



# Top Lessons Learned for Residential Energy Efficiency Program Design

# Agenda

**I. Welcome and Introductions**

**II. Polling Questions**

**III. Better Buildings Neighborhood Program**

**IV. Grantees – Then and Now**

**V. Better Buildings Residential Network**

# Polling Questions

## What sector do you work in?

- Local government
- State government
- Federal government
- Nonprofit
- Utility
- Business

# Polling Questions

**How long have you been working in the field of residential energy efficiency?**

- 0-1 years
- 2-5 years
- 6-10 years
- 11-20 years
- 21+ years

# Polling Questions

## What do you do?

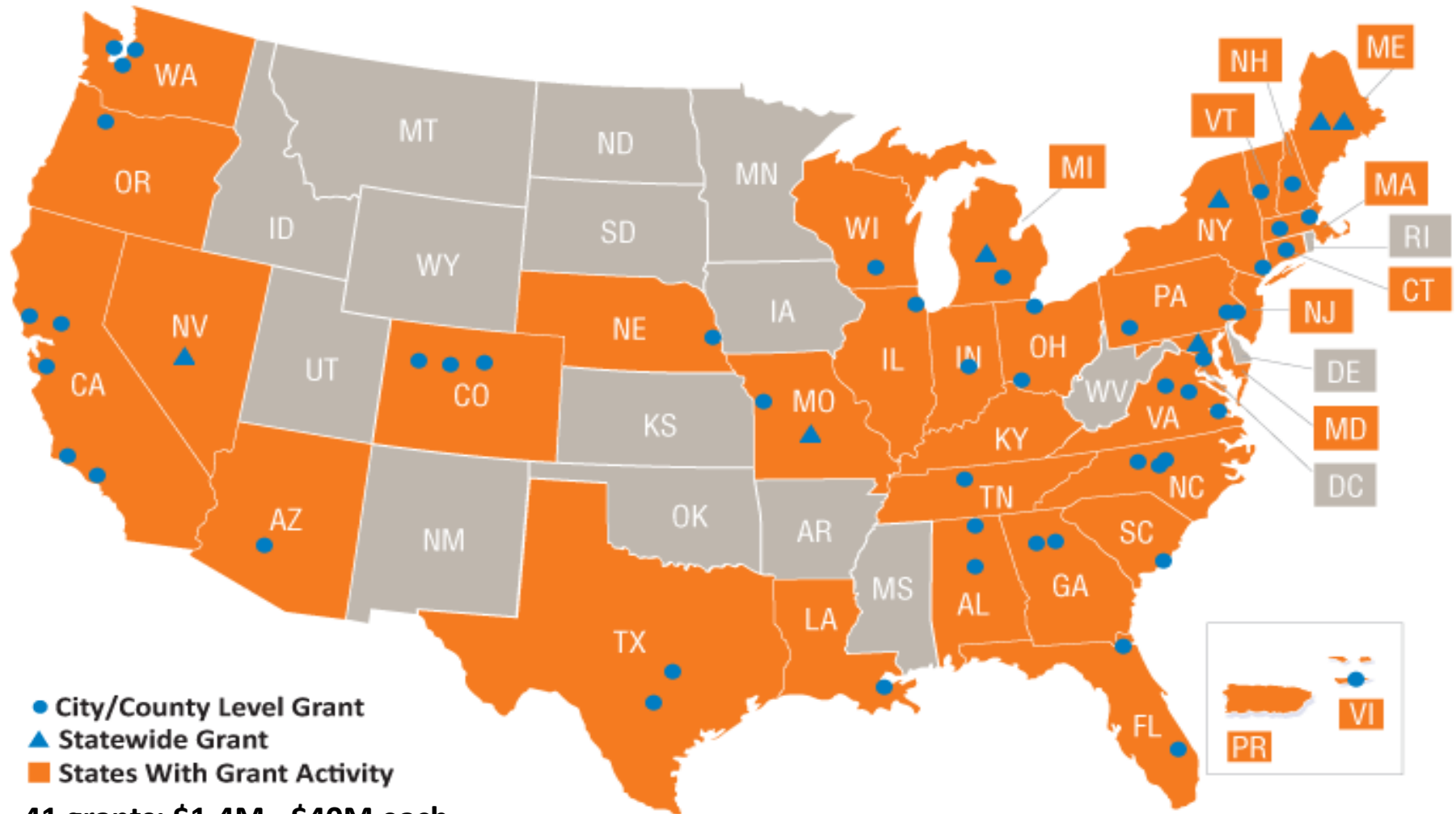
- Fund energy efficiency programs
- Implement energy efficiency programs
- Work in homes to make more energy efficient
- Consult to energy efficiency programs
- Evaluate energy efficiency programs

# Better Buildings Neighborhood Program

- Leveraged \$508M in ARRA and FY10 funding to spur nationwide energy efficiency program innovation
- Targeted urban, suburban, and rural environments
- Capitalized on economies of scale
- Encouraged industry partnerships and investment
- Emphasize sustainability beyond the grant
- Learn what is effective and replicable

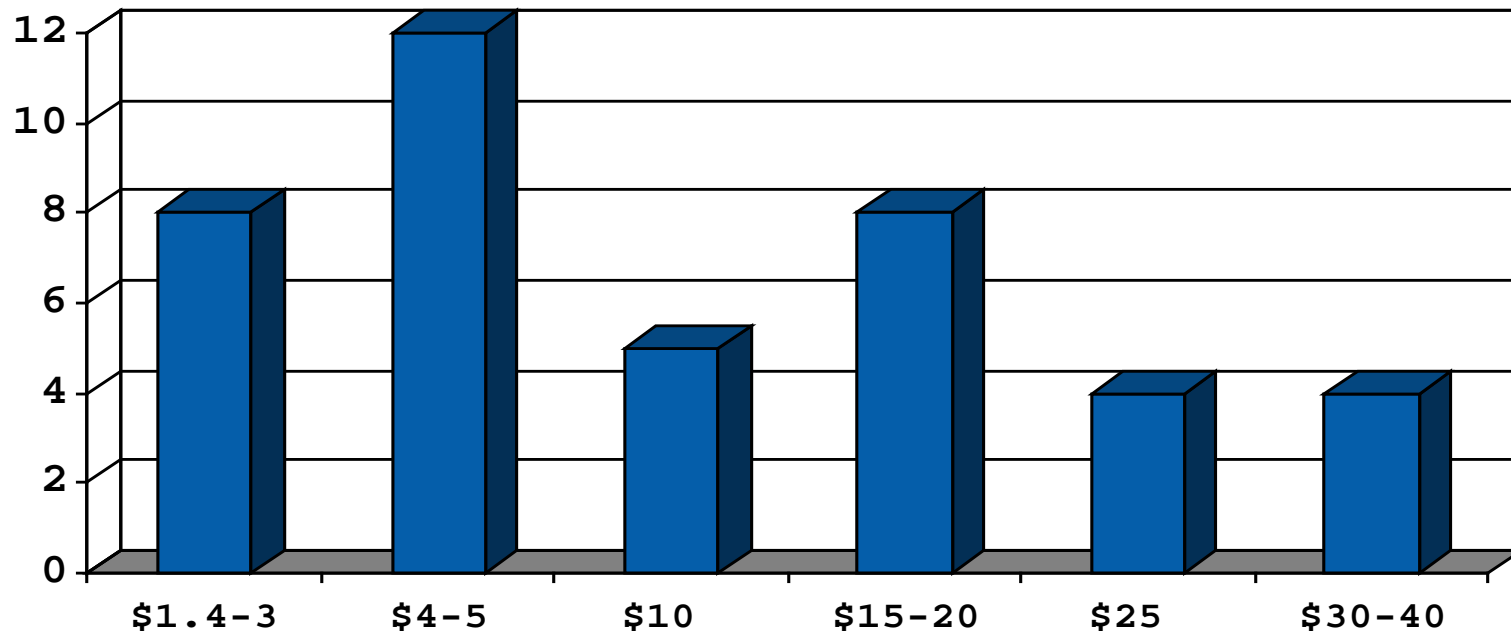
**BBNP leveraged federal support to promote program innovation and market investment**

# BBNP Accomplishments - Graphic



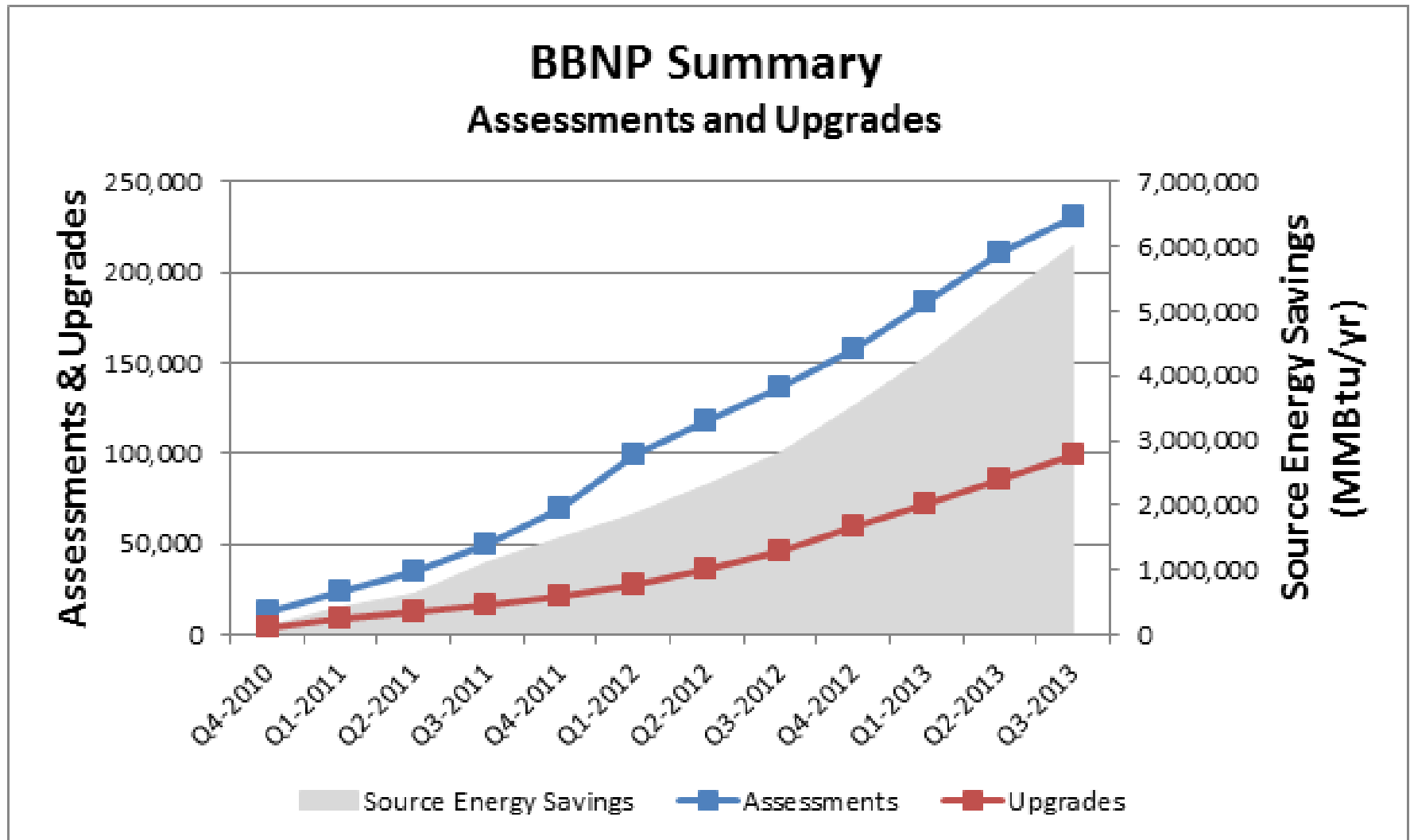
# BBNP – Grantee Types and Amounts

- 13 state governments
- 24 local governments
- 4 non-profit organizations





# BBNP Accomplishments - Graphic



# BBNP Accomplishments - Numbers

- Upgraded >115,000 homes
- Performed >200,000 energy assessments
- Saved consumers >\$940M in estimated lifetime energy savings (and improved comfort)
- >7M MMBtu energy savings
- Trained >5,600 home performance workers
- Completed >\$878M of energy upgrades
- Leveraged >\$440M in capital for financing

# Welcome to the Residential Program Solution Center!

U.S. DEPARTMENT OF ENERGY | Energy Efficiency & Renewable Energy

## Better Buildings Residential Program Solution Center

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EERE » BTQ » Better Buildings Neighborhood Program » Solution Center Home »

**Solution Center Home**

- About
- Handbook Index
- Quick Links
- Proven Practices
- Energy Data Facts
- Glossary

**BROWSE BY:**

- Program Components
- Program Design Phases
- Content Types



**Get Started**

Whether you are serving a new market or adding new energy efficiency services to your portfolio, the Solution Center has the information you need to get started.



**Explore the Solution Center**



**THIS MONTH'S SHORTCUTS**

- [What messages have been effective?](#)
- [Is it important for us to regularly evaluate the program's market position?](#)
- [How do we determine what program services to provide?](#)

**PROVEN PRACTICES**



**Provide homeowners one point of contact**



[Put this widget on your website](#)

**RECENTLY UPDATED RESOURCES**

- [State and Utility Pollution Reduction Calculator Version 2 \(SUPR 2\)](#)
- [Maryland Department of Housing and Community Development Multi-family Energy Efficiency Housing Affordability \(MEEHA\)](#)
- [Serving Multifamily Building Owners: A Full Service Comprehensive Approach for Improving Existing Buildings](#)
- [Next Steps for Improving Energy Efficiency in Multi-Family Affordable Housing](#)
- [Overcoming the Home Upgrade Tower of Babel with HPXML](#)

# Solution Center Framework



# Highlights of the Solution Center

- Solution Center Home
- About
  - Getting Started
  - How to Submit Content
- Handbook Index
- Quick Links
- Proven Practices**
- Energy Data Facts
- Glossary
- BROWSE BY:
  - Program Components
  - Program Design Phases
  - Content Types

U.S. DEPARTMENT OF ENERGY Energy Efficiency & Renewable Energy

## Better Buildings Residential Program Solution Center

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Enter your keywords

EERE » BTO » Better Buildings Neighborhood Program » Solution Center Home »

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**Explore the Solution Center**

- Market Position & Business Model
- Program Design & Customer Experience
- Evaluation & Data Collection
- Marketing & Outreach
- Financing
- Contractor Engagement & Workforce Development

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# Proven Practices

Lessons learned, program examples, videos, and helpful tips to take your program to the next level.

**Better Buildings**  
U.S. DEPARTMENT OF ENERGY

Offer home  
Plan for h

**Better Buildings**  
U.S. DEPARTMENT OF ENERGY

**Host in-home events to jump-start outreach**

**Tell me more**

## Proven Practices: Host in-Home Events to Jump-Start Outreach

Posted on July 21, 2015

Most residential energy efficiency programs eventually find themselves asking, **how can we jump-start our outreach to get better results?** Successful programs across the United States have used in-home events to make upgrade benefits visible by [showcasing completed projects and actual results](#). Attending tours of upgraded homes—especially the homes of trusted neighbors and friends—allows potential customers to see and hear firsthand from satisfied customers, talk directly to the contractors who performed the work, and ask questions or sign up with program staff to start the upgrade process.

A few proven practices to making upgrade benefits visible include:

### Show How Assessments Work

Energy Impact Illinois used "house parties" to build momentum for energy assessments and upgrades by leveraging the credibility of trusted neighbors who hosted contractors to show guests where energy was being wasted and explain ways to improve comfort while saving energy. Discover how [Energy Impact Illinois Learned That Parties Sell Upgrades](#).

### Hold House Tours

NOLA WISE (New Orleans, Louisiana Worthwhile Investments Save Energy) gave open house tours in the upgraded homes of happy clients. Signs throughout the house and the upgrade contractor highlighted the work that was completed and the associated energy savings.

### Invite the Whole Neighborhood

In Jacksonville, Florida, Shop Smart with JEA fostered community awareness with the Home Energy Makeover: Block Party. Homeowners who contracted with a local energy professional to receive a home energy assessment offered to host block parties for their neighbors, and the energy professional reviewed the assessment and upgrade process, discussed rebate options, and answered questions from friends and neighbors who attended the parties.

### Make Efficiency Personal

The California Center for Sustainable Energy (CCSE) provided demonstration tours in homes that completed upgrades in Chula Vista, California. Potential customers could learn about their neighbors' experiences, ask questions of the home performance professionals who installed the upgrades, and sign up for an energy assessment of their own home for less than \$50.

### Tell Me More

Discover more residential energy efficiency outreach tips by visiting the [Marketing & Outreach – Develop Implementation Plans](#) handbook for step-by-step instructions and program examples. Here you will find information on in-home outreach, as well as some of these other solutions:



# Access the Solution Center: [energy.gov/rpsc](http://energy.gov/rpsc)

The image displays a screenshot of the Better Buildings Residential Program Solution Center website. The page features a navigation menu on the left with links such as 'Solution Center Home', 'About', 'Handbook Index', 'Quick Links', 'Proven Practices', 'Energy Data Facts', and 'Glossary'. A central graphic shows a compass on a keyboard with the text 'Take a Tour of the Solution Center' and 'Learn how to navigate the Solution Center and access examples, lessons, and other resources for residential energy efficiency programs.' Below this, a flowchart titled 'Explore the Solution Center' includes icons for 'Market Position & Business Model', 'Program Design & Customer Experience', and 'Evaluation & Data Collection'. A 'RECENTLY UPDATED RESOURCES' section lists various articles and reports. A process flow diagram on the right consists of four steps: Strategy Development (target icon), Planning (worker icon), Implementation (checkmarks icon), and Evaluation (magnifying glass icon).

**Strategy Development**

**Planning**

**Implementation**

**Evaluation**

**Better Buildings**  
U.S. DEPARTMENT OF ENERGY

# 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**:

- Recognition: Media, materials
- Weekly Peer Exchange Calls
- Tools, templates, & resources
- Voluntary member initiatives
- Newsletter updates on trends
- Speaking opportunities
- Sample tweet, newsletter article announcing membership

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





**energySMART**

*Your Efficiency Solutions*

## Lessons Learned During the Grant

- Using a CRM system – Data tracking and reporting
- Financing Product – They are only tools
- The Advisor Model – Hand hold them to success



**energySMART**

*Your Efficiency Solutions*

## Lessons Learned After the Grant

- Marketing and Outreach – Learning how to do a lot with much less
- Stay Nimble – Programs shift as needs shift
- Partnerships – Growing the program

# **Top Lessons Learned for Residential Energy Efficiency Program Design**

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*Tim Miller, CEO, Enhabit*





## Why did we replace our name?

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Alignment with our customer orientation

Better reflection of our expanded services

# Program Overview

- *Statewide, from Portland pilot*
- *Contractors, lenders, communities*
- *Deep retrofits – \$13-15K average*
- *Approaching 5,000 homes and \$100million economic development!*

## *Special ingredients*

- *LLR, on-bill, and 2ndary market sale*
- *Branded marketing investment*
- *Follow-on state investment*



# Lessons and the Road Ahead

- *The market matters*
  - Gas prices >> cost-effectiveness >> incentives
  - Economy >> contractor interest
  - Real estate >> homeowner goals
- *Solution: Evolution*
  - Diversification: solar, seismic, health ... and new stakeholders
  - Paradigm: earnings & initiatives
  - New brand & message



## Additional Information

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# Working with Partners

*Recent activity:*



FEMA



NW Natural



City of Seattle



BULLITT  
FOUNDATION

*and lots more ...*





*“If you spend the money now, you won’t spend it on utility bills or trips to the hospital because of your asthma or because you got a disease.”*

*-- Gerry Winfield  
Enhabit Homeowner*

#### **THE WORK**

- Air sealing + Duct sealing
- Insulate attic, walls, floors
- Window replacement

#### **THE COST**

\$15,000

#### **THE RESULTS**

Less drafts  
Healthier indoor air  
Lower utility bills

# **Top Lessons Learned for Residential Energy Efficiency Program Design**

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*Tim Miller, CEO, Enhabit*





eco  
ENVIRONMENTAL  
COLLABORATION  
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ecoCITY of MILWAUKEE

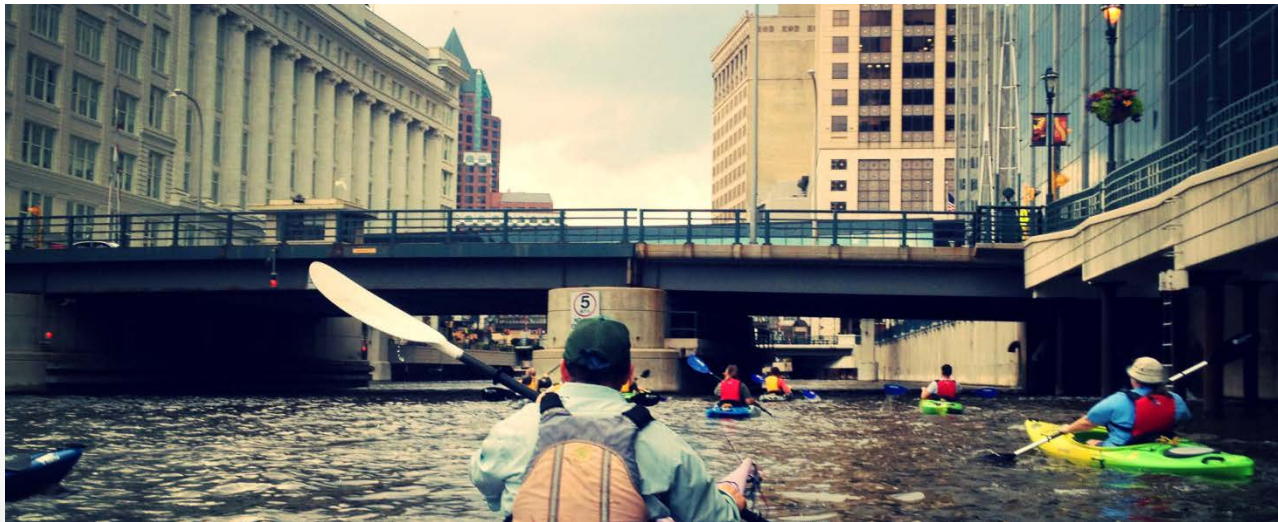
# Top Lessons Learned for Residential Energy Efficiency Program Design

Lessons from the eco City of Milwaukee

# CITIES & SUSTAINABILITY

The City of Milwaukee the Environmental Collaboration Office (ECO) was created by Mayor Tom Barrett to enhance Milwaukee's sustainability and position the city as a national leader in sustainability performance.

ECO has helped thousands of homeowners and hundreds of businesses and organizations achieve their sustainability goals while reducing emissions, waste and resource inefficiencies.



# Milwaukee Energy Programs



**Me2**  
MILWAUKEE  
ENERGY  
EFFICIENCY

ecoCITY of MILWAUKEE



**ME3**  
MILWAUKEE  
SUSTAINABLE  
MANUFACTURING

ecoCITY of MILWAUKEE



**PACE**  
FINANCING

ecoCITY of  
MILWAUKEE



Milwaukee  
**SHINES**

ecoCITY of  
MILWAUKEE



**Better Buildings**  
**CHALLENGE**  
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MILWAUKEE

# Program Description

The Milwaukee Energy Efficiency program, or Me<sup>2</sup>, helps homeowners upgrade their homes with energy saving improvements like new insulation, heating and cooling equipment. These improvements can help improve the **comfort** and **durability** of your home while **saving energy**.

The program pairs **Cash Back rewards** from the statewide Focus on Energy Program with an **affordable loan** option through Summit Credit Union.

With these financing tools, you can pay for qualifying home improvements as you save on your energy bill!



# A Brief History of Me<sup>2</sup>

- 2010 launch with ARRA and US DOE investment
- Program's height was 2010-2013 with heavy ARRA investment
- "Post-grant" period continues to offer energy loans with vastly reduced staffing



# Making Lemonade

- Less staff → streamlined process
- Less regulation on energy saving → more measures and new contractor reach
- Windows
- Loans as centerpiece





# Program Redesign

Old Program	New Program
Energy Advocates	Contractors sell the program
Me <sup>2</sup> incentives + statewide incentives	Statewide incentives only
Summit Credit Union Loans	Summit Credit Union loans with streamlined approvals
Energy audit required	Energy audit required only as part of HPwES; stand alone HVAC projects do not require energy audit
Compass/Surveyor energy audit tool	No separate Me2 audit tool.
10% minimum energy savings	Eligible measures
Heavy staff involvement on each project	Easy process means customers work directly with Contractor and Credit Union
Heavy Program Marketing	Light Program Marketing

# Me<sup>2</sup> Financing

- Easy application process
- No down payment
- Affordable fixed interest rate
- Expanded access to credit
- No home equity required
- Customer repays loan while saving on energy bills
- Summit pays contractor directly on project completion
  - 30% construction advance allowed



# Marketing Tips

- Focus on customer priorities
- Energy efficiency is often not primary customer driver
- Educate, re-educate, and educate contractors again and again.
- Affordable monthly payments



# Your Community Needs Energy Efficiency Leaders Like You

- ARRA was the beginning, not the end
- Communicate your successes
- Tie the continuation of your program to senior leadership's goals (i.e. jobs)
- Adapt and advance



# STAY CONNECTED

A photograph of the Milwaukee skyline at dusk. The sky is a deep blue with scattered clouds. In the foreground, a body of water reflects the city lights. On the left, a large, modern building with a curved roof and illuminated interior is visible. In the background, several skyscrapers are lit up, including the prominent PNC Tower. The right side of the image shows a rocky shoreline in the foreground.

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