



Program Experiences: Lessons
Learned from the Better Buildings
Neighborhood Program
Danielle Sass Byrnett

June 24, 2014

Agenda

- National Better Buildings Neighborhood Program
 - Brief Overview & Results
 - Data releases (first webcast July 9, 2014)
- Program Legacies:
 - Program Experiences & Lessons Learned
 - Better Buildings Residential Program Solution Center
 - Learn about >1,000 program examples
 - Start using now: become a beta user
 - Better Buildings Residential Network
- Q&A throughout

Better Buildings Neighborhood Program

- July 5, 2010: Kick-off (Retrofit Ramp-Up)
- Leverage \$508M in ARRA and FY10 funding to spur nationwide energy efficiency program innovation
- Target urban, suburban, and rural environments
- Capitalize on economies of scale
- Encourage industry partnerships and investment
- Emphasize sustainability beyond the grant
- Learn what is effective and replicable

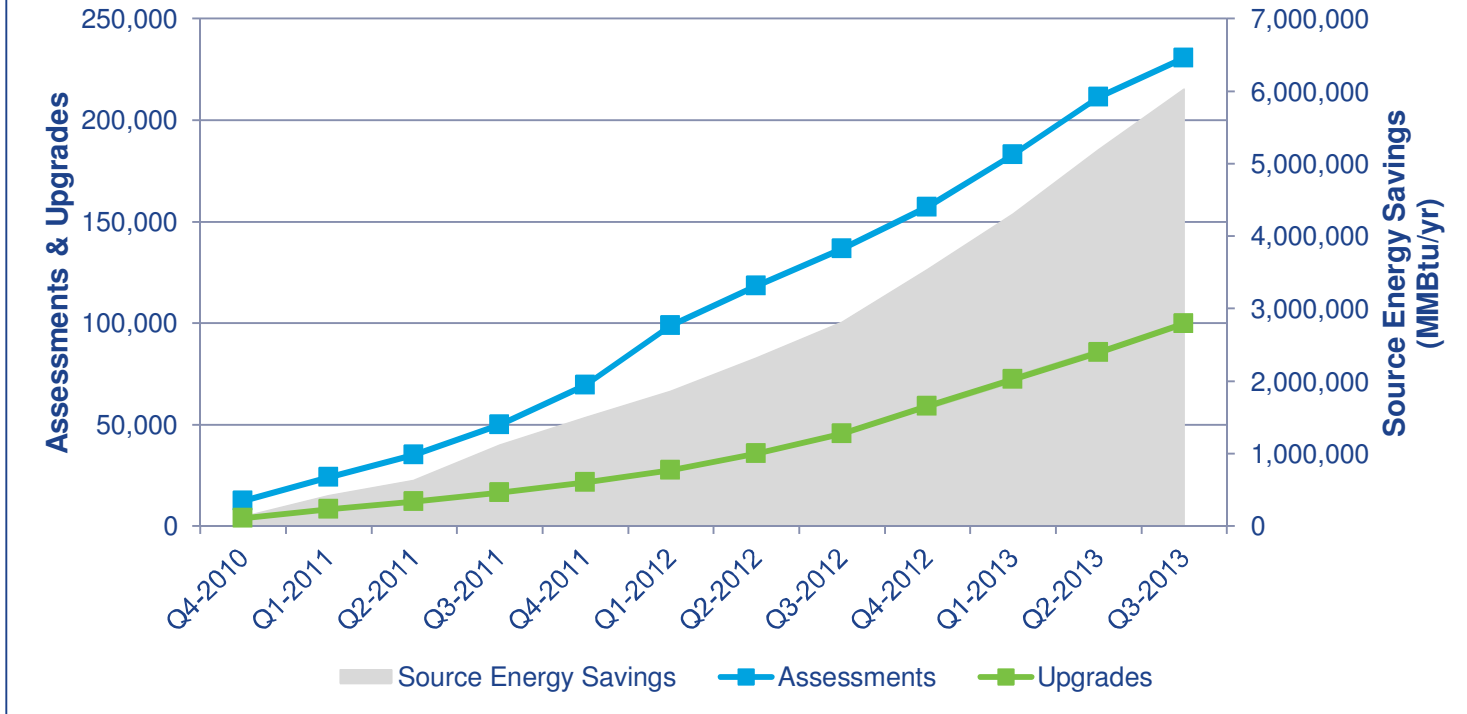
The Better Buildings Neighborhood Program used federal support to promote program innovation and market investment

All Goals Met!

BBNP Goals: Dec. 2013	Accomplishments: Dec. 2013
Upgrade more than 100,000 buildings	101,482 homes upgraded (single-family and multifamily) 3,858 commercial buildings upgraded (more than 83 million sq. ft.)
Achieve 15% to 30% energy savings	Average home energy savings of 22 to 26%
Save consumers \$65M annually	\$74M annual gross estimated savings More than \$730M gross estimated lifetime energy cost savings
Leverage \$1- \$3B in additional resources	Over \$770M non-BBNP expenditures (other federal and non-federal sources) Over \$440M in private and federal loan capital (>12,000 upgrades financed)
Reduce program delivery cost 20% or more	On target; evaluation complete in 2014
Create or retain 10,000 – 30,000 jobs	On target; evaluation complete in 2014

Assessment & Upgrades Summary

BBNP Data Summary (through 9/30/2013)
Assessments and Upgrades



↑
More than 80 million square feet of commercial bldg. space upgraded!
 2010 Q4 - 2013 Q4

	Residential Single-Family	Residential Multi-Family Units	Commercial Buildings	Industrial Buildings	Agricultural Buildings
Assessments	138,323	84,476	7,323	36	276
Upgrades	74,680	21,330	3,547	15	163

Sizable Data Sets Will Be Available

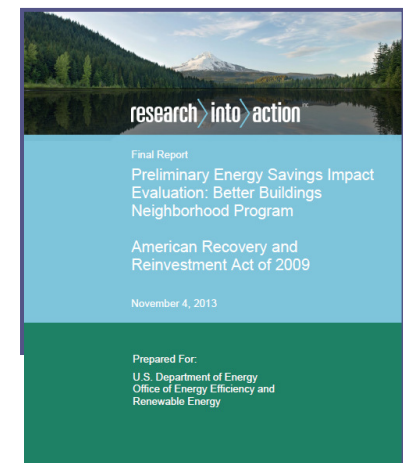
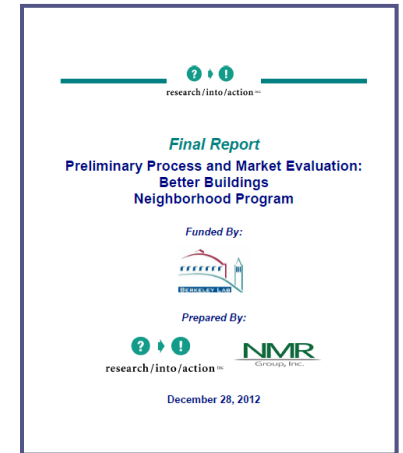
- BBNP Independent Evaluations [next slide]
- Recovery.gov/arra data (jobs, expenditures by recipient, sub-grants and vendors)
- BBNP Summary of Reported Data (reports)
 - Programmatic data from 41 grants implementing diverse program strategies over 2½ years
 - Webcast Weds, July 9, 2014 from 3 to 4pm ET
- Building Upgrade Data
 - ~75,000 Residential Single-Family Building records
 - ~9,600 Residential Multi-family Unit records
 - ~800 Residential Multi-family Building records
 - ~3,500 Commercial Building records
 - ~12,000 records with loans
 - ~5000 with normalized consumption before and after the upgrade.
- Grant Recipients' Final Reports (results, strategies used, lessons learned, next steps)

BBNP Independent Evaluations

Evaluation Team: Research Into Action, Nexant, Evergreen Economics, and NMR Group

- Preliminary Process and Market Evaluation
 - Completed Spring 2013
- Preliminary Energy Savings Impact Evaluation
 - Completed Fall 2013
- Final Process and Market Evaluation
 - Report Anticipated Late 2014
- Final Energy Savings Impact Evaluation
 - Report Anticipated Early 2015
- Additional Research Questions
 - Anticipated 2015

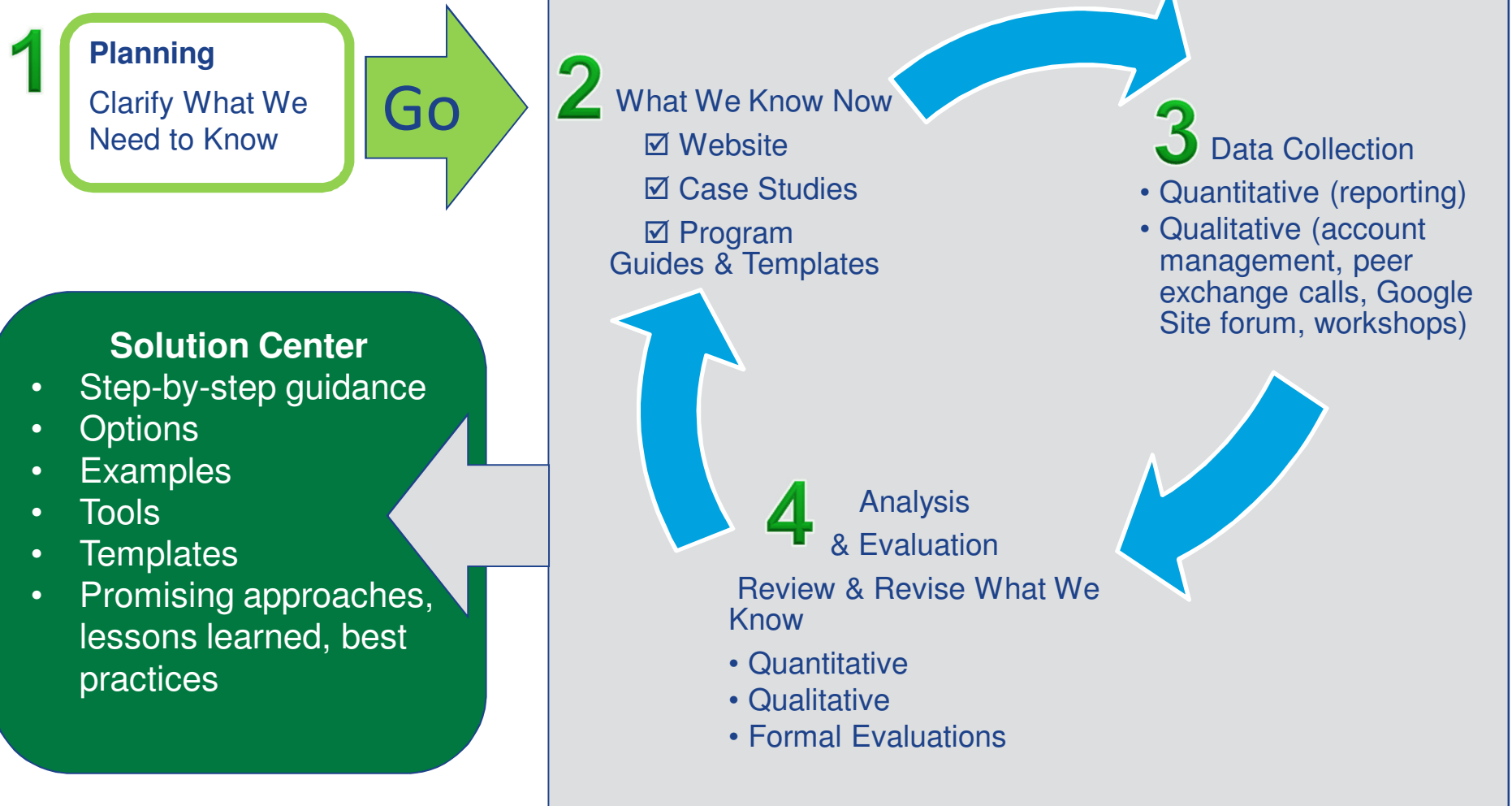
www.betterbuildings.energy.gov/neighborhoods
→ Tools & Resources → Program Evaluation



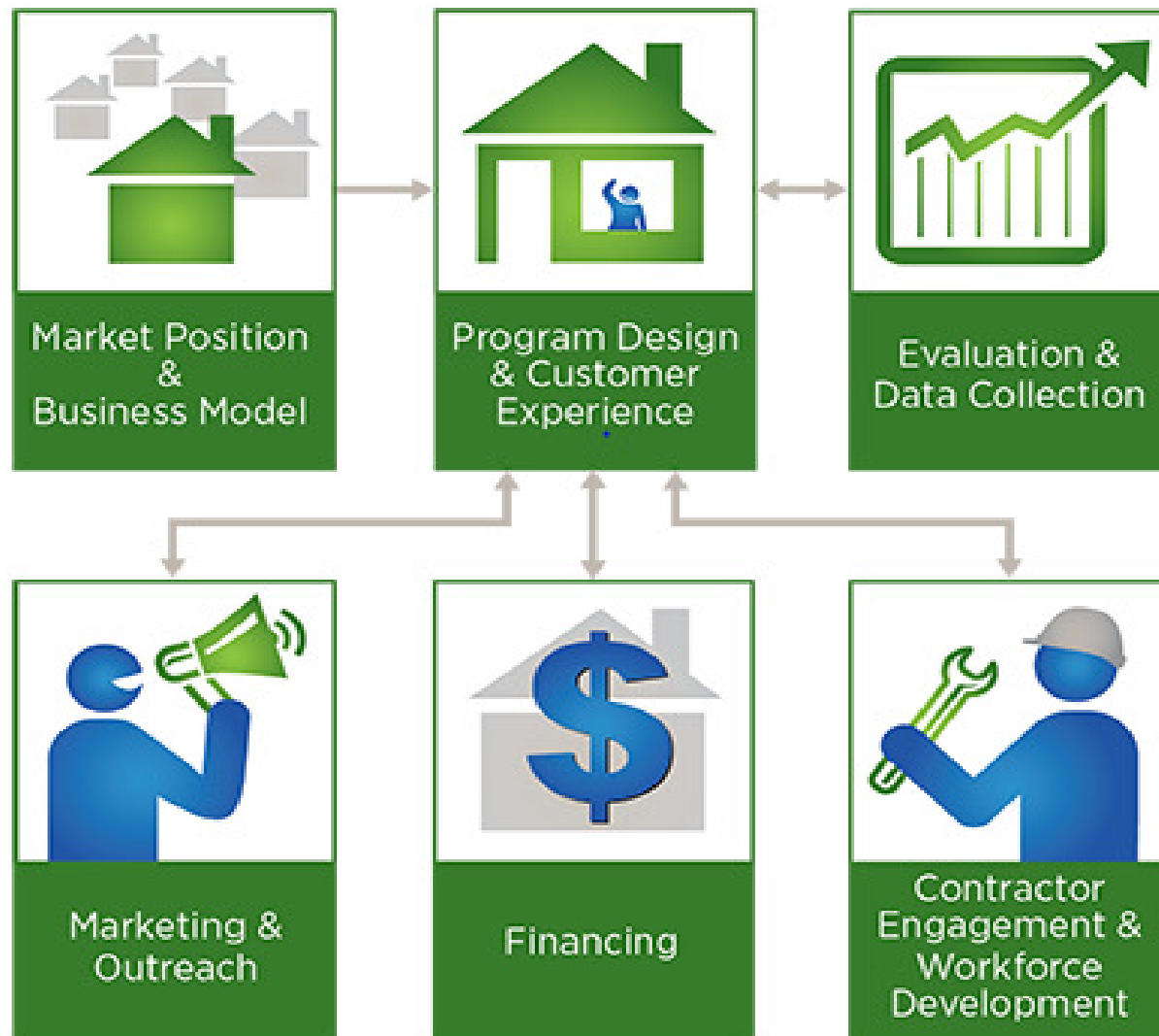
Legacies of Better Buildings Neighborhood Program

Program Experiences & Lessons Learned

BBNP Commitment to Learning & Sharing



Components of an Effective Residential EE Program



Program Design & Customer Experience

- **Provide the customer with a single point of contact to help them through the upgrade process**
- Keep the program simple for your contractors
- Keep the program simple for your customers
- Develop partnerships based on an alignment of goals, strong collaboration, and consistent communication
- Make sure there are enough customers in your target market to meet your goals and attract partners
- Aim for early wins that showcase upgrades to attract customers and partners
- Emphasize the action you want your customer to take
- Good news is addictive – spread news about program accomplishments widely and often
- Make upgrade options clear and concise for customers
- Measure and evaluate performance at key points in the process
- Provide adequate time for data system development and testing
- Recognize customers who make improvements
- Set realistic expectations about program milestones and interim accomplishments

Lesson Learned: Program Design

Provide the customer with a single point of contact to help them through the upgrade process

Despite programs' best efforts to design simple processes for customers, homeowners often face unavoidable program complexity as they select contractors, apply for financing, and determine what upgrade measures to pursue. To overcome this barrier, several programs have successfully used energy advisors or other single points of contact to help guide customers through the upgrade process and provide them with neutral, third-party advice.

- The [EnergySmart program](#) in Boulder County, Colorado, found that having an energy advisor assigned to each program participant through the home energy upgrade process was a key to program success. Energy advisors built trust with the customer during an initial home visit and maintained a one-on-one relationship with homeowners throughout the process. The relationship endured even after the upgrade: energy advisors remained available to discuss future home up- of customers rated their energy advisor as professional, knowledgeable, and "been worth my time and effort." In Boulder, around 60-70% of homes.
- Energy advisors for the [Greater Cincinnati Energy Alliance](#) (GCEA) guided customers through the upgrade process, from requesting an assessment to hiring a contractor. This support made potential customers more comfortable with the program.
- Energy advisors for [Clean Energy Works Oregon](#) (CEWO) provided customers with a free energy assessment—as well as checked the quality of assessors' work and helped them identify and resolve problems or delays and prevent future issues. Customers appreciated having a personalized and customized experience.
- The [Denver Energy Challenge](#) provided customers with free energy audits and facilitated energy efficiency improvements. Starting with an initial energy audit, customers could explore financing options, find qualified home improvement contractors, and receive support from qualified residents with other free or subsidized energy improvement services. Three out of every four customers who worked with an energy advisor.



What Makes The Advisor Model Work?



Evaluation & Data Collection

- Approach utilities and other data partners as early as possible
- Ask customers about their program experience and for feedback on how your program can improve—and listen to their responses
- Develop data collection and evaluation plans in conjunction with program design
- Develop routine reports or dashboards to help monitor the collected data
- **Invest in information technology systems**
- Provide adequate time for data system development and testing
- Provide training to ensure data quality, consistency, and accuracy
- Use compatible formats for data sharing and reporting, and work with partners to implement standard data exchange protocols

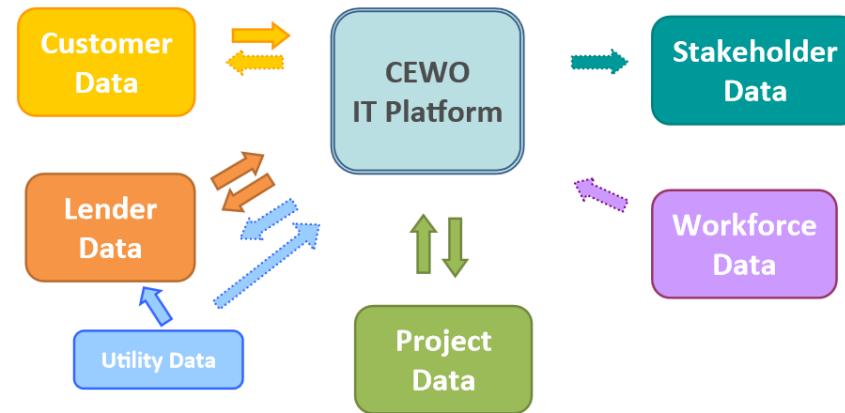
Lesson Learned: Data Collection

Invest in information technology systems

Paper-based or spreadsheet-based information collection processes can be low cost, but they become cumbersome to aggregate and store the data from many sources. Investing time and resources to thoughtfully plan a data collection, transfer, and storage system was well worth the effort.

- **Garfield Clean Energy** in Garfield County, Colorado, at first used a series of spreadsheets to track participants, their energy upgrade measures, and resulting energy savings. They realized that spreadsheets did not offer the level of sophistication needed for their work. They explored several online relationship management systems and selected one that could track building and energy data, energy savings, and energy deemed energy savings. The automation and data entry work, which took hours to create detailed reports based on a wide variety of reporting parameters, was significantly reduced.
- When **Clean Energy Works Oregon** (CEWO) scaled up their pilot program, a more robust solution was needed to meet the demands of funding agencies, media requests, and other stakeholders. CEWO worked with a software company to develop a unified system from application to completion. The software platform provides a unified interface for lenders, enabling each party to document progress through the CEWO process.
- In Boulder, Colorado, the **Energy Smart program** used spreadsheets to track program data. The program expanded under the Better Buildings Neighborhood Program to a user-friendly, real-time, cloud-based IT system for tracking customer information. This system allows for tracking of many metrics in a much more consistent, accurate manner. The system can be accessed in the field by EnergySmart Energy Advisors to capture baseline information, assessment findings for upgrade opportunities, rebates and financing received, and the supporting documentation. The new system in the field allows for much greater efficiency and accuracy.

CEWO Tracking & Reporting



The screenshot shows a web browser window displaying the 'YOUR PROJECT' dashboard on the Clean Energy Works Oregon website. The browser's address bar shows the URL <http://www.cleanenergyworksoregon.org/your-project/>. The website has a blue header with the 'clean energy works oregon' logo and navigation tabs for 'HOME', 'APPLY NOW', 'OUR BLOG', 'YOUR PROJECT', and 'OUR PROGRAM'. The main content area is titled 'YOUR PROJECT' and contains a 'WELCOME TO YOUR PROJECT DASHBOARD' section. This section includes a welcome message and instructions: 'Check back in the coming months to view and manage your project status. Your Project Dashboard notifies you of your next step, provides contractor and energy advisor contact information, and serves as your document archive - home to your critical paperwork, including your Home Energy Assessment report, your bid/cost estimate and your loan documents.' On the right side of the dashboard, there is a 'Coming Soon!' section with a list of features: 'Project Status', 'Next Step Notification', 'Contractor Contact Information', 'Energy Advisor Contact Information', and 'Project Document Archive'. A final line of text reads 'Get your Project Dashboard'.

Marketing & Outreach

- Adapt messages to your primary target audience's needs
- Communicate with audiences at least three times; one touch is not enough
- Conduct one-on-one outreach where people gather or at their own homes
- Consistently reinforce your program brand
- Follow through with customers
- Foster “word of mouth” communication from early adopters
- Language matters – use words that resonate with your target audience
- **Make upgrade benefits visible by showcasing completed projects and actual results**
- Motivate action through financial incentives and time-limited offers
- Partner with organizations or individuals that customers already trust
- Provide expertise and newsworthy stories to media outlets to garner earned media coverage

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Lesson Learned: Marketing & Outreach

Make upgrade benefits visible by showcasing completed projects and actual results

Unlike remodeling projects, home energy upgrade benefits are generally not visible. How upgrades work can help increase understanding and motivation with potential homeowners. Programs have successfully used house parties and demonstration homes to showcase the benefits of an upgrade entails. In some cases, the hosts of these events have been interested in allowing the program to leverage word-of-mouth marketing from trusted sources. Program administrators walk the attendees through a home energy assessment of the homeowner's home, which shows the benefits of the measures that have been installed.

- Through a one-year "house party" initiative, [Energy Impact Illinois](#) worked with neighborhood champions to host more than 650 house parties, which reached more than 3,000 Chicago homeowners, neighbors, and friends to see for themselves the benefits of energy efficiency upgrades can mean to a home. Each gathering included a home energy assessment demonstration on the homeowner's home, and the attendees to sign up for their own assessment or upgrade. Program administrators estimate that more than 900 house party participants completed upgrades in the [Focus Series interview with Energy Impact Illinois](#).
- The [California Center for Sustainable Energy](#), which manages a residential energy efficiency program in San Diego, partnered with municipalities to conduct [home tours](#), which successfully promoted both energy assessments and upgrades. During the tours, neighbors heard testimonials from demonstration homeowners, took a firsthand look at contractors' work, and met with the contractors who installed the upgrades, learned about available incentives, and completed an assessment of their own home. Between January 28 (when the initiative began) and February 28, 2012, 1,000 tour participants signed up for an energy assessment with a contractor.
- [NOLA WISE](#) (New Orleans, Louisiana, Worthwhile Investments Save Energy) organized and promoted the [NOLA Homeowner Showcases](#). NOLA WISE organized and promoted the [NOLA Homeowner Showcases](#), which showcased completed home energy upgrades. The NOLA Wise team and contractors walked through the homes and educate attendees on how to make their own homes more comfortable and energy efficient. Energy assessment requests in neighborhoods where these events were held increased significantly.



Focus Series

CHICAGO—ENERGY IMPACT ILLINOIS (EI2)

Energy Impact Illinois Learns That Parties Sell Upgrades

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

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

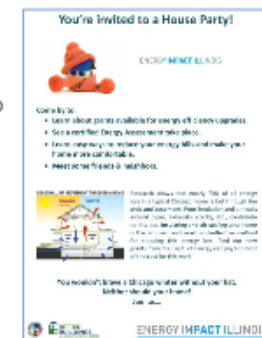
From the beginning of our program, we had always planned to have a comprehensive, tiered communications strategy that would begin with a mass media marketing effort followed by a community outreach component. After running our award-winning advertising campaign for several months, we saw a slight bump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

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

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

Which homeowners and homes were targeted?

Early in the EI2 program, we had conducted a market segmentation study and felt that the low-income energy efficiency group was already well covered in the region, so we focused on a higher income bracket. Households that we



Financing

- Consider tiered financing or rebates to encourage deeper upgrades
- Design your financing activities to enable long-term sustainability
- Engage with potential lending partners early and closely, and make a clear and specific business case for their involvement
- **Financing alone is not enough to increase demand – highlight financing as an effective tool, but “sell” homeowners on the benefits of upgrades**
- Hire staff with financing skills and knowledge
- Leverage financial sector marketing channels
- Make sure contractors understand the program’s financing options and benefits so they can communicate it to homeowners
- Promote existing loan products when possible before developing new ones
- Speak about financing in ways that resonate with homeowners
- Streamline the financing process with easy loan applications, quick approvals, and timely payments to contractors
- Tap into secondary market investors to provide lending capital

Lesson Learned: Financing

Financing alone is not enough to increase demand – highlight financing as an effective tool, but “sell” homeowners on the benefits of upgrades

Many programs quickly realize that access to low-cost financing for home energy upgrades. The primary barrier to energy efficiency adoption is often low customer demand for upgrades must first be sold on the benefits of home energy upgrades before they become interested. Program partners that achieved successes in loan volume promoted access to low-cost financing as a broader effort to sell homeowners on the benefits of energy efficiency. Approximately 15-20% of Better Buildings Neighborhood Programs adopted a loan product; some Better Buildings Neighborhood Program financing uptake by offering competitive interest rates and efficient loan approvals.

- When the Greater Cincinnati Energy Alliance (GCEA) began its program in 2011, there

We have loans to fit your needs

Whether you need to quickly replace outdated equipment or tend to your home's complex system, we have a loan to fit your needs.

Loan Features

- 3, 5, or 10 Year Loan Term**
- \$1,000 to \$20,000 Loan amounts**
- ENERGY STAR® Equipment**
- Fixed Monthly Payments**
- No Prepayment Penalty**

Improvement Specific Loan

Make targeted improvements such as replacing a furnace or insulating an attic.

9.99% APR **No Energy Assessment Required**

Whole Home Loan

Maximize your savings when you take a whole home approach.

6.99% APR **Energy Assessment Required**

[Learn more --](#)

Experience the benefits

- Adding Comfort by Stopping Drafts**
For many homeowners, it can be difficult to maintain a constant temperature throughout the home. Whether it is improving the cold room next to the garage in the winter, or the humid second floor during the warm summer months, the Energy Alliance can help.
- Energy Savings**
The Home Energy Assessment identifies where your home is wasting energy and provides a road map for energy savings, starting with those measures that have the highest impact per dollar.
- A Healthy, Safe Home**
Your Home Energy Assessment includes health and safety testing of your combustion appliances. These tests ensure your combustion appliances (such as furnaces, hot water heaters, and stoves) are functioning efficiently and not leaking harmful carbon monoxide or natural gas into your home.
- Improving Outdated Equipment**
Old, inefficient furnaces, air conditioners, and hot water heaters significantly add to a home's energy use. The Energy Alliance can work with you to replace outdated mechanical equipment with new high-performance models.
- Reducing Air Pollution**
During the hottest days of summer, our air conditioners work hard to help keep our homes cool. By using high-efficiency cooling systems, adding insulation, and eliminating drafts, you can retain the comfortable, conditioned air in your home. This puts less of a strain on our power grid and helps us all breathe a bit easier during the hottest and most humid months of the year.
- Green Jobs**
The Energy Alliance works with small businesses and workforce development agencies to train building professionals and create new jobs in the region. By making Cincinnati a leader in energy improvements, we can create a vibrant local green economy.

Contractor Engagement & Workforce Development

- **Contractors are your sales team – educate and empower them with the skills to market your program**
- Design a program that provides value for contractors and aligns with their business cycles
- Ensure that training programs focus on the skills that employers want and the community needs
- Establish a clear system and process for ensuring quality work
- Establish collaborative partnerships with contractors and communicate with them early and often
- Have clear rules and systems for identifying and remedying contractor problems
- Help contractors enter the home performance market by lowering barriers to entry and providing training, networking, and mentoring opportunities
- Provide information to help customers pick the right contractor
- Recognize and reward good contractor performance

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Lesson Learned: Workforce Development

Contractors are your sales team – educate and empower them with the skills to market your program

Contractors are your sales team – educate and empower them with the skills to market your program. Many home performance programs have confronted the challenge of turning high rates of customer interest into completed upgrades. Realizing that the challenge was not the program, some Better Buildings Neighborhood Program partners turned to contractors through co-marketing and sales training.

Programs have found that offering sales training to home performance professionals improves customer experience and conversion rates. In addition to offering sales training, co-marketing and co-branding with them to reach new homeowners. During the upgrade process, how to sell it using non-technical communications with homeowners, how to turn energy assessments into upgrades. Consider offering free or reduced-cost sales training resources to offer this training to contractor staff helps ensure that technical information and other incentives available to customers.

- [Efficiency Maine](#) boosted conversion rates with [sales training](#), which was used effectively. Through monthly webinars and professional development courses, contractors gained skills in targeted communication and selling program options, there by increasing Efficiency Maine's average monthly rate of energy upgrade conversions several months afterward.
- [Energy Upgrade California in Los Angeles County](#) provides marketing materials that contractors often do not have the time or experience to create in-house. Frequent newsletters and aspects of marketing. Because contractors had limited budgets, Energy Upgrade California's marketing center that contractors can use to print and deliver program marketing materials to home performance professionals, helped homeowners find qualified contractors for the program.



Workforce

Spotlight on Maine: Contractor Sales Training Boosts Energy Upgrade Conversions

Key Takeaways

- Make sure contractors have the skill sets they need, including sales and interpersonal skills, to help homeowners through the decision-making process
- Give contractors tools to learn homeowners' specific needs and determine their motivations when conducting assessments
- Support contractors directly or through other organizations to provide ongoing professional development



The Better Buildings Neighborhood Program is a U.S. Energy Department program that is improving lives and communities across the country through energy efficiency.

To learn how the Better Buildings Neighborhood Program is making homes more comfortable and businesses more successful and to read more from this Spotlight series, visit betterbuildings.energy.gov/neighborhoods.

When Efficiency Maine launched a new residential tiered rebate program in January 2010, offering homeowners thousands of dollars to complete a home energy upgrade, program staff expected a tremendous response. Initial interest in the offering was high, with the program receiving 10,000 leads through its call center and website, but by June 2010, contractors had only completed 72 upgrades. Following efforts to ensure that contractors were equipped with the tools and training necessary to close a sale with homeowners, Efficiency Maine's assessment-to-upgrade conversion rate grew from 10% to 60%.

Multiple approaches have assisted contractors in successfully selling home energy upgrades in Maine. Efficiency Maine has provided dedicated sales training, offers contractors a standard assessment checklist to help them communicate with homeowners, organizes monthly program webinars for contractors, and works with partners to continue offering professional development courses for contractors.

Tailor Sales Training to Fit Energy Professionals

In summer 2010, program managers began shadowing contractors on home visits in an effort to identify the source of the disconnect between leads and upgrades and, as a result, gained critical insight on why more homeowners were not upgrading their homes. The home performance contractors were focused on demonstrating their building science expertise, using technical language to describe energy efficiency issues they were finding in the home. Complex terminology often alienated homeowners, deterring them from undertaking upgrades and derailing the sales process. While program staff provided contractors with technical training, they realized that the contractors needed other training and tools to communicate effectively with homeowners.

In August 2010, Efficiency Maine decided to offer sales training to its participating contractors, as one approach to addressing its low conversion rates. The program conducted a nationwide search and selected Dale Carnegie Training, a professional skills training program with a strong presence in Maine. Recognizing that contractors did not want to think of themselves solely as salespeople, Efficiency Maine collaborated with Dale Carnegie Maine to customize its training model into a two-day course that blends selling

Contractors are the primary point of contact during the residential energy efficiency upgrade process. They not only need skills in building science, but also in communicating with consumers and selling program options.

Better Buildings Residential Program Solution Center

Overview
Framework
Examples
Next Steps

U.S. DEPARTMENT OF
ENERGY

Helping Programs & Their Partners

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

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BROWSE BY:
Program Components
Program Design Phases
Content Types

The Better Buildings Residential Program Solution Center is a repository for key lessons, resources, and knowledge related to residential energy efficiency upgrade programs. It is intended to help energy efficiency program teams and their partners plan, implement, manage, and evaluate residential energy upgrade programs.

Explore Program Components

Select a residential energy efficiency program component from the image below to access relevant content. Each component features an overview handbook with an introduction to the subject matter, in addition to topical handbooks with content about specific program stages and other key topics.

```
graph TD; A[Market Position & Business Model] --> B[Program Design & Customer Experience]; B --> C[Evaluation & Data Collection]; B --> D[Marketing & Outreach]; B --> E[Financing]; B --> F[Contractor Engagement & Workforce Development];
```

Look Across Program Design Phases

Select a residential energy efficiency program design phase from the image below to access handbooks relevant to that stage across all six program components.

```
graph LR; A[Strategy Development] --> B[Planning]; B --> C[Implementation]; C --> D[Evaluation];
```

RECENTLY UPDATED RESOURCES

- [Contractor Engagement & Workforce Development – Set Goals & Objectives](#)
- [Better Buildings Program Element Flowcharts](#)
- [Options for Raising Capital \(and Leveraging Public Funds\) for Residential Energy Loan Programs](#)
- [Trusted Partners: Everyday Energy Efficiency Across the South](#)
- [State Fact Sheets on Household Energy Use](#)

MOST POPULAR HANDBOOKS

- [Marketing & Outreach – Overview](#)
- [Market Position & Business Model – Overview](#)
- [Financing – Overview](#)
- [Program Design & Customer Experience – Overview](#)
- [Financing – Set Goals & Objectives](#)

Better Buildings
U.S. DEPARTMENT OF ENERGY

- Avoid starting from scratch
- Help programs and partners plan, operate, and evaluate their programs
- Provide living repository of the experiences of residential energy efficiency programs

Development Timeline

March - November 2012: Framework Development, Review, Consultation

Reviewed DOE guides, external literature, BBNP workshops and peer calls; vetted with stakeholders



June - July 2012: Feedback from Key Partners & Intended Users

Feedback from EE NGOs and programs, identified complementary work, REES conference input and ideas



July - October 2012: Drafted and Vetted Lessons Learned

Based on experience from 2 yrs of BBNP workshops and peer exchange calls, Now = Tips for Success



November 2012 - April 2013: Platform Development

Built platform, designed content format, developed selection of handbooks



April 2013 - April 2014: Content and Functionality Development (1st release)

All handbooks complete, additional Solution Center functionality developed



May 2014 – September 2014: 1st Release Available During Peer Review & Beta Testing

Tips for Success enhanced, content & function vetted by external peer reviewers; beta users test all aspects



Fall 2014: Public Launch (2nd release)

All content and functionality in place; ready for user submissions

Solution Center Development Team

Content Development

- Market Position & Business Model
 - Subid Wagley (DOE)
 - Athena Bertolino (Ross Strategic)
 - Rebecca Foster (Vermont Energy Investment Corporation)
- Program Design & Customer Experience
 - Megan Billingsley (Lawrence Berkeley National Laboratory)
 - Tom Beierle (Ross Strategic)
 - Richard Faesy (Energy Futures Group)
- Evaluation & Data Collection
 - Dale Hoffmeyer (DOE)
 - Stacy DeGabriele (Eastern Research Group, Inc. - ERG)
 - Nikki Kuhn (Vermont Energy Investment Corporation)
- Marketing & Outreach
 - Jonathan Cohen (DOE)
 - Kathleen Brady, Shannon Johnson (ERG)
- Financing
 - Steve Dunn (DOE)
 - Charlie Goff (ERG)
 - Matthew Brown, Dave Carey (Harcourt Brown & Carey)
- Contractor Engagement & Workforce Development
 - Megan Billingsley (Lawrence Berkeley National Laboratory)
 - Jennifer Tice, Darcy Peth (Ross Strategic)
 - Mike Rogers (OmStout Consulting)

Editors

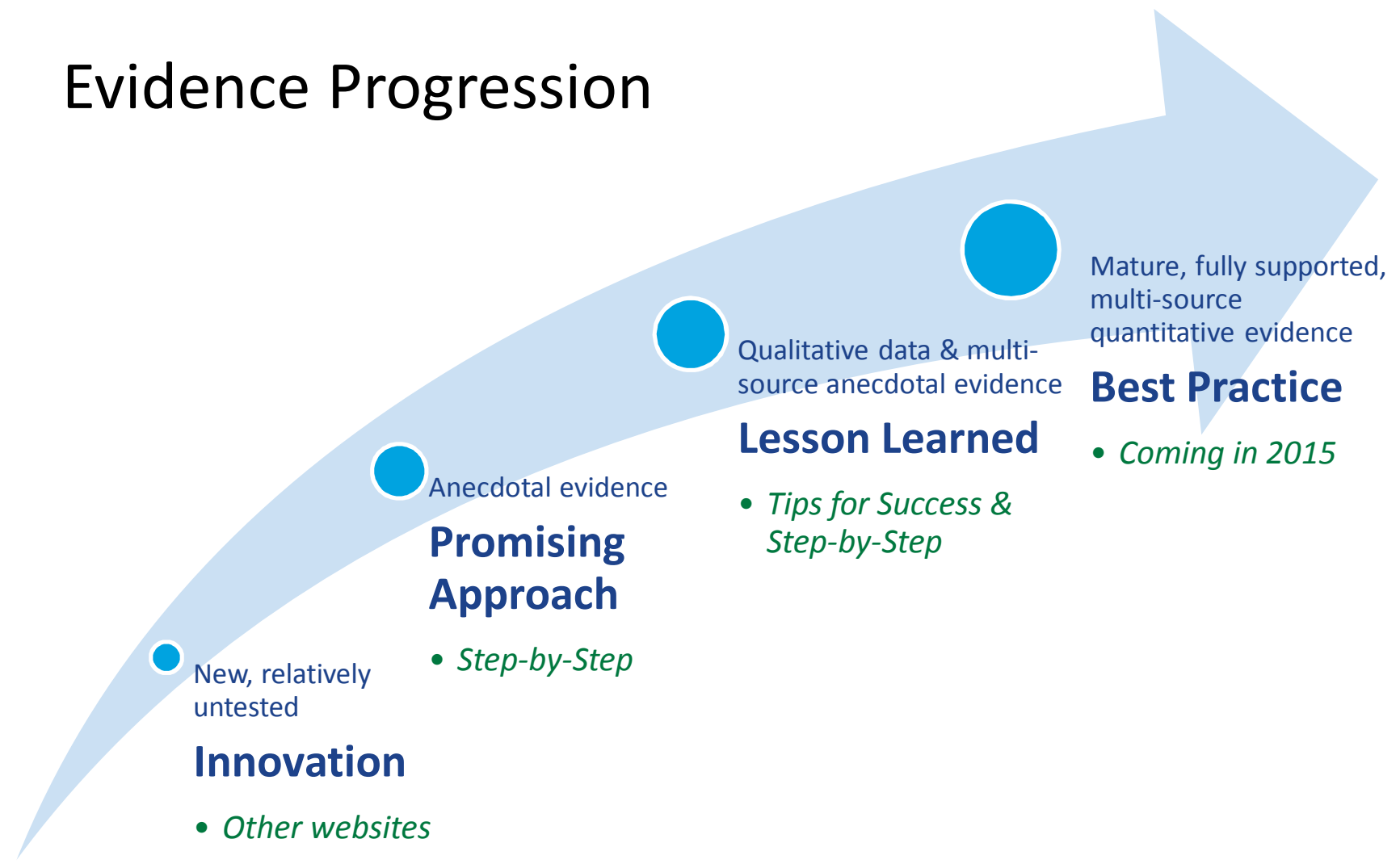
- David Lee (DOE)
- Danielle Sass Byrnett (DOE)
- Amanda Chiu (Energetics Incorporated)

Platform Development

- Chrissi Antonopoulos (Pacific Northwest National Laboratory - PNNL)
- Michael Baechler (PNNL)
- Linda Connell (PNNL)
- Julia Walker (PNNL)

Guidance and Examples Based on Evidence

Evidence Progression



What You Are About to See

- **Version 1 (beta) release**
- Contains ~95% of expected content
- Includes ~90% of features & functionality
- Allows users to review content, test the tool, and provide comments
- We welcome your feedback through this session or email: BBRPSolutionCenter@erg.com

Version 2 (full) release expected in Fall 2014

Better Buildings Residential Program
Solution Center
Framework

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BROWSE BY:

Program Components

Program Design Phases

Content Types

Center is a repository of examples, energy programs. It is intended to help generate, and evaluate their programs.

Handbooks

Market Position & Business Model

Program Design & Customer Experience

Evaluation & Data Collection

Marketing & Outreach

Financing

Contractor Engagement & Workforce Development

RECENTLY UPDATED RESOURCES

Program Design & Customer Experience – Deliver Program

Efficiency Maine Downloads and Forms Portal

New York State Energy Research and Development Authority (NYSERDA) Home Performance with ENERGY STAR Contractor Manual

EnergySmart Residential Survey (81 KB)

RePower Bainbridge Upgrade Survey (333 KB)

MOST POPULAR HANDBOOKS

Market Position & Business Model – Overview

Marketing & Outreach – Overview

Financing – Overview

Program Design & Customer Experience – Overview

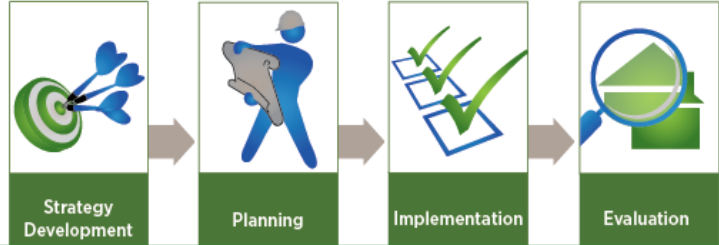
Market Position & Business Model – Assess the Market

ACKNOWLEDGEMENTS

The U.S. Department of Energy thanks the following individuals who conducted an expert review of the Better Buildings Residential Program Solution Center handbooks:

U.S. DEPARTMENT OF ENERGY

Explore Program Design Phase Resources






Content: Four Program Design Phases



Description: Why the stage is important and what user will learn

Contractor Engagement & Workforce Development – Overview

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Description Step-by-Step Tips for Success Examples Toolbox Topical Resources Quick Links

Description

Successful residential energy programs depend on strong relationships with contractors. Contractors employ home performance professionals who implement energy efficiency measures in homes. These contractors are the face of your program, and, therefore, critical partners in your success.

Recognize contractors' critical role and deliberately approach workforce development to maximize your program's impact. Benefits of effective contractor relationships, contractor support, and workforce development efforts include:

- Contractors that actively engage in your program and help meet your shared goals
- Efficient lead generation and sales efforts by contractors in line with their ability to deliver quality installations
- High conversion rates that reflect higher homeowner participation in your program
- High quality of home performance services provided to homeowners
- Homeowner confidence that energy savings and comfort improvements will be realized, due to effective quality assurance and communications
- Growth potential for contractors expanding in or entering the home performance market
- Good job opportunities for local, qualified home performance professionals.

Recruiting, developing, and maintaining enough contractors to work with your program requires ongoing effort. Leading programs engage

Key Resources

- [DOE Guidelines for Home Energy Professionals](#) include standard specifications for quality work, critical tasks and core competencies for effective training programs, and a framework for professional certifications. The website includes job task analyses that describe the tasks and skills needed for specific jobs, information about accredited training programs, downloadable training modules, and other resources.
- [DOE Building America Solution Center](#) provides home performance professionals with building science resources, integrated energy efficiency tools, case studies, and best practices designed to dramatically reduce energy use in new and existing homes. This website includes expert information on hundreds of high-performance design and construction topics, including air sealing and insulation, HVAC components, windows, indoor air quality, and more.

Handbooks – Step-by-Step

Step-by-Step: Detailed *what* and *how* information

Market Position & Business Model – Assess the Market

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To determine your organization's market position there are several important steps to consider.

[Expand All](#)

▶ Assess potential market demand for energy efficiency products and services

▶ Assess how the market is already being served by other organizations—and what gaps exist for your organization to fill

▶ Assess your strengths and capabilities to provide products and services in the market

▼ Assess potential market demand for energy efficiency products and services

As your organization enters the residential energy efficiency market or expands its existing role, make sure you have a solid understanding of current and potential market demand for such services. A variety of factors can influence demand. Examples include:

- Local, state, and regional policies (e.g., energy disclosure requirements, utility energy efficiency targets) that promote energy efficiency.
 - The [DSIRE database](#) provides comprehensive information on state, federal, local, and utility incentives and policies that are in place to support renewable energy and energy efficiency.
 - The U.S. Department of Energy's (DOE) 2007 report [State and Regional Policies That Promote Energy Efficiency Programs Carried Out by Electric and Gas Utilities](#) describes policies that could promote cost-effective programs, implemented by electric and natural gas utilities, to reduce energy consumption.
 - The [National Action Plan for Energy Efficiency](#) identifies key barriers limiting greater investment in cost-effective energy efficiency, describes policy recommendations to overcome the barriers, and documents policy and regulatory options for greater attention and investment in energy efficiency. The [State and Local Energy Efficiency Action Network](#) builds on the Action Plan by focusing on the assistance that states and local governments need to advance policies and practices that will bring energy efficiency to scale.

Handbooks – Tips for Success (1 of 2)

Tips: Lessons based on documented experience from multiple programs

Program Design & Customer Experience – Overview

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Tips for Success

In recent years, hundreds of communities have been working to promote home energy upgrades through programs such as the Better Buildings Neighborhood Program, Home Performance with ENERGY STAR, utility-sponsored programs, and others. The following tips present the top lessons these programs want to share related to this handbook. This list is not exhaustive.

Make upgrade options clear and concise for customers

- ▶ Keep the program simple for your customers
- ▶ Provide the customer with a single point of contact
- ▶ Make upgrade options clear and concise
- ▶ Keep the program simple for your contractors
- ▶ Emphasize the action you want your customers to take
- ▶ Measure and evaluate performance at key milestones

Programs in many regions of the U.S. find that the concept of home performance is new to homeowners. These homeowners typically have little idea how energy efficiency measures compare (e.g., energy savings benefits of insulation versus new windows) and they might not have heard about some effective measures, such as air sealing. Several programs have devised simple approaches to help customers understand the energy and cost savings and other benefits they will achieve from various types of measures, so homeowners can choose what is best for them. Recognize though that customers may have other priorities when considering an assessment's proposed measure (e.g., improving the look of their home with new windows, replacing an aging furnace before winter weather sets in).

- [Austin Energy](#) developed a form to estimate energy savings using a point system that contractors could use with residents during a home assessment. The form helped contractors and customers quickly determine which measures would achieve 15% energy savings in the home. Texas A&M's Energy Systems Laboratory validated the point system for the program to ensure its accuracy and integrity. The program found that this streamlined approach was appealing to customers and contractors.
- [Los Angeles County's Energy Upgrade California](#) implemented the [Flex Path program](#) that used a point system to show the energy savings from a menu of energy upgrade measures. To be eligible for program rebates, residents then selected which measures they would like to undertake that would total over 100 points and achieve 15% energy savings.

Video Content (2 of 2)

Description Step-by-Step **Tips for Success** Examples Toolbox Topical Resources

Tips for Success

In recent years, hundreds of communities have been working to promote home energy upgrades through programs such as the Better Buildings Neighborhood Program, Home Performance with ENERGY STAR, utility-sponsored programs, and others. The following tips present the top lessons these programs want to share related to this handbook. This list is not exhaustive.

[Expand All](#)

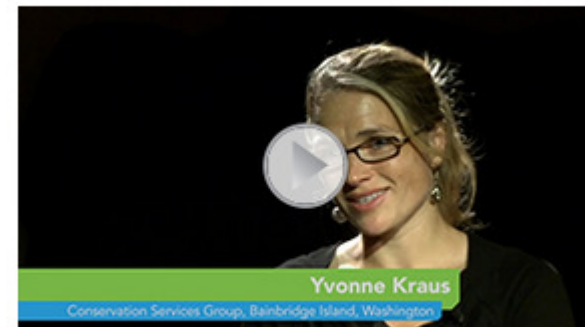
▼ **Adapt messages to your primary target audience's needs**

In Their Own Words: Benefits of Market Segmentation



Source: U.S. Department of Energy, 2012.

In Their Own Words: Messaging to Motivate



Source: U.S. Department of Energy, 2012.

Handbooks - Examples

Examples: Case studies, program presentations and reports, materials from individual energy upgrade programs

Financing – Communicate Impacts

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Service Delivery

Spotlight on Austin, Texas:
Best Offer Ever Produces
Upgrades in Record Time

Key Takeaways

- Use valuable, short-term promotion to jump-start program interest
- Build on existing energy efficiency efforts to launch quickly and learn for the next iteration
- Plan for contingencies and resolve your errors

“Getting on the landscape fast with some successes built positive momentum. There will be warts, so set reasonable expectations... but it is a great way to let people know you are on the scene.”

—Karl Rábago, Vice President, Austin Energy

Examples

The following resources are examples from individual residential energy efficiency program presentations and reports, and program materials. The U.S. Department of Energy

Case Studies

Spotlight on Austin, Texas: Best Offer Ever Produces Upgrades in Record Time

Author: U.S. Department of Energy
Publication Date: 2011

With its Best Offer Ever promotion, Austin Energy completed comprehensive energy upgrades in a record 564 homes in only six months--more than 10 times the utility's typical participation rate. To quickly develop momentum for BetterBuildings-Austin Energy's Clean Energy Accelerator program with homeowners, Austin Energy leveraged its existing Home Performance with ENERGY STAR® infrastructure, experience, and contractor base but added a comprehensive rebate/financing offer for a finite launch period. Demand soared, and due to thoughtful planning, Austin Energy and its contractors were able to keep up with requests for energy evaluations, inspections, improvements, and loan origination, while learning valuable lessons along the way.

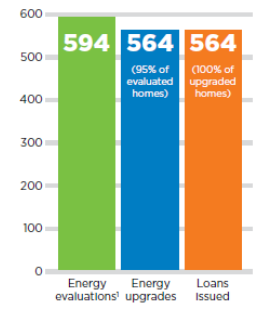
Using Credit Enhancements to Leverage Existing CDFI Capacity: Indianapolis

Author: Lawrence Berkeley National Laboratory
Publication Date: 2012

Highlights the EcoHouse Project Loan Program, which provides fixed interest rate financing for energy improvements among households that are otherwise unlikely to participate at market rates.

Figure 1. Best Offer Ever Promotion Results

Data reflect energy upgrades completed between October 1, 2010, and March 31, 2011, under the Best Offer Ever. The Best Offer Ever was only available to homeowners who signed up between October 1 and December 31, 2010.



594	564	564
Energy evaluations ¹	Energy upgrades <small>(95% of evaluated homes)</small>	Loans issued <small>(100% of upgraded homes)</small>

The Best Offer Ever presented customers who signed up for an energy upgrade between October 1 and December 31, 2010, with a significant financial incentive, resulting in 564 Home Performance with ENERGY STAR upgrades in six months. In the past, participants in Austin Energy's Home Performance with ENERGY STAR program received a free energy evaluation¹ but had to choose between a rebate or low-interest rate financing through a local credit union to complete the recommended upgrades.² By signing up during the promotion, participants could receive both the rebate and financing, for a combined value of approximately \$2,300 per household. Even with the sizable incentive, Austin Energy leveraged \$4.39 million in loans using \$700,000 of its Better Buildings seed funding to pay for the incentives and marketing to launch the promotion.

Handbooks – Topical Resources

Topical Resources: Presentations, publications, webcasts

Contractor Engagement & Workforce Development – Deliver Program

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Topical Resources

The following resources provide additional topical information related to this handbook, which include presentations, publications, and webcasts. Visit [Examples](#)  for materials from and about individual programs.


Topical Presentations

[The Contractor-Participation-Inducing Home Performance](#)

Author: Mike Rogers; OmStout Consulting; LLC

Publication Date: 2012

Presentation summarizing the important elements needed for successful performance programs.

[Five Steps to a Profitable Contractor Base](#)  

Author: Courtney Moriarta; SRA International; Inc.; Emily Building Performance Institute; Brad Geyer; Fayette County Department of Labor; Sam Flanery; Building Science Academy

Publication Date: 2012

Presentation on five steps to building a profitable contractor business (administration, certification and credentialing, commercial vs. trade), and training and sales support.

Five Steps to a Profitable Contractor Base

Session 2: Engaging Business Partners

*Residential Energy Efficiency Solutions:
From Innovation to Market Transformation*

Tuesday, July 10, 2012

Arlington, VA

Handbooks – Where Am I?

Where Am I: How the handbook fits into the Solution Center

Program Design & Customer Experience – Make Design Decisions

Where Am I?

Description

Successful energy efficiency programs address the opportunities, and challenges of their local markets. Programs likely to succeed aren't those that pick the program elements. Instead, you should develop a coordinated program with all the elements that are designed to overcome multiple market barriers. The greatest fit of your program to your local context is what makes your program is tailored to your specific market, your program is on:

- Your [market assessment](#), which identified needs in your market. Your program will be designed to seize the opportunities and overcome the barriers to adopting energy efficiency.
- Your [program goals and objectives](#), which define what your program seeks to achieve.
- Your [partners](#) who will help you deliver the program. Your understanding of local contractors and their capacity is critical to local utilities.

If your organization has a detailed [business plan](#) for your program design. If your organization does not have a business plan, you will make many of these types of planning decisions as you develop your program design. A business plan typically describes your organization's:

Program Design & Customer Experience – Make Design Decisions

Overview

Strategy Development

- Assess the Market
- Set Goals & Objectives
- Identify Partners
- Make Design Decisions

Planning

- Develop Implementation Plans
- Develop Evaluation Plans

Implementation

- Develop Resources
- Deliver Program

Evaluation

- Assess & Improve Processes
- Communicate Impacts

Market Position & Business Model

Program Design & Customer Experience

Evaluation & Data Collection

Marketing & Outreach

Financing

Contractor Engagement & Workforce Development

Strategy Development

Planning

Implementation

Evaluation

Handbooks – My Favorites

Better Buildings Residential Program Solution Center

EERE » BTQ » Better Buildings Neighborhood Program » Solution Center Home » Program Components » Marketing & Outreach

Solution Center Home
About
Handbook Index
Energy Data Facts
Glossary
BROWSE BY:
Program Components
Program Design Phases
Content Types

Marketing & Outreach – Deliver Program

[Where Am I?](#)

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Add a new Favorites Folder

Title *
Marketing & Outreach Materials
A short, descriptive title for this Favorites Folder. Limit to 255 characters.
Save

Finance Favorites
6 items
+ New Favorites Folder

Description

It is time to put all of your planning efforts to work on your program's marketing and outreach activities. A plan for your program should be in place before you develop your [outreach partners](#), [staffing and workflow](#), [outreach materials](#), and [evaluation plans](#).

You and your partners will want to be ready for sudden program interest that can be generated by new marketing efforts. This includes working with contractors, relevant program staff, and financing the influx of energy assessments, upgrade work, related applications.

Your program will use a variety of marketing and outreach to reach your [priority audiences](#). As soon as your marketing is underway, you should also begin to [track progress](#) and use tactics to identify what works well in your local market.

Marketing & Outreach

Pages:

- [Overview](#)
- [Assess the Market](#)
- [Set Goals & Objectives](#)
- [Identify Partners](#)
- [Make Design Decisions](#)

Handbooks – Quick Links

Quick Links: Access to pre-coded search results on key topics

Market Position & Business Model – Overview

[Where Am I?](#)



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The following list provides access to resources with more information on these key topics. Selecting a key topic will return a list of resources related to that topic. If you have suggestions for additional key topics, [please tell us](#)

- **Business Models for Providing Energy Efficiency Services**

Every organization or business has a particular set of motivations and revenue-generating opportunities that comprise their business model. Typical business models for providing energy efficiency services are documented for utility program administrators, remodelers, HVAC (heating, ventilation, and air conditioning) performance contractors, home inspectors, utilities, energy service providers, and home energy auditors.

- **Cost-Effectiveness Tests**

Cost-effectiveness tests compare the benefits of a utility or non-utility program with its associated costs. The five most common tests used by public utility/program administrators are the utility/program administrator cost test (PACT), the ratepayer impact measure test (RIM), the total resource cost test (TRC), and the societal cost test (SCT).

- **Non-Energy Benefits**

Energy efficiency programs provide identifiable benefits beyond energy savings, such as job creation, economic development, avoided emissions, and water savings. Quantifying these non-energy benefits may help program administrators demonstrate progress toward stated program and/or policy goals, or increase general awareness and support for program activities.

- **Policies and Regulations Impacting Energy Efficiency Programs**

Policies and regulations, such as energy efficiency targets, utility cost-effectiveness tests, financial regulations, and others, influence how your organization provides energy efficiency services.

**Future feature:
Clicking on a topic
name will provide
access to related
resources**

Better Buildings Residential Program
Solution Center
Examples

U.S. DEPARTMENT OF
ENERGY

Example #1 (1 of 5)

Our program needs contractors to perform upgrades. How do I identify and recruit contractors to develop a local workforce?

The screenshot shows the 'Contractor Engagement & Workforce Development – Overview' page. The left sidebar includes navigation links like 'Solution Center Home', 'About', and 'Handbook Index'. The main content area features a 'Description' section with text about the importance of contractor relationships and a list of benefits. A 'Key Resources' box on the right lists links like 'DOE Guidelines for Home Energy Professionals' and 'DOE Building America Solution Center'. A diagram at the bottom left, titled 'Look Across Program Design Phases', shows a flow from 'Market Position & Business Model' to 'Program Design & Customer Experience' to 'Evaluation & Data Collection', with 'Marketing & Outreach', 'Financing', and 'Contractor Engagement & Workforce Development' as supporting phases. A blue arrow points from the 'Contractor Engagement & Workforce Development' phase in the diagram to the 'Description' section of the page.

Contractor Engagement & Workforce Development – Overview

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Description Step-by-Step Tips for Success Examples Toolbox Topical Resources Quick Links

Description

Successful residential energy efficiency programs depend on strong relationships with contractors. Contractors employ home performance professionals who implement energy efficiency measures in homes. These contractors are the face of your program, and, therefore, are critical partners in your success.

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Recruiting, developing, and maintaining enough contractors to work with your program requires ongoing effort. Leading

Key Resources

- [DOE Guidelines for Home Energy Professionals](#) include standard specifications for quality work, critical tasks and core competencies for effective training programs, and a framework for professional certifications. The website includes job task analyses that describe the tasks and skills needed for specific jobs, information about accredited training programs, downloadable training modules, and other resources.
- [DOE Building America Solution Center](#) provides home performance professionals with building science resources, integrated energy efficiency tools, case studies, and best practices designed to dramatically reduce energy use in new and existing homes. This website includes expert information on hundreds of high-performance design and construction topics, including air sealing and insulation, HVAC components, windows, indoor air quality, and more.

Look Across Program Design Phases

Example #1: Contractor Engagement Overview (2 of 5)

Contractor Engagement & Workforce Development – Overview

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Description Step-by-Step Tips for Success Examples Toolbox Topical Resources Quick Links

Step-By-Step

The following steps list important activities for Contractor Engagement & Workforce Development. Each step has a handbook that you need to take into account the unique needs of your program. Click on each step to access its handbook.

1. [Assess the Market](#) *Assess the quantity and capacity of available contractors and the skills of the local workforce.*
2. [Set Goals & Objectives](#) *Establish or refine specific workforce and contractor goals.*
3. [Identify Partners](#) *Establish relationships with contractors and training providers.*
4. [Make Design Decisions](#) *Decide on strategies for training, workforce development, and contractor recruitment.*
5. [Develop Implementation Plans](#) *Develop workforce development, contractor recruitment, and training plans.*
6. [Develop Evaluation Plans](#) *Develop a workforce quality assurance and evaluation plan.*
7. [Develop Resources](#) *Develop workforce and contractor engagement resources.*
8. [Deliver Program](#) *Implement contractor coordination and workforce development.*
9. [Assess & Improve Processes](#) *Monitor the effectiveness of workforce efforts, motivate continuous improvement, address low performers, and adapt as needed.*
10. [Communicate Impacts](#) *Communicate program results to workforce stakeholders and contractor partners.*

Contractor Engagement & Workforce Development – Identify Partners

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Description Step-by-Step Tips for Success Examples Toolbox Topical Resources

Description

A critical ingredient for your program's success is frequent engagement with contractors, initiated early and often. Your program may also want to work with training providers and local employment organizations to develop the skills of the local workforce and help connect those workers with jobs.

Your partners will include:

- Contractors that will become your most important service delivery partners
- Trade associations and economic development institutions that can help you promote your program to contractors and recruit them
- Training partners that can help you increase the number of trained and certified technicians in your workforce.

Your local [market assessment](#) revealed the many types of contractors you can partner with, including home performance contractors, HVAC contractors, insulation contractors, remodelers, and others. You also surveyed the range of local training and employment organizations that can help enhance the skills and qualifications of the local home performance workforce.

This handbook provides information and tools to help you:

- Assess potential contractor partners
- Develop strategies for contractor recruitment
- Establish ongoing relationships with contractors

Contractor Engagement & Workforce Development


Stages:


1. [Overview](#)
2. [Assess the Market](#)
3. [Set Goals & Objectives](#)
4. [Identify Partners](#)
5. [Make Design Decisions](#)
6. [Develop Implementation Plans](#)
7. [Develop Evaluation Plans](#)
8. [Develop Resources](#)
9. [Deliver Program](#)
10. [Assess & Improve Processes](#)
11. [Communicate Impacts](#)


Example #1: Step-by-Step (3 of 5)

Contractor Engagement & Workforce Development – Identify Partners

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Step-By-Step

Partnerships can broaden the reach of your relationships with contractors and establish effective partnerships.

Assess potential contractor participation

▶ Develop strategies for contractor recruitment

▶ Establish ongoing relationships

▶ Engage and recruit workforce



▶ Evaluate potential workforce

▶ Establish partnership agreements

Develop strategies for contractor recruitment

Recruiting and sustaining contractor participation in programs generally requires ongoing effort. Effective contractor recruitment strategies:

- Are built upon good program designs that minimize administrative requirements, while still maintaining quality standards
- Establish a relationship between the program and the contractor
- Focus on the benefits of the program to the contractor and how they outweigh the costs of participation
- Help the contractor advance to the next stage of participation in the program, such as completing training/orientation or signing a participation agreement.

Your recruitment strategy should include identifying contractors, enticing them to participate, and continually supporting their participation in your program. As discussed when you [learned about contractors in your market](#) , canvas existing energy programs as well as local home performance contractors, HVAC contractors, and trade associations to identify contractors you might encourage to participate in your program. Consult online directories to find certified home performance professionals in your community. For guidance and resources on reaching out to contractors, including online contractor directories, see the [market assessment handbook](#) .

Example #1: Tips for Success (4 of 5)

Contractor Engagement & Workforce Development – Identify Partners

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Description

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Tips for Success

In recent years, hundreds of communities across the country have joined the Better Buildings Neighborhood Program. The following tips present the top lessons learned from these communities.

▶ Design a program that provides training, networking, and mentoring opportunities

▶ Establish collaborative partnerships with local industry and community organizations

▶ Help contractors enter the home performance market by lowering barriers to entry and providing training, networking, and mentoring opportunities

▶ Help contractors enter the home performance market by lowering barriers to entry and providing training, networking, and mentoring opportunities

Entering a new market adds risk to contractors' businesses. As several Better Buildings Neighborhood Program partners focused on their efforts to attract contractors, they realized that it would be valuable for them to help contractors enter the home performance market. Many programs took steps to lower or eliminate unnecessary hurdles or barriers to contractors' successful entry into the market. These barriers included long delays to receive payment for the program, paperwork burdens that were sometimes excessive enough to make contractors reluctant to participate, and program expectations that were unclear to contractors. Programs have also used equipment loan programs, subsidized training, and other strategies to lower the upfront costs of entering the home performance market.

To help contractors learn the trade and enter the home performance market, many programs have offered training and mentoring. Taking steps to help contractors enter the home performance market can help you establish a trained workforce of high-quality contractors to support home performance work.

- [Fayette County, Pennsylvania](#) helped [contractors enter the market](#) by providing grants and financing to minimize startup costs, and by giving contractors the opportunity to provide Building Performance Institute (BPI) certification to their technicians. The program partnered with a local private industry council to train technicians to become BPI certified at no cost to students. The partnership program helped new home performance professionals start new businesses, for example, by providing grants and low-interest loans to purchase computer software and professional equipment. Training and certification in the home performance industry provides Fayette County residents with an opportunity for stable and well-paying careers.
- New Hampshire's [Beacon Communities Project](#) sought to reinvigorate the local economy of Berlin, New Hampshire, following the 2006 closure of a pulp mill. The program began working with local community colleges to provide BPI-certified training to develop more qualified home performance professionals. The program supplemented the training with mentoring opportunities for students who completed classroom trainings but needed more experience in the field before being hired by a contractor or starting their own company. In the nearly three years since the program's launch in September 2013, 42 students had been trained through these classes and mentorships. These trained students helped the program offer quality home performance upgrades to homeowners, and the mentorship is helping students become qualified home performance professionals.

Example #1: Toolbox (5 of 5)

Contractor Engagement & Workforce Development – Identify Partners

Where Am I?



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Description

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Toolbox

The following resources are available to help design, implement, and evaluate these resources. These resources include templates and forms, as well as tools to endorse these materials.

Templates & Forms

[Efficiency Maine Residential Registered Vendor Agreement Form](#)

Author: Efficiency Maine

Publication Date: 2014

A short, checklist-style form that contractors complete to verify whether they meet basic program qualifications, and describe other information about their business.

Tools & Calculators

[Green for All Energy Efficiency Toolkit](#)

Author: Green For All

Publication Date: 2012

This practitioner-focused Toolkit for Residential Energy Efficiency helps new, established, and future energy efficiency practitioners assist new, established, and future energy efficiency practitioners with the promise of the green economy. It is intended as a practical program manager can deploy to implement a variety of energy efficiency programs, summary documents, RFPs, contracts, and other program materials. Nationwide have used to create their own efficiency programs.



Residential Registered Vendor Agreement Form

To be listed as a Registered Vendor on the [Efficiency Maine website](#), please complete this form, sign it and submit it with the appropriate documentation.

Section 1: Registered Vendor Information. Please enter information you would like to appear on the website.

Business Name		Phone Number	
Street Address		Fax Number	
City, State, Zip		Business Email	
Contact Name		Website	

Section 2: Basic Requirements. Please include the following documentation when submitting agreement form.

<input checked="" type="checkbox"/>	Required Documentation
<input type="checkbox"/>	Code of Conduct: http://www.efficiencymaine.com/docs/EMCode-of-Conduct.pdf
<input type="checkbox"/>	General Commercial or Professional Liability Insurance (Minimum coverage: \$500,000)
<input type="checkbox"/>	Workers Compensation Insurance (Minimum coverage: \$500,000) <i>Please Note: A Sole Proprietor without employees is not required to have Workers Compensation coverage. Similarly, a Limited Liability Corporation without employees is not required to have Workers Compensation coverage for the owners. If your business is exempt from this requirement, please write "NA" in the checkbox to the left.</i>

Section 3: Service Offerings and Qualifications. To have the following services reflected on the [Efficiency Maine Locator](#), please check the rows that apply and **SUBMIT DOCUMENTATION OF APPLICABLE QUALIFICATION(S)**:

<input checked="" type="checkbox"/>	Service Offering	Qualification(s)*
<input type="checkbox"/>	Energy Advisor	Building Performance Institute (BPI) Building Analyst AND Maine Limited Energy Auditor Technician (LEAT) license
<input type="checkbox"/>	Air Sealing and Assessment	Building Performance Institute (BPI) Building Analyst AND Maine Limited Energy Auditor Technician (LEAT) license
<input type="checkbox"/>	Insulation	Insulation installation training
<input type="checkbox"/>	Heat Pumps	Environmental Protection Agency (EPA) Section 608 Refrigerant Handling Certification AND installation training within the last two years by a manufacturer of ENERGY STAR heat pumps
<input type="checkbox"/>	Gas	Maine Fuel Board License (Master or Journeyman, Propane and Natural Gas Technician)
<input type="checkbox"/>	Oil	Maine Fuel Board License (Master or Journeyman, Oil and Solid Fuel Technician)

Example #2 (1 of 4)

Our program is starting soon, and we need to research what the market for energy efficiency looks like in our community. What should I do to understand the market?

Better Buildings Residential Program Solution Center

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

Solution Center Home The Better Buildings Residential Program Solution Center is a repository of examples, lessons, and resources for residential energy efficiency programs. It is intended to help program administrators and their partners plan, operate, and evaluate their programs.

Access Program Component Handbooks

Market Position & Business Model → Program Design & Customer Experience → Evaluation & Data Collection

Marketing & Outreach → Financing → Contractor Engagement & Workforce Development

Explore Program Design Phase Resources

Strategy Development → Planning → Implementation → Evaluation

MY FAVORITES

- Finance Favorites (6 items)
- Marketing & Outreach Favorites (1 item)
- New Favorites Folder

RECENTLY UPDATED RESOURCES

- Program Design & Customer Experience – Deliver Program
- Efficiency Maine Downloads and Forms Portal
- New York State Energy Research and Development Authority (NYSERDA) Home Performance with ENERGY STAR Contractor Manual
- EnergySmart Residential Survey (81 KB)
- RePower Bainbridge Upgrade Survey (333 KB)

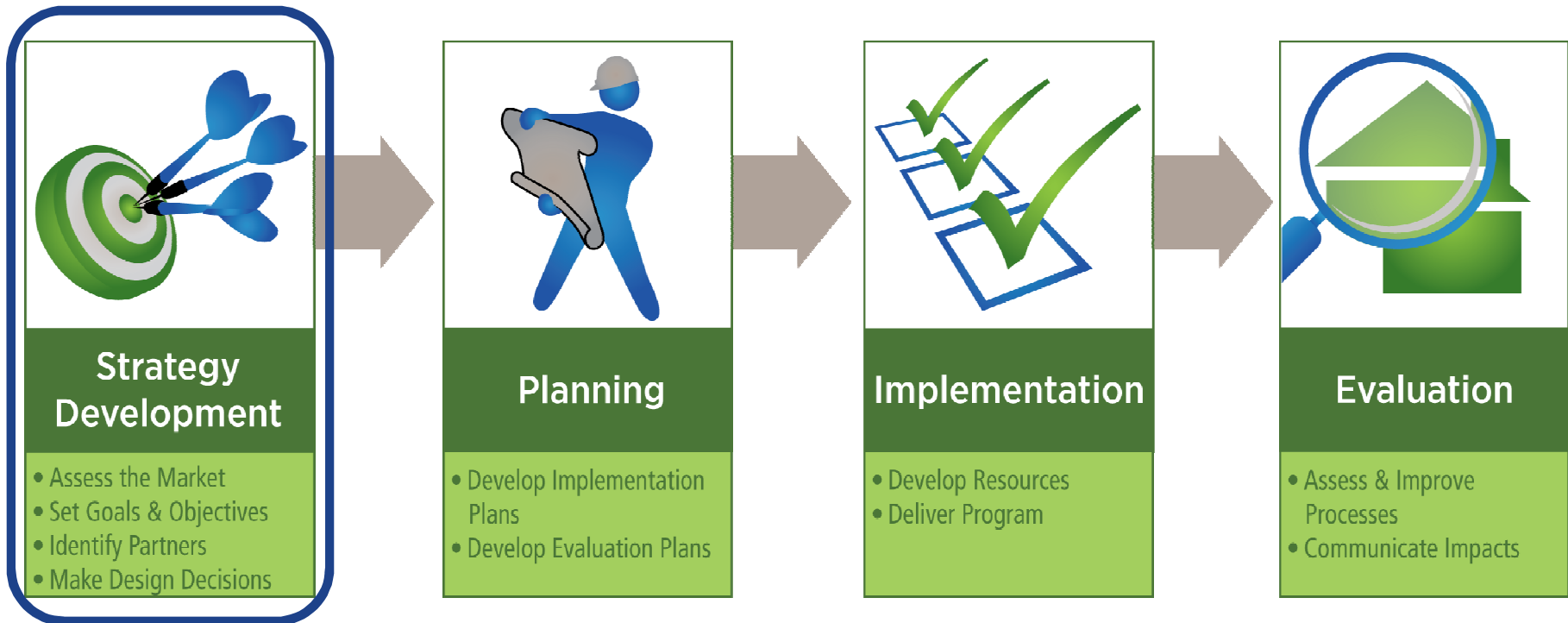
MOST POPULAR HANDBOOKS

- Market Position & Business Model – Overview
- Marketing & Outreach – Overview
- Financing – Overview
- Program Design & Customer Experience – Overview
- Market Position & Business Model – Assess the Market

ACKNOWLEDGEMENTS

The U.S. Department of Energy thanks the following individuals who conducted an expert review of the Better Buildings Residential Program Solution Center handbooks:

Example #2: Program Design Phase (2 of 4)



Example #2: Strategy Development (3 of 4)

Better Buildings Residential Program Solution Center

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BROWSE BY:


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Financing – Assess the Market 
Determine how your target audience currently funds energy efficiency services, to what extent upfront cost is a barrier, and whether improvements to their financing options would increase the uptake of energy efficiency measures.

Marketing & Outreach – Assess the Market 
Identify and prioritize potential target audiences based on their likely receptivity to your program's services.

Contractor Engagement & Workforce Development – Assess the Market 
Learn about the capabilities and services of existing contractors and training providers working in your market.

Program Design & Customer Experience – Assess the Market 
Research and analyze the specific barriers, needs, and opportunities for a residential energy efficiency program in your community.

Market Position & Business Model – Assess the Market 
Survey existing and potential demand for energy efficiency products and services based on an understanding of policies, housing and energy characteristics, demographics, related initiatives and other market actors.

CURRENT SEARCH

Search found 13 items
"assess the market"
[\(-\) Strategy Development](#)

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FILTER BY CONTENT TYPE:
[Handbook \(13\)](#)

FILTER BY PROGRAM COMPONENT:
[Market Position & Business Model \(4\)](#)
[Program Design & Customer Experience \(2\)](#)
[Marketing & Outreach \(3\)](#)
[Financing \(2\)](#)
[Contractor Engagement & Workforce Development \(2\)](#)

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Example #2: Handbooks (4 of 4)

Market Position & Business Model – Assess the Market

Where Am I? [Subscribe](#) [PDF version](#) [Print this page](#)

[Description](#) [Step-by-Step](#) [Tips for Success](#) [Examples](#) [Toolbox](#) [Topical Resources](#)

Description

This handbook will help you assess what kind of energy efficiency activities and actors (e.g., home performance contractors, HVAC contractors, remodelers, retailers, utilities, lenders, and homeowners) currently exist in your community and the level of interest in new energy efficiency efforts. Using this information, this handbook will ultimately help you understand the role your organization can play in filling current or future demand for energy efficiency upgrades in your target market.

You will first learn how to assess the nature of current and potential demand for energy efficiency products and services (e.g., home assessments, energy efficiency upgrades, loans or products to finance upgrades, contractor training) in your community and what factors can influence this demand. You will then be provided with tools for determining how the market is already being served by other organizations and where your organization could provide value in delivering energy efficiency services. To round out your market assessment, you will learn how to identify your organization's strengths, capabilities, and constraints in providing needed products and services. You will also learn how to use that information to determine the next steps for your organization as you undertake a residential energy efficiency program.

A thorough market assessment—giving careful consideration to trends, opportunities, gaps, and barriers—will help you determine if you should enter the market and if so, how to develop a business model that yields economic, environmental, and energy benefits for your community. If your organization decides to enter the energy efficiency market or significantly change its role in the market, you will want to undertake a more detailed market assessment to inform your program design and strategy (see the handbooks below for more information).

Find related information across other program components:

- [Program Design & Customer Experience – Assess the Market](#) *Research and analyze the specific barriers, needs, and opportunities for a residential energy efficiency program in your community.*
- [Marketing & Outreach – Assess the Market](#) *Identify and prioritize potential target audiences based on their receptivity to energy efficiency services.*
- [Financing – Assess the Market](#) *Determine how your target audience currently funds energy efficiency services, to what extent upfront cost is a barrier, and whether improvements to their financing options would increase the uptake of energy efficiency measures.*
- [Contractor Engagement & Workforce Development – Assess the Market](#) *Learn about the capabilities and services of existing contractors and training providers working in your market.*

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Access Step-by-Step, Tips, and resources

General description of how to assess what kind of energy efficiency activities and actors exist in your community

Access related information across all program components

Example #4 (1 of 4)

I need to explore options for setting up a quality assurance program. Where do you talk about that?

BBNP Search

Enter your keywords
quality assurance

Search

Search results

[NYSERDA Quality Assurance Procedures](#) (310 KB)
Author: New York State Energy Research and Development Authority
Publication Date: 2012
This section of NYSERDA's Home Performance Contractor Resource Guide describes quality control procedures for initial review, field inspection, and administrative review of projects. Supporting worksheets are available to assist with compliance and verification.

[Quality Assurance and Enduring High Quality Work](#)
Author: U.S. Environmental Protection Agency
Publication Date: 2011
Overview of quality assurance guidelines for Home Performance with ENERGY STAR.

[Data Driven Quality Assurance & Quality Control](#)
Author: Patrick Roche; Conservation Services Group
Publication Date: 2012
Presentation describing how Conservation Services Group uses data to monitor market transformation and for internal QA/QC purposes.

[Job Quality, Equitable Access and Quality Assurance Standards in Leading Residential Weatherization Programs](#)
Author: Community Benefits Law Center
Publication Date: 2010
Summary of the standards that support job quality, equitable access and quality assurance in several residential energy efficiency programs from different parts of the country.

CURRENT SEARCH

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quality assurance
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FILTER BY CONTENT TYPE:

- [Handbook \(5\)](#)
- [Tips for Success \(5\)](#)
- [Program Materials \(2\)](#)
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- [Topical Presentations \(2\)](#)
- [Webcast \(1\)](#)

FILTER BY PROGRAM COMPONENT:

- [Program Design & Customer Experience \(4\)](#)
- [Evaluation & Data Collection \(3\)](#)
- [Financing \(3\)](#)
- [Contractor Engagement & Workforce Development \(10\)](#)

FILTER BY PROGRAM DESIGN PHASE:

- [Overview \(4\)](#)
- [Strategy Development \(9\)](#)
- [Planning \(7\)](#)
- [Implementation \(8\)](#)
- [Evaluation \(6\)](#)

FILTER BY STATE OR TERRITORY:

Use filters to further refine results


Example #4: Filter for Handbooks (2 of 4)


BBNP Search


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quality assurance


Search

Search results

[Contractor Engagement & Workforce Development – Overview](#) 
Support and partner with the workforce who will deliver your program's energy efficiency services by understanding their capacity, recruiting contractor partners, enabling technical training and business development support, fostering clear communication, and refining program processes over time, in partnership with your workforce.

[Contractor Engagement & Workforce Development – Make Design Decisions](#) 
Solidify your program strategy and decide which customers you will focus on; what products, services, and support you will provide; and how you will partner with contractors and others to deliver services to your customers.

[Evaluation & Data Collection – Overview](#) 
Develop evidence-based insights into your program's performance through third-party process and impact evaluations. Learn how to develop effective data collection strategies and timely evaluations to identify important program achievements as well as opportunities for making program improvements.

[Program Design & Customer Experience – Identify Partners](#) 
Establish relationships with organizations that can help deliver your program by enhancing your knowledge, resources, capabilities and access to customers and contractors.

CURRENT SEARCH

Search found 4 items
quality assurance
[Handbook](#)

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FILTER BY CONTENT TYPE:

[Handbook](#)

FILTER BY PROGRAM COMPONENT:

[Program Design & Customer Experience \(1\)](#)
[Evaluation & Data Collection \(1\)](#)
[Contractor Engagement & Workforce Development \(2\)](#)

FILTER BY PROGRAM DESIGN PHASE:

[Overview \(2\)](#)
[Strategy Development \(2\)](#)

Example #4: Filter for Webcasts (3 of 4)

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quality assurance

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Quality Assurance for Residential Retrofit Programs
[Presentation](#), [Media](#), [Transcript](#)
Author: Jim Grevatt, Vermont Energy Investment Corporation
Publication Date: 2010
Webcast about quality assurance for residential upgrade programs.

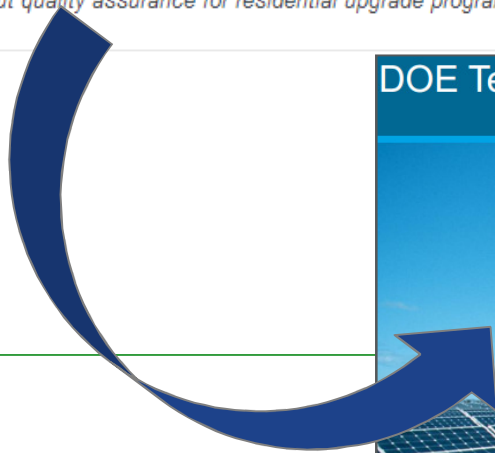
CURRENT SEARCH

Search found 1 item
quality assurance
[Webcast](#)

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FILTER BY CONTENT TYPE:

[Webcast](#)



DOE Technical Assistance Program

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

The Parker Ranch installation in Hawaii

Quality Assurance for Residential Retrofit Programs
October 26, 2010

Jim Grevatt
Vermont Energy Investment Corporation
DOE Technical Assistance Program
Team 4 – Program & Project Development & Implementation

Example #4: Filter for Publications (4 of 4)

Enter your keywords

quality assurance

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[Quality Assurance and Enduring High Quality Work](#)

Author: Home Performance with Energy Star

Publication Date: 2011

Overview of quality assurance guidelines for Home Performance with ENERGY STAR.

[Job Quality, Equitable Access and Quality Assurance Standards in Leading Residential Weatherization Programs](#)

Author: Community Benefits Law Center

Publication Date: 2010

Summary of the standards that support job quality, equitable access and quality assurance in several residential energy efficiency programs from different parts of the country.

[Quality Assurance Best Practices: Home Energy Performance with ENERGY STAR Programs](#)

Author: U.S. Department of Energy

Publication Date: 2011

This publication lists quality assurance best practices on how to create a quality assurance plan and the components that these plans should include.



Quality Assurance Best Practices

Quality Assurance Best Practices: Home Performance with ENERGY STAR Programs

While the EPA's Home Performance with ENERGY STAR is not the only whole house retrofit program in operation, it offers a set of standard guidelines and best practices for Quality Assurance (QA) that should be utilized in starting any new or updating existing home retrofit programs.

In order to sponsor a Home Performance with ENERGY STAR program, organizations must submit an implementation plan which includes Quality Assurance protocols. In order to meet ENERGY STAR requirements, QA plans must explain how the program will ensure participating contractors will meet program standards. QA plans must explain:

- **Contractor company and staff qualification requirements** intended to ensure that qualified building scientists are assessing the home and are capable of protecting the brand promise of ENERGY STAR. These capabilities include:
 - Contractor staff understand how to represent the program and their participation in it
 - Contractor staff understand the energy efficiency strategies applicable for residential retrofits
 - Contractor staff can protect the health and safety of occupants when installing energy efficiency measures
 - Contractor companies have proper licenses, insurance, etc.
 - Contractor companies sign participation agreements that outline proper conduct and program requirements
- **Reporting process** that requires participating contractors to report jobs that are promoted to homeowners and performed under the HPwES logo.
 - Some – but not all – programs want to pre-approve jobs prior to commencement. However, this pre-approval tends to slow down jobs and can potentially reduce the audit-to-retrofit conversion rate.
 - Compliance with program requirements and industry standards (see below)
- **Job report review process** that ensures program compliance and provides for follow-up with the contractor when necessary
 - Reporting of jobs (aka "file checks") serve multiple purposes:
 - Rebate processing (i.e., eligibility of installed measures)
 - Sufficient data to have some reasonable assurance that measures will save energy
 - Confirmation that health & safety measures were being followed
 - Combustion safety – draft test, Combustion Appliance Zone (CAZ) tests
 - Ventilation – ASHRAE compliance
 - Lead safe practices
 - Other (moisture, asbestos, etc.)
 - Data that could be used to inform an on-site QA visit
 - Opportunity to mentor contractors

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Program Components

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Content Types

Center is a repository of examples, energy programs. It is intended to help generate, and evaluate their programs.

Browse by Program Components

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

Explore Program Design Phase Resources

- Strategy Development
- Planning
- Implementation
- Evaluation

MY FAVORITES

- Finance Favorites (6 items)
- Marketing & Outreach Favorites (1 item)
- New Favorites Folder

RECENTLY UPDATED RESOURCES

- Program Design & Customer Experience – Deliver Program
- Efficiency Maine Downloads and Forms Portal
- New York State Energy Research and Development Authority (NYSERDA) Home Performance with ENERGY STAR Contractor Manual
- EnergySmart Residential Survey (81 KB)
- RePower Bainbridge Upgrade Survey (333 KB)

MOST POPULAR HANDBOOKS

- Market Position & Business Model – Overview
- Marketing & Outreach – Overview
- Financing – Overview
- Program Design & Customer Experience – Overview
- Market Position & Business Model – Assess the Market

ACKNOWLEDGEMENTS

The U.S. Department of Energy thanks the following individuals who conducted an expert review of the Better Buildings Residential Program Solution Center handbooks:

- Search
- My Favorites
- Recent Content
- Popular Handbooks

Better Buildings Residential Program
Solution Center
Next Steps

U.S. DEPARTMENT OF
ENERGY

Summer 2014: Peer Review & Beta Use

- Peer reviewers will comment on technical validity, market relevance, and framing
- Beta User access:
 - <https://bbnp.pnnl.gov/>
 - Username: betauser
 - Password: bbrpsc
- Create a user account to customize experience
- Get involved!
 - Log in now to become a beta user or email: BBRPSolutionCenter@erg.com
- Full public launch in October/November

Better Buildings Residential Network

Join the Better Buildings Residential Network

Connects energy efficiency programs and partners to share best practices to increase the number of homes that are energy efficient.

Benefits:

- Regular peer exchange calls (Marketing, Financing, Workforce, Program Sustainability, Data, Low Income, Multifamily, other)
- Newsletter updates on trends
- Tools, templates, & resources
- Optional program benchmarking
- Online community hosted on Home Energy Pros
- Recognition in media, materials

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

Learn More & Join: www.betterbuildings.energy.gov/bbrn

Inaugural Members



Austin Energy



Boulder County



Local Energy Alliance Program



Mountain Association for Community Economic Development (MACED)

New York State Energy Research & Development Authority

Home Energy Pros Online Group

HOME ENERGY PROS Connecting home energy professionals

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All Groups My Groups Options Invite Jonathan Cohen

Better Buildings Residential Network
Created by Better Buildings Support
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Information

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

Better Buildings
U.S. DEPARTMENT OF ENERGY

Website: <http://betterbuildings.energy.gov/bbrn>
Members: 76
Latest Activity: 4 hours ago

Send Message to Group
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Members (76)

Home Energy Pros

Home Energy Pros was founded by the developers of Home Energy Saver Pro (sponsored by the U.S. Department of Energy,) and brought to you in partnership with Home Energy magazine.

Latest Activity

What brings you here?

140 Share +

+ 3 new items

Brennan Less replied to Kaushal Bharath Raju's discussion On the Question

Main Room Members Online (8) 100%

Programming: Upcoming Peer Exchange Calls

Date/Time	Group	Topic
June 26, 3:00-4:30 ET	Program Sustainability	Stakeholder Mapping: How to Identify Leaders, Target Audiences, and Gaps in Outreach
July 10, 3:00-4:30 ET	Marketing & Outreach	Incorporating Behavior Change Efforts into Energy Efficiency Programs
July 24, 12:30-2:00 ET	Data & Evaluation	Cost-Effective, Customer-Focused and Contractor-Focused Data Tracking Systems
July 24, 3:00-4:30 ET	Financing & Revenue	Effective Loan Program Design and Integration with Contractors

More Information

www.energy.gov/eere/better-buildings-residential

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Registration for July 9th Data Webcast
Questions or comments about Solution Center, etc.
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