



Better Buildings Neighborhood Program Data & Evaluation Peer Exchange Call: Tracking and Using Data to Support Revenue Streams

February 14, 2013

- Call Logistics and Attendance
- Discussion
 - Do programs have any lessons learned, success stories, or challenges with regard to tracking and using data to support revenue streams they would like to share?
 - How can data systems be tapped to support various revenue options?
 - What are the data needs of various partners (utilities, financial institutions, etc.) and do tracking systems provide this information?
 - What other questions or concerns do you have with regard to tracking and using data to support revenue streams?
- Future Call Topics

Participating Programs

- Atlanta, GA
- Austin, TX
- Bainbridge Island, WA
- Boulder County, CO
- Davis, CA
- Denver, CO
- Greensboro, NC
- Omaha and Lincoln, NE
- Nevada
- New York
- Southeast Energy Alliance
- Wisconsin



energysMART
Your Efficiency Solutions

Tracking Data and Reporting EnergySmart in Boulder County, CO

BB Peer Exchange Call on Tracking & Using Data

February 14, 2013

Dave Hatchimonji and Lea Yancey



energySMART

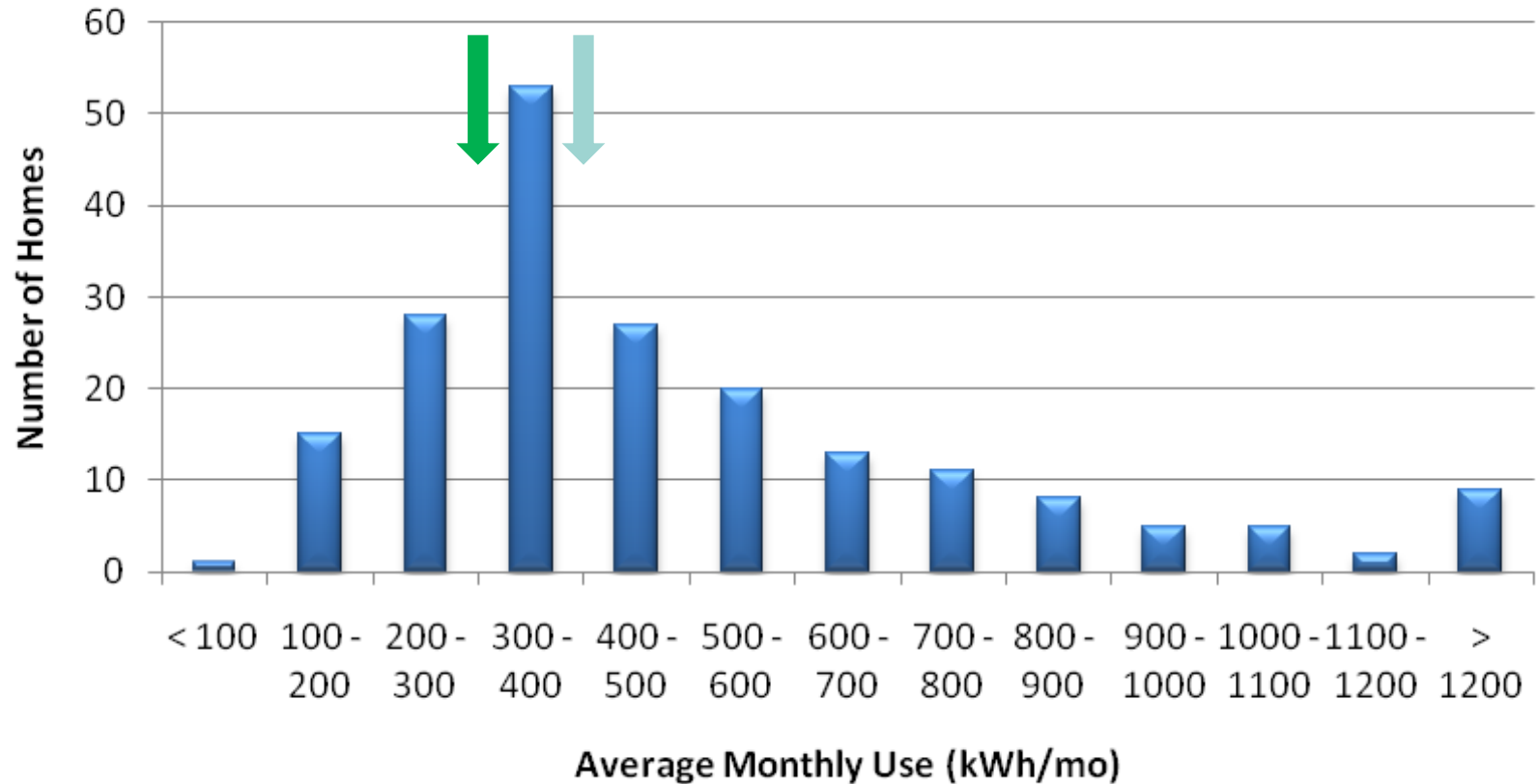
Your Efficiency Solutions



Databases Galore!

- For customer tracking and deemed savings:
 - Salesforce platform, cloud-based
 - Both residential and commercial programs
- For actual energy consumption:
 - Sustainability Information Management System (SIMS) by ICF International
- For Financials and Invoicing:
 - Internal County system

The Wave of Residential Energy Use by Home Size

Average Monthly Use (1,000 - 1,500 sf Homes)

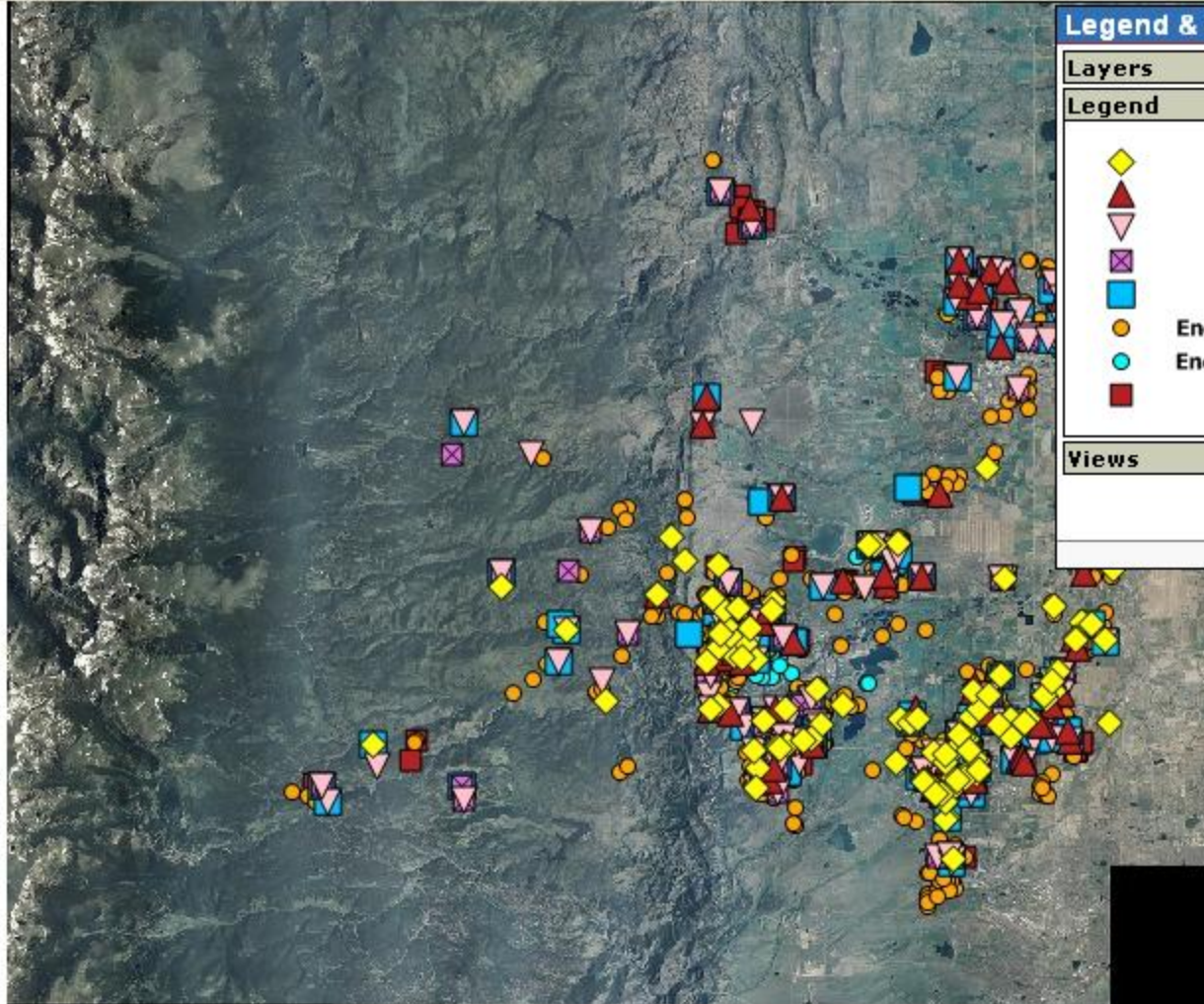


 25th %Tile ("Efficient")
 Median ("Average")

From SIMS (Sustainability Information Management System), by ICF International

SIMS (Sustainability Information Management System)

Advanced Data Visualization



Legend & Analysis Tools

Layers

Legend

- CSLP - PV
- CSLP - Furnace
- CSLP - Insulation
- CSLP - Air Sealing
- CSLP - Windows
- Energy Smart - Residential
- EnergySmart - Commercial
- Energy Corps

Views

X: -5801.31 m Y: 28871.53 m [switch to Long/Lat coord.](#)

scale 1:

Coordinate System: Transverse Mercator

logged as: and

City and County of Denver

BB Peer Exchange Call Tracking and Using Data (to support revenue streams)

Sharon Procopio, P.E.
February 14, 2013

Data Collection - Highlights

- Similar to Boulder
- Common database for commercial and residential accounts
- Multiple partners provide data
- Initially energy focused, now expanding

Data Collection - Lessons Learned

As you determine what data to collect and track:

- Don't overcomplicate!
- Evaluate + prioritize “Inputs you need” vs. “Inputs you can realistically get” (blank fields aren't useful!)
- Consider what reports (outputs) you want/need, who will see them, and how often they will change
 - Backfilling newly added data fields is no fun!
- Overcoming the having data vs using data challenge
- Collecting Data requires trust → use it wisely

Data Collection - Opportunities

- **Current Data Uses**

- Targeting marketing about new and upcoming program services
 - by neighborhood/council district/building size/program status/last contact date/etc
- Looking at past upgrades to ID next opportunities for action / upgrade

- **Other Potential Data Uses**

- To Demonstrate successful conversion rates, cost/kwh, GHG
 - Could justify service fees, external funding, lobby support, ???
- Connecting “hot leads” with the right service provider
- Streamlining programs and improving follow up + connections

- Obtaining real time data can be difficult. Different locations may have different processes to obtain data based on regulations and the type of utility
 - Often programs have to use legal means with Public Utility Commissions to obtain data. This can require strong allies and legal partners.
 - Once access to data has been achieved, a hurdle can be the format in which the utility can provide the data.
- If you cannot get ideal data, work with what you can get
 - Denver did a random sample of commercial customers to analyze data while their system was being set up. They also did their own case studies. This was not as easy and was more time consuming, but provided ways to use information before their system was ready.
- Protect data and make it clear to participants how data will be used and shared. Have a clear process for how to use customers' data in place

Lessons Learned: Data Tracking Systems



- Focus early discussions on what data to collect based on its end use and the end user's needs. This can help to keep the data tracking system from becoming too complex
- Be adaptable to changes during the program, but keep the system as simple as possible
- Adding fields into the system later creates a time-consuming process of inputting information for each entry
- Many programs on the call use Salesforce as their data tracking system
 - Nevada uses it as their project management software and has enabled it to notify contractors when homeowners are added, track leads, track marketing and outreach activities, and track loan data and approvals in real time. This system has been more manageable than Excel for Nevada.

Lessons Learned: Supporting Alternative Revenue Streams



- Denver was able to secure post-grant funding through the city budget by pulling on-demand reports to show the value of the program with GHG reduction, outreach and conversion rate information. Denver is considering using this type of information to secure foundation or other support in the future.
- Denver and Boulder partner with Colorado University to provide loans to businesses and residences. They are discussing adding a fee for the advising service into the loan that could help provide long-term sustainability. They would use their data to help market to some of the target audiences.

Lessons Learned: Supporting Alternative Revenue Streams



- Nevada has a small revenue stream from processing rebates for utilities.
- Programs can use data (e.g., on successful conversion rates) to acquire alternative funding sources. It is important to use the right data that appeals to the specific funder.

Future Call Topics

Future Call Topic

- Using Home Energy Scoring Systems

What other topics are of interest for future Data and Evaluation calls?

- Weather normalizing data