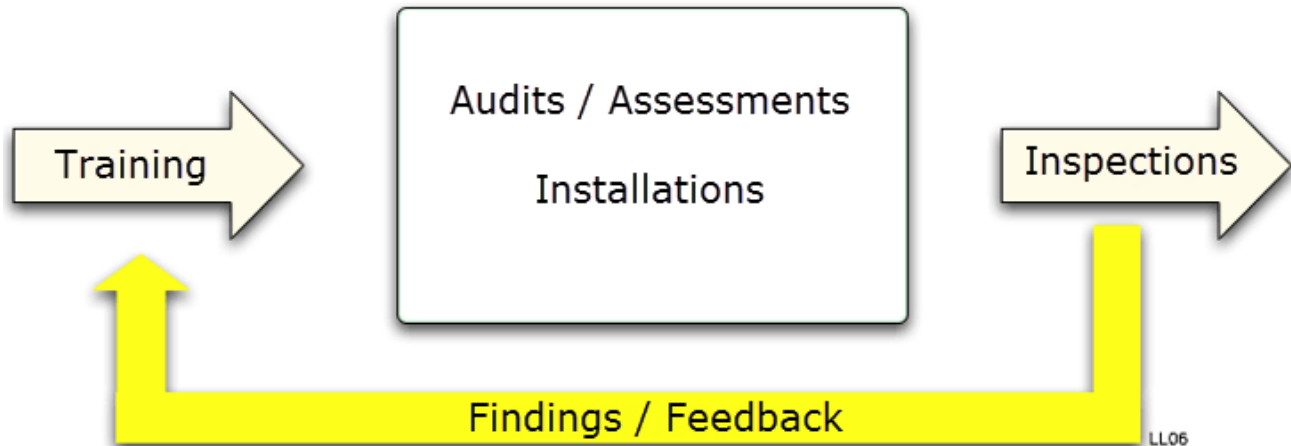
Metrics?

Job Task Analysis (JTA)

Standard Work Specifications (SWS)

State Standards

Training vs. Performance



How do we
know what we
are looking for?

Metrics?

**Job Task
Analysis (JTA)**

**Standard Work
Specifications
(SWS)**

State Standards

Training vs. Performance

*How do you know that your
training programs are working?*

How do you get feedback?

How do we
know what we
are looking for?

SWS

Standard Work Specifications

2.02 Combustion Safety

2.0201 Combustion Safety Testing-General

2.0201.1 Combustion Appliance Zone (CAZ) Testing

2.0201.1a	Assessment.....	35
2.0201.1b	Fuel leak detection	37
2.0201.1c	Venting.....	39
2.0201.1d	Base pressure test	41
2.0201.1e	Depressurization test.....	42
2.0201.1f	Spillage test.....	44
2.0201.1g	Carbon monoxide (CO) test in appliance vent	45
2.0201.1i	Combustion safety testing at completion of retrofitting home.....	47
2.0201.2	Combustion Safety	
2.0201.2a	Outside combustion make-up air.....	49
2.0201.2b	New appliances	51

How do we
know what we
are looking for?

SWS

Standard Work Specifications

2.0201.1c

Desired Outcome:

Accurate information about appliance safe operation is gathered

Specification(s):

Combustion venting systems will be inspected for damage, leaks, disconnections, inadequate slope, and other safety hazards

Objective(s):

Determine if a draft regulator is present and working and if vent system is in good condition and installed properly



If ventilation system puts occupants at risk, it needs immediate attention



Properly vented appliances make a house healthier and more efficient

How do we
know what we
are looking for?

sws

Standard Work Specifications

How are you using the SWS tool?



<https://sws.nrel.gov/>

How do we know if “they’re” listening?

Quizzes

Student Demos

Student Practice

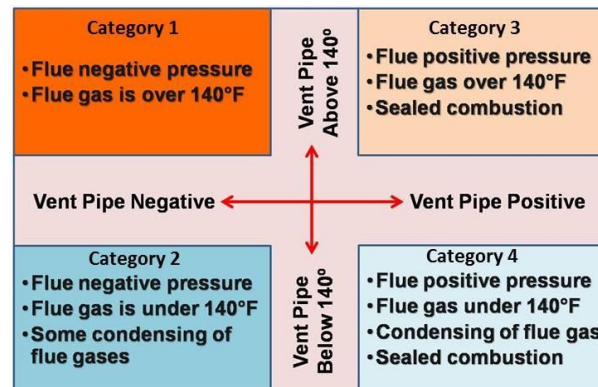
Student Teaching

Photos | Forms | Diagrams



CAZ Depressurization Test

	Day 1		Day 2		Day 3	
	CAZ Door		CAZ Door		CAZ Door	
	Open	Closed	Open	Closed	Open	Closed
Furnace Fan: OFF	_____ Pa	_____ Pa	_____ Pa	_____ Pa	_____ Pa	_____ Pa
Furnace Fan: ON*	_____ Pa	_____ Pa	_____ Pa	_____ Pa	_____ Pa	_____ Pa



I agree... Props Rule!

Teach Process

PPE Requirements

Case Studies

Multiple Vendors
(red & gold / black & white)



Distance Learning Prerequisite

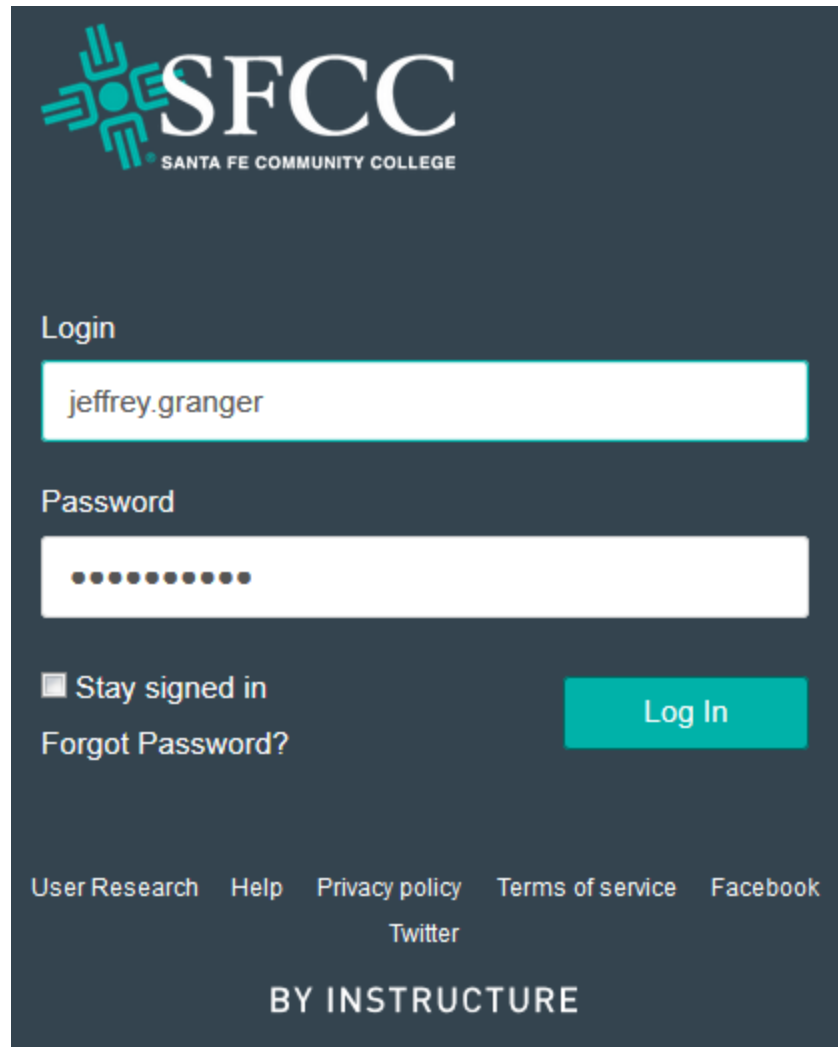
Retrofit Installer Technician

Energy Auditor

Crew Leader

QCI Multi-family

Quality Control Inspector



The image shows a login form for Santa Fe Community College (SFCC). At the top left is the SFCC logo, which consists of a stylized green and blue graphic of four hands holding a central circle, followed by the text "SFCC" in large white letters and "SANTA FE COMMUNITY COLLEGE" in smaller white letters below it. The form itself is on a dark blue background. It has a "Login" label above a white input field containing the text "jeffrey.granger". Below that is a "Password" label above another white input field filled with ten black dots. Under the password field is a checkbox labeled "Stay signed in". To the right of the checkbox is a teal "Log In" button. Below the checkbox is a link labeled "Forgot Password?". At the bottom of the form, there are several links: "User Research", "Help", "Privacy policy", "Terms of service", "Facebook", and "Twitter". At the very bottom, the text "BY INSTRUCTURE" is displayed in white capital letters.

Distance Learning Prerequisite



Crew Leader Training



Retrofit Installer Technician

Energy Auditor

Crew Leader

QCI Multi-family

Quality Control Inspector



Welcome to the Virtual Academy

We at the New Mexico Energy\$mart Academy would like to welcome you to this online training course for **Crew Leaders**. You are probably like us, and don't have much time in your normal day for training. Don't Panic. You can access your course from anywhere in the world as long as you can get an internet connection...even on your smartphone!

A syllabus for this course is available at this link: [Crew Leader Online Syllabus](#)  

To navigate through this course start by clicking on the **MODULES** tab on the left side of this page. You can identify the purpose of a Module, just by looking at its **icon**. Our courses generally have 4 types of Modules - Discussions, Pages, Assignments, and Quizzes.

In-person Classes

Retrofit Installer Technician

Energy Auditor

Crew Leader

QCI Multi-family

Quality Control Inspector

Reinforce Online Content



Add to the list....

Presentations

Videos

Props

Equipment

Forms

Checklists

Role Playing

Games

Textbooks

Distance Learning

*What are you using to train
employees or contractors that
wasn't mentioned?*

Presentation Highlights: Santa Fe CC

- **Feedback**: Use auditors to ensure trainings have positive impacts
- **State Focus**: Help contractors navigate local standards and specs.
- **Changes**: Train contractors to sell the value of change to consumers:
 - Communicate the value of automatic controls in new equipment
 - Training can help contractors explain the value of automatic controls in new equipment to clients.
- **Repetition, repetition, repetition**:
 - Before: Outline goals and skills to be addressed in training.
 - During: Use props and interactive materials to engage trainees.
 - After: Give tools, like templates, that can be used in the field.

Residential Program Solution Center Resources

Training resources to help you support your contractors:

- [Contractor Engagement & Workforce Development – Develop Resources](#) like procedures, forms, & materials.
- [How successful programs offered multiple training opportunities to contractors.](#)
- [Provide materials and training to ensure data quality, consistency, and accuracy.](#)



- While you're there, see the latest [Proven Practices](#) post on [Helping Contractors Sell Home Upgrades](#).
- The Solution Center is continually updated to support residential energy efficiency programs—**[member ideas are wanted!](#)**

Residential Program Solution Center Navigational Example

Contractor Engagement & Workforce Development – Develop Resources

Where Am I?

[PDF of handbook](#) [Print this handbook](#)

Description

Step-by-Step

Tips for Success

Examples

Toolbox

Topical Resources

Step-by-Step

Having defined your [contractor audience and program engagement plan](#), and created [evaluation plans](#) they need, and support quality installations of e

Develop training resources for participating contractors

At this point, you have [assessed the market](#) to determine skill gaps and training needs, [identified partners to help with training](#), and made [design decisions](#) about training and workforce development. These efforts should have helped you to identify any gaps in training at the intersection of program requirements, contractor skills, and training providers. To fill these gaps, you will likely need to develop resources to support technical and business skills training, and to establish mentoring processes to help home performance professionals develop and retain their skills. In this step, you'll learn about developing training resources by working with your training partners and the types of training to provide.

...cal resources, and on whether you've aligned program requirements with industry standards. In this area, you may have fewer resource-development needs. To the extent that you've met industry standards or that local training partners cannot meet your technical needs, though, you need to invest in developing training resources. In any event, you will want to work with your training partners, so that they understand program requirements and can better prepare contractors to meet

Home Energy Guide to Training Programs

Home Energy magazine maintains a [database of national, regional, and local training organizations](#) that can help you [find partners](#) to work with directly. Alternatively, some of your local partners may be able to team up with other training organizations to speed the development of technical training programs designed to meet the needs of contractors in your program.

RETURNING TRAINER SIGN IN | NEW TRAINER? REGISTER

User Name: [input] GO [forgot password?](#)

2015 Training Guide

HOME | TRAINING GUIDE HOME | LIST OF TRAINERS | FIND A PROGRAM | REGISTER A PROGRAM

Join hundreds of other students of whole-house performance by finding the training courses that meet your needs.

New trainings come about every day in areas like weatherization, auditing, and HERS rating so check back often!

Find a Training Program

Use the search form below to hone in on the right training for you in your area of North America and within your areas of interest. Come back often, as this list is ever-expanding! Good luck with your training!

Name of organization

National Regional
Both can be selected.

Are you looking for a specific trainer?

State or Province
- Please Select -

Which, if any, weatherization assistance program training areas are you interested in?

- Basic Competencies
- Safe Work Practices
- Installer
- Crew Chief
- Auditor
- Inspector
- Consumer Education
- Monitor (technical)
- Monitor (administrative)
- Program Manager

Solution Center Resource Slide Poll

- How have you used the Solution Center slide information after Peer Exchange calls?
 - N/A (this is my first Peer Exchange call) – **44%**
 - It caused me to explore the Solution Center – **31%**
 - I have explored one of the resources in depth – **13%**
 - I have not done anything based on the slide – **13%**
 - I have clicked on 1+ resource URLs on the slide – **0%**

Discussion Highlights

- **Use multiple learning methods** to create engaging training:
 - **Props:** mobile props can provide hands-on learning in the field.
 - **Virtual learning:** Create online learning opportunities.
 - **Public resources:** Use online databases; Don't reinvent the wheel.
 - **Custom materials:** Give trainees templates to fill in & customize.
 - **Role play:** Practice working with equipment & customers.

Closing Poll

- After today's call, what will you do?
 - Seek out additional information on one or more of the ideas – **54%**
 - Consider implementing one or more of the ideas discussed – **31%**
 - Make no changes to your current approach – **8%**
 - Other (please explain) – **8%**

Peer Exchange Call Series

We hold one Peer Exchange call the first four Thursdays of each month from 1:00-2:30 pm ET

Calls cover a range of topics, including financing & revenue, data & evaluation, business partners, multifamily housing, and marketing & outreach for all stages of program development and implementation.

Upcoming calls:

- April 21: Advances in Integrating Energy Efficiency into the Real Estate Market (301)
- April 28: Driving Change in Residential Energy Efficiency: Electric Vehicles (301)
- May 5 – No call
- May 12: Bullseye: Top Strategies for Targeted Marketing (101)
- May 19: Walking the Talk: Employer Assisted Programs (301)

Send call topic ideas to peerexchange@rossstrategic.com

See the Better Buildings Residential Network Program [website](#) to register

LET'S ALL MEET IN MAY!

REGISTER TODAY for the BETTER BUILDINGS SUMMIT

Washington, DC · May 9-11, 2016

This Summit will bring together Better Buildings partners and stakeholders to exchange best practices and discuss future opportunities for greater energy efficiency in America's homes and buildings.

There will be time set aside for a specific Residential Network discussion and meet-up! See the draft agenda [here](#).

Annual Member Reporting and Recognition

We are eager to hear about and recognize your accomplishments from 2015!

- Share your number of upgrades, and any related benefits
- New template makes it easier

Better Buildings
U.S. DEPARTMENT OF ENERGY

Reporting & Recognition Template

BETTER BUILDINGS RESIDENTIAL NETWORK

Please submit your organization's number of upgrades and associated benefits from fiscal year (FY) 2015 using this template by **May 13, 2016** to bbresidentialnetwork@ee.doe.gov, or provide the information requested below in another format, such as via email, a document, spreadsheet, graphic, or chart.

Organization name: _____

Name of contact: _____

UPGRADES:

_____ Home energy upgrades completed in FY 2015 (October 1, 2014 – September 30, 2015) *

The Better Buildings Residential Network defines a **home energy upgrade** as: Any transaction intended to improve a residential building's (e.g., single-family home, multifamily building) enclosure or mechanical system (e.g., insulation, air sealing, windows, HVAC, ducts, hot water).

*Note: If your organization does not directly complete home energy upgrades, please provide information related to the most significant aspect of your work concerning residential energy efficiency in the section below. Home Performance with ENERGY STAR® Sponsors, Georgetown University Energy Prize participants, and members that joined after March 31, 2016, do not need to report to the Residential Network.

BENEFITS:

Benefits associated with completed upgrades (feel free to attach more information):

Suggestions for benefits to include:

- ▶ Energy saved
- ▶ Money saved by consumers
- ▶ Economic impacts
- ▶ Trainings, assessments completed
- ▶ Partnerships
- ▶ Health benefits
- ▶ Environmental benefits (e.g. greenhouse gas or water savings)
- ▶ Jobs created or workers trained or certified

Benefits Examples from FY 2014 Reporting

- ▶ 78,530 MMBtu annual energy savings; \$60,256,000 lifetime cost benefit
— **Efficiency Maine**
- ▶ 250,080.17 kWh saved annually; \$62,006.91 annual cost savings; 33,589.82 therms saved annually
— **Civic Works, Baltimore, MD**

Brag a little! Are there any other accomplishments you'd like us to know about? Please share below or attach any relevant annual reports or accomplishment information.

If you have any questions, please email the Residential Network at bbresidentialnetwork@ee.doe.gov.

Learn more at betterbuildings.energy.gov/bbrn

U.S. DEPARTMENT OF ENERGY