

Marketing & Outreach – Deliver Program

Description

It is time to put all of your planning efforts to work by launching your program’s marketing and outreach activities. All of the essential elements of your program should be in place before you deliver it, including [marketing and outreach partners](#), [staffing and workflow](#), [marketing resources and 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 means coordinating with contractors, relevant program staff, and financial institutions to handle the influx of energy assessments, upgrade work, rebate requests, and loan applications.

Your program will use a variety of marketing and outreach approaches to reach your [priority audiences](#). As soon as your marketing activities are underway, you should also begin to [track progress](#) across your various tactics to identify what works well in your local market and make necessary mid-stream adjustments.

This handbook describes four key steps involved in delivering your marketing and outreach:

- Assess your marketing program’s readiness
- Consider a pilot or “soft launch”
- Undertake your marketing efforts
- Build on what works.

Marketing & Outreach

Stages:

[Overview](#)

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

Find related information across other program components:

- [Program Design & Customer Experience – Deliver Program](#)
Ensure a positive customer experience with your program from launch through implementation over time.
- [Evaluation & Data Collection – Conduct Evaluation](#)
Manage third-party impact and process evaluation activities by coordinating with evaluators, transferring data, and overseeing evaluation deliverables.
- [Financing – Deliver Program](#)
Launch your financing activities in coordination with other program components.
- [Contractor Engagement & Workforce Development – Deliver Program](#)
Implement contractor coordination and workforce recruitment and training in concert with other program components

Step-by-Step

Now is the time to use your [strategies and tactics](#) to deploy [messages and materials](#) that will create demand for your program offerings and to get ready for a sudden influx of interest in your program.

Consider a pilot or soft launch to test [your workplan and timelines](#), and start [collecting the data](#) to evaluate marketing efforts and make mid-stream adjustments based on the market’s response.

The following steps can help you effectively deliver the marketing and outreach activities for your program:

Assess your marketing program's readiness

Most aspects of [your program](#) should be in place before you launch marketing and outreach activities. Following are just a few questions to help you assess the readiness of your staff, materials, contractors, and other partners to support your marketing and outreach efforts:

- Have call center or helpline staff been thoroughly trained on your program pitch, rehearsed messaging, and practiced answering caller questions?
- Did you print enough materials for planned events and test your program's online sign-up forms or other website functions?
- Have contractors been apprised of the timing and content of your planned marketing and outreach efforts and received sales training on your offerings?
- Have you put processes in place to collect feedback from participants and troubleshoot any glitches in marketing and outreach implementation?

Spotlight on Austin, Texas



Better Buildings
NEIGHBORHOOD PROGRAM
U.S. DEPARTMENT OF ENERGY

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

Launch With a Short-Term Promotional Offer to Jump-Start Participation

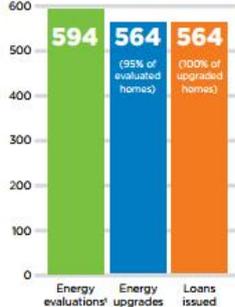
With its Best Offer Ever promotion, Austin Energy completed comprehensive energy upgrades in a record 564 homes in only six months—more than 10 times the utility's typical participation rate. To quickly develop momentum for Better Buildings-Austin Energy's Clean Energy Accelerator program with homeowners, 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.

The Best Offer Ever

Austin Energy's high-value promotion—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 evaluation,¹ 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.

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.



Category	Count	Percentage
Energy evaluations ¹	594	-
Energy upgrades	564	95% of evaluated homes
Loans issued	564	100% of upgraded homes

"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

The Better Buildings Neighborhood Program is part of the national Better Buildings Initiative led by the U.S. Department of Energy.

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

April 2011 Version 2

betterbuildings.energy.gov/neighborhoods

Source: [Spotlight on Austin, Texas: Best Offer Ever Produces Upgrades in Record Time](#), U.S. Department of Energy, 2012.

Limited time offers and other marketing initiatives can sell your program's offerings to target audiences quickly, especially if there is pent up demand. Make sure your program is ready to respond to potential customers – with fully staffed call centers, qualified contractors, and any financial offerings you plan to make available – so that customers are not left waiting and lose interest. Programs that plan for a steady flow of customers rather than a spike after marketing and outreach takes place might be unprepared for the backlog.

Contractors are a key component of customer satisfaction, so it is important to engage them, keep them fully informed, and make sure they are ready to respond to any requests for energy assessments or upgrades that result from your marketing efforts.

- If contractor capacity is a concern, consider scheduling limited-time offers during slower work periods, as Austin Energy in Texas did during its [“Best Offer Ever” campaign](#).
- [Enhabit](#), formerly Clean Energy Works Oregon, staff [timed rebates](#) during seasons when equipment was not needed (e.g., for furnaces during summer in the Pacific Northwest) to avoid surges in demand during the year. This approach allowed contractors to do the work in the months following the incentive application deadline and gave them some flexibility to manage their schedules and workforce.
- NeighborWorks of Western Vermont, established a [temporary labor pool](#) to help contractors respond to upticks in demand during busy periods.

Readiness Can Be Measured—Take It From Michigan

Before the [Michigan Saves](#) program launched its “neighborhood sweeps” – targeted outreach campaigns to create demand for upgrades in a given geographical area – program staff wanted to determine whether there would be sufficient community demand for an energy efficiency program in that neighborhood. The program developed a “readiness scale,” and determined that the following factors were good indicators of neighborhood readiness:

- Robust communication networks (including traditional and social media)
- Trusted local champions that can act as a liaison between a program and local residents
- Awareness of energy benefits
- Energy efficiency or related actions previously taken
- Demographics aligned with market research (e.g., income and education levels, home ownership, etc.)

Michigan Saves developed an [Energy Sweep Tool Kit](#) with lessons learned, sample materials, and more information that programs can use when assessing their own community readiness.

In Their Own Words: Assessing Community



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

Consider a pilot or “soft launch”

Piloting activities in one location or conducting a “soft launch” of outreach activities to a subsection of your priority audience is one way to assess how your marketing and outreach efforts will be accepted or whether your program is ready to respond to new demand. Coordinate this with your program team to decide which aspects, from financial incentives to full neighborhood sweeps, you will take on a trial run before expending major resources.

Soft Launch vs. Pilot Program

Not sure what the difference is between a soft launch and a pilot program? A pilot program is designed to test a concept or approach. It is experimental—an effort to gather information from implementing a program or strategy on a small scale (e.g., with a small set of homeowners and contractor partners) to determine whether a more significant investment in the approach is justified.

- For example, [Enhabit](#) conducted a one-year [pilot project](#) in Portland to learn as much as possible before extending the program to other parts of the state.

In contrast, a soft launch is the quiet startup of a fully operational program. Doing a soft launch means initially making your program available without a large splash. It means not telling everyone that your program is available right away, or perhaps not doing any outreach at all. For example, you might work with a few select contractors before recruiting 50 or 100 more to ramp up services. Or you might have eligible program staff or early supporters who are likely to provide constructive feedback. A soft launch is a chance to polish systems and processes so that everything is ready for planned growth.

- For example, the [Neighborworks H.E.A.T Squad](#) in Rutland, Vermont, held a [soft launch](#), initially making direct phone calls to residents focusing only on the town of Shrewsbury, Vermont before fully launching the program in other parts of the county.
- Similarly, [Michigan Saves](#) started with a [soft launch in Ferndale, Michigan](#) to initiate its approach for marketing the program through neighborhood "sweeps" of door-to-door outreach.

Programs have often had early success by recruiting high-profile early adopters to pilot the first home energy upgrade efforts so these influential people can ultimately promote their satisfaction among peers and constituents. Homeowners tend to trust their community leaders and like-minded neighbors more than information they receive via media or organizations they have not done business with previously. Learn more about trusted messengers in the [Marketing and Outreach Identify Partners handbook](#).

Another way to pilot aspects of a marketing campaign is to try different messages or designs for your [resources](#) with a small subset of your target audience. Upon seeing which version brings better results, you can deploy those tactics for an official launch to the rest of your audience.

During a soft launch or pilot program, assess how well key marketing and outreach aspects are working, such as:

- **Customer engagement** — is your marketing and outreach reaching customers and encouraging them to participate in the program? Which messages are most effective?
- **Contractor communication**— are contractors effectively communicating the programs messages to customers?

A soft launch or pilot program allows time and space to make improvements that you will inevitably identify once you start working with customers and contractors. When your launch occurs, your program will be ready for smooth operation.

Launch your marketing efforts

With the [strategies and tactics](#), [messages and materials](#), and [implementation plans](#) you have developed ready to go, it is time to launch. Following are a few rules of thumb from successful programs for launching marketing and outreach activities:

- **Use multiple, targeted outreach approaches.** Using multiple, targeted outreach approaches in a single community has proven effective in creating demand for home energy upgrades. See the [Develop Implementation Plans handbook](#) and the [Tips for Success in this handbook](#) for ideas and information on successful outreach approaches.
- **Align with trusted local organizations.** In [Lawrence Berkeley National Laboratory's Driving Demand for Home Energy Improvements report](#), some of the more successful programs were operated by or affiliated with [trusted local organizations](#) and marketed by word-of-mouth and other direct methods.
 - Building on their understanding of homeowners in Rutland County, Vermont, [NeighborWorks of Western Vermont](#) enlisted well-respected local citizens and organizations to spread the word about home energy efficiency upgrade opportunities, an effort that helped create demand for nearly 200 home energy upgrades in just six months.
- **Tap into your programs partnerships.** Partnerships can broaden a program's reach, so be sure to tap into your [program's partners](#) as you implement outreach activities to capitalize on their relationships with your priority audiences.

- **Engage contractors to help sell upgrades.** Contractors are key partners in selling energy efficiency upgrades. Learn more about using contractors as sales partners in the [Marketing and Outreach Identify Partners handbook](#).

- Contractor sales training has been very beneficial for many Home Performance with ENERGY STAR Sponsors and Better Buildings Neighborhood Program partners. Sales training provides the skills for contractors to complete energy efficiency upgrade sales with homeowners, an approach [Efficiency Maine](#) and others successfully undertook. Consider sales training for all new contractors and regular refresher trainings for current contractors and also ensure they are informed about changes in program offerings, such as incentives.

Spotlight on Maine



Better Buildings
NEIGHBORHOOD PROGRAM
U.S. DEPARTMENT OF ENERGY

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

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.

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.

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

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.

June 2012
betterbuildings.energy.gov/neighborhoods

Source: [Spotlight on Maine: Contractor Sales Training Boosts Energy Upgrade Conversions](#), U.S. Department of Energy, 2012.

- **Promote at relevant events or gathering places.** Keep an eye out for relevant community events or gathering places that offer opportunities to interact one-on-one with potential customers when they will be a captive audience.
 - "All aboard" was [RePower Bainbridge's](#) figurative call to action in April 2013 for its "Final Boarding Call" event. The free, one-day event featured trade allies, lenders, utilities, and community organizations in one location (a local middle school) to help homeowners complete home energy upgrades. An \$800 special rebate offer was extended to those attendees who signed up to work with a RePower trade ally to complete two or more qualifying energy efficiency upgrade measures. Nearly 70% of the 400 attendees took RePower up on its offer.

RePower Bainbridge Final Boarding Call



Source: RePower Bainbridge, 2013.

One Touch Is Not Enough

Effective marketing campaigns regularly utilize several different outreach approaches to reach their customers. [Houston's Residential Energy Efficiency Program](#) (REEP) used traditional and non-traditional outreach techniques to contact potential participants multiple times.

REEP organized block parties that attracted several hundred residents each, conducted door-to-door canvassing, and placed advertisements in community newspapers, radio, television, and the city's public transit system. The program used to send a letter to every household in its target neighborhoods, but stopped doing this because the response rate was low.

As a result of these efforts, REEP weatherized more than 8,300 households in 12 neighborhoods, and reached about 36% of eligible homes during the program's first four years.

According to program manager Gavin Dillingham, successful outreach is "a matter of trying a variety of marketing methods and seeing what works in your particular context."

Source: [Driving Demand for Home Energy Improvements](#), Lawrence Berkeley National Laboratory, 2010.

Build on what works and adjust as needed

Too often, programs establish marketing and outreach plans, then feel compelled to stick to the planned activities, even when they are not working. Some of the most successful residential energy efficiency programs achieved success because they changed course mid-stream and completely revamped their marketing and outreach efforts.

Take stock often during the early days of your marketing campaigns, as well as later in the program, to determine what is working (and what is not) and [make adjustments as needed](#).

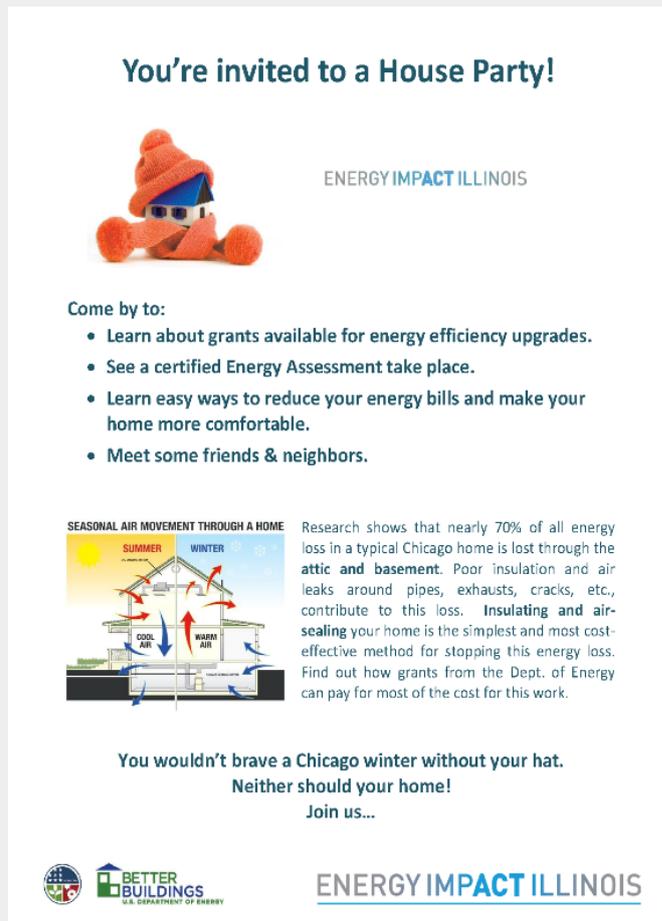
An established [data collection and evaluation plan](#) will enable you to track program progress. Continuously reviewing your key data metrics will help prepare you to [assess and improve program processes](#) and adjust marketing activities as needed.

Energy Impact Illinois Learns That Parties Sell Upgrades

When Better Buildings Neighborhood Program partner [Energy Impact Illinois](#) did not achieve the response expected from a mass media advertising campaign, an opportunity presented itself to try a different strategy - one that relied more on a community-based, boots-on-the-ground outreach campaign.

Through a one-year house party initiative, the program worked with trusted neighborhood champions to bring more than 3,000 Chicago homeowners, neighbors, and friends together during 652 house parties. Each gathering included a real-time demonstration of an energy assessment on a homeowners home, and the opportunity for attendees to sign up for their own assessment or upgrade. Program administrators estimate that more than 900 house party participants completed upgrades. Learn more about this direction change in the [Focus Series interview with Energy Impact Illinois](#).

House Party Flyer



The flyer is titled "You're invited to a House Party!" and features a cartoon character wearing a red winter hat and scarf. Below the character is the "ENERGY IMPACT ILLINOIS" logo. The flyer lists four reasons to come to the party: learning about grants, seeing a certified energy assessment, learning ways to reduce energy bills, and meeting friends and neighbors. It includes a diagram titled "SEASONAL AIR MOVEMENT THROUGH A HOME" showing air leaks in a house during summer and winter. The diagram shows warm air escaping in winter and cool air escaping in summer. Text next to the diagram states that nearly 70% of energy loss in a typical Chicago home is lost through the attic and basement, and that insulating and air-sealing is the most cost-effective method for stopping this loss. The flyer concludes with the message: "You wouldn't brave a Chicago winter without your hat. Neither should your home! Join us..." and features logos for the U.S. Department of Energy, Better Buildings, and Energy Impact Illinois.

You're invited to a House Party!

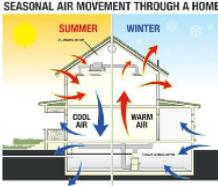


ENERGY IMPACT ILLINOIS

Come by to:

- Learn about grants available for energy efficiency upgrades.
- See a certified Energy Assessment take place.
- Learn easy ways to reduce your energy bills and make your home more comfortable.
- Meet some friends & neighbors.

SEASONAL AIR MOVEMENT THROUGH A HOME



Research shows that nearly 70% of all energy loss in a typical Chicago home is lost through the **attic and basement**. Poor insulation and air leaks around pipes, exhausts, cracks, etc., contribute to this loss. **Insulating and air-sealing** your home is the simplest and most cost-effective method for stopping this energy loss. Find out how grants from the Dept. of Energy can pay for most of the cost for this work.

**You wouldn't brave a Chicago winter without your hat.
Neither should your home!
Join us...**



Source: [Energy Impact Illinois Learns That Parties Sell Upgrades](#), U.S. Department of Energy, 2013.

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.

Adapt messages to your primary target audience's needs

Many programs found that market research can help identify, segment, and characterize audiences to understand how to prioritize them. A comprehensive [evaluation](#) of over 140 programs across the United States found that programs had greater success when they identified specific target populations within their larger target area, then tailored their outreach to the size of the target populations. Consider prioritizing audiences based on parameters such as demographics, values, housing type, fuel source, potential for savings, common problems with homes, property ownership structure, or program entry point (e.g., remodeling opportunities). For a starting point in your targeting efforts, look online for existing market segmentation data (e.g., municipal records, Zillow, a Nielsen segmentation system called PRIZM, U.S. Census Bureau).

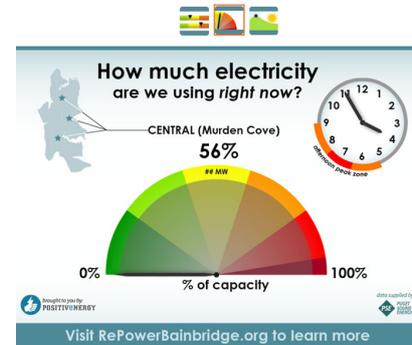
In Their Own Words: Benefits of Market Segmentation



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

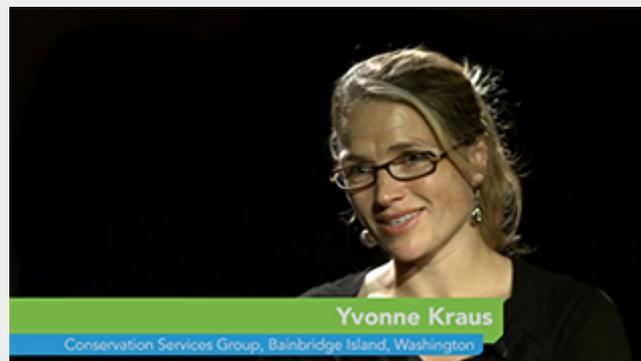
- The ShopSmart with JEA program in Jacksonville, Florida, purchased Neilson PRIZM lifestyle segmentation data, which included demographic, consumer behavior, and geographic information, to identify, understand, and reach potential home energy upgrade customers. The data divided consumers into 66 demographically and behaviorally distinct segments. Through this market analysis, ShopSmart with JEA discovered that out of those segments, one of the most promising demographics to market its program offerings was older people without children. ShopSmart was able to use this information to market the program specifically to this demographic, as well as identify and target new demographics that had not been active in the program previously.
- In Seattle, Washington, [owners of oil-heated homes](#) are ineligible for city-sponsored electric and gas utility rebates. [Community Power Works](#) purchased a mailing list from Data Marketing, Inc., that identified all owners of oil-heated homes in the city so the program could reach this previously untapped market. Given the lower efficiency and high cost of heating oil, the program recognized the energy and cost savings potential for these Seattle homeowners and engaged them in undertaking home energy upgrades by focusing outreach on the potential dollar savings that could be achieved by replacing old oil heaters. More than 700 Community Power Works customers who received the mailing then signed up for upgrades between April and August 2012. In the 11 months prior to the first mailing, only 20% of Community Power Works' upgrade projects involved oil-heated homes, and during the six months following the mailing, 50% of the homes were oil-heated. Among those homes, nearly 75% switched from oil heating to high-efficiency electric heating or high-efficiency electric heat pumps, as of mid-December 2012.
- California utilities provided several examples of market segmentation that targeted energy efficiency programs. The report [“Market Segmentation and Energy Efficiency Program Design”](#) by the California Institute for Energy and Environment (CIEE) provides an overview of market segmentation purposes, examples, and methodologies. Another CIEE report, [“Behavior Assumptions Underlying California Residential Sector Energy Efficiency Programs,”](#) examines how to influence customer behavior and choice.

Target program messages to what customers want, not what the program does. Although residential energy efficiency programs deliver energy efficiency services, customers are more likely to respond to offers of comfort, cost savings, increased home value, health, community pride, or something else they need and value.



- The RePower program in Washington state customized its marketing and outreach strategies to reach the environmentally conscious residents of Bainbridge Island, Washington, and Bremerton, Washington, a neighboring community with a lower income demographic. In Bainbridge, messaging focused on environmental stewardship, and an Island Energy Dashboard displayed real-time energy use in public spaces, such as local businesses and commuter ferries. Messaging geared toward Bremerton residents, meanwhile, emphasized job creation and reduced utility bills. Each location had its own community-specific website, color scheme, print advertising, online promotions, and case studies highlighting local energy champions to drive demand for residential energy upgrades.

In Their Own Words: Messaging to Motivate



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

- In Florida, solar energy is in high demand, so the [Solar and Energy Loan Fund](#) (SELF) used this as a gateway to reach homeowners. Through SELF, homeowners could receive a loan for solar energy upgrades after meeting certain energy efficiency thresholds. For example, if a home energy assessment showed that the home's envelope was already sealed (or would be sealed as part of the work), a homeowner could qualify for a loan for solar panels offered by the program.

Partner with organizations or individuals that customers already trust

Many programs found it useful to partner with a range of trusted organizations or individuals to market program offerings to their constituencies or followers. Better Buildings Neighborhood Program participants enhanced their marketing and outreach efforts by partnering with trusted local groups including:

- Community-based organizations and nonprofit organizations
- Large employers, such as local universities
- Respected members of the community (e.g., local elected officials, company executives, community opinion leaders)
- Utilities or fuel dealers.

Using partners' existing communications channels proved helpful for many programs. They found that marketing and outreach materials could be more effective when a potential customer received them from an organization with which they had an existing relationship. Engaging credible messengers in program promotion could also help influence individuals in those messengers' social networks to undertake upgrades.

- [Housing agency NeighborWorks of Western Vermont](#) found that residents of Rutland County, a small, rural community, consider [neighbors to be the most trusted messengers](#), rather than the local government, federal government, or utilities. The program enlisted respected local citizens and organizations to work phone banks and spread the word about home energy upgrade opportunities. This effort helped the program connect with low- and moderate-income homeowners and complete nearly 200 home energy upgrades just six months after the program began promoting its services to the community.
- When [Better Buildings Program San Jose](#) in California set out to encourage homeowners to undertake home energy upgrades, it [joined forces with trusted community-based organizations](#) to accomplish its goals. The program knew that religious organizations not only shared its mission but also had the ability to help. The City of San Jose previously worked in these communities with its partner, the Strong Neighborhoods Initiative, and was able to leverage the trust and goodwill generated by this program to increase its access to partners for the home energy upgrade program. The Most Holy Trinity Catholic Church lent its office space free of charge to Better Buildings Program San Jose, which saved overhead costs and allowed program staff to host meetings with homeowners to discuss their energy upgrade options and schedule home energy assessments. Additional events were held at a Boys and Girls Club in the community. Partnering with highly regarded organizations in the community enhanced the trustworthiness and visibility of the program.
- According to the Small Town Energy Program for University Park (STEP-UP) in Maryland, “low-cost social marketing using trusted, established neighborhood channels was the comparative advantage of the small town model” to catalyze homeowner action to upgrade their residences. STEP-UP’s social marketing approach included:
 - Newsletter
 - Town events
 - Direct mailing
 - STEP house parties
 - Yard signs
 - Neighbor-to-neighbor outreach

This [social marketing approach](#) proved to be effective and low-cost. STEP-UP’s marketing budget was just 3% of its overall program budget and resulted in 30% of town households signing up to participate in the program.

Foster “word of mouth” communication from satisfied customers

Programs found that encouraging word of mouth outreach by asking satisfied customers to promote their program experience to peers helped attract more homeowners who completed energy upgrades. Referrals from neighbors and friends who are happy with their energy improvements can provide a good source of leads. Marketing materials can feature homeowner testimonials about real benefits to build community trust in the program and enhance energy efficiency awareness efforts.

The research paper, [Environmental Sustainability and Behavioral Science: Meta-Analysis of Proenvironmental Behavior Experiments](#), analyzed the most effective methods for encouraging environmentally sustainable behaviors. The authors define “social modeling” as the passing of information via demonstration or discussion in which the participants indicate that they personally engage in the behavior. This concept can be one of the most effective behavioral tactics for promoting home energy efficiency. Many programs found that homeowners are more likely to participate after hearing neighbors or peers describe their experience and how they benefited.

- As part of its efforts conducting “neighborhood sweeps” to test various outreach strategies in 58 different neighborhoods across the state, [Michigan Saves](#) regional coordinators learned that preparing neighborhoods for the sweep was essential. To prime neighborhoods for sweeps, the program first worked with [early adopters](#), who were trusted, high profile people who could publicly vouch for and perhaps canvas neighborhoods for the program. In some cases, the early adopter was from a neighborhood church, and in others, the community trusted their mayor, local council, or a nonprofit organization. These early adopters helped spread the word about Michigan Saves, formerly BetterBuildings for Michigan, by encouraging colleagues to sign up for the program at community events, meetings, press events, and in printed marketing materials and written testimonials on websites. Brochures and word-of-mouth recommendations doubled and tripled sign-up rates, respectively. Regional coordinators based their marketing plans on using these trusted messengers in letters, case studies, community meetings, and canvassing efforts.




**HELPING GVSU
FACULTY & STAFF
PLUG INTO
SAVINGS**

**“Before the audit we thought
we had to replace all our
windows—not so.
The audit saved us
thousands of dollars!”**

Olwen Urquhart
 GVSU TRAT Project Manager
Michael Scantlebury, Ph.D.
 Associate Professor

To learn more about Olwen's and Michael's
 BetterBuildings for Michigan experience
 visit their profile at <http://www.bbmgr.org/gvsu/profiles>

WARMER HOMES LOWER UTILITY BILLS!

Source: Michigan Saves

- Using social media such as Facebook, the [Milwaukee Energy Efficiency program](#) (Me²) promoted “referral rewards” to customers who recruited their friends and family to sign up for the program. Homeowners would enter their friend’s contact information into the Refer a Friend section of the Me2 website. In return for providing this lead to the program, the homeowner received one free LED light bulb. If the friend signed up for the program, they would both receive \$50.

Language matters – use words that resonate with your target audience

Words have power, so many programs decided to use language with positive associations. For example, the Better Buildings Neighborhood Program encouraged use of the term “assessment” instead of “audit” to avoid the negative connotation of a tax audit. “Home energy upgrade” sounds more positive than “retrofit,” a term that might not be clear to the average consumer or may imply something old that underwent makeshift improvements in order to work.

Programs found it was important to create messages and materials that resonated with homeowners. Messages were more likely to be well received if the messenger sounded and looked like the target audience. Vivid examples (e.g., “home performance professionals are mechanics for your home”) and statements of avoided loss rather than gain (e.g., “until you get the flue fixed, your hard-earned cash is flying right up that chimney”) worked better to inspire potential customers to participate. A comprehensive [evaluation](#) of more than 140 programs across the United States found that successful programs were more likely than others to promote upgrades on the basis of increased comfort.

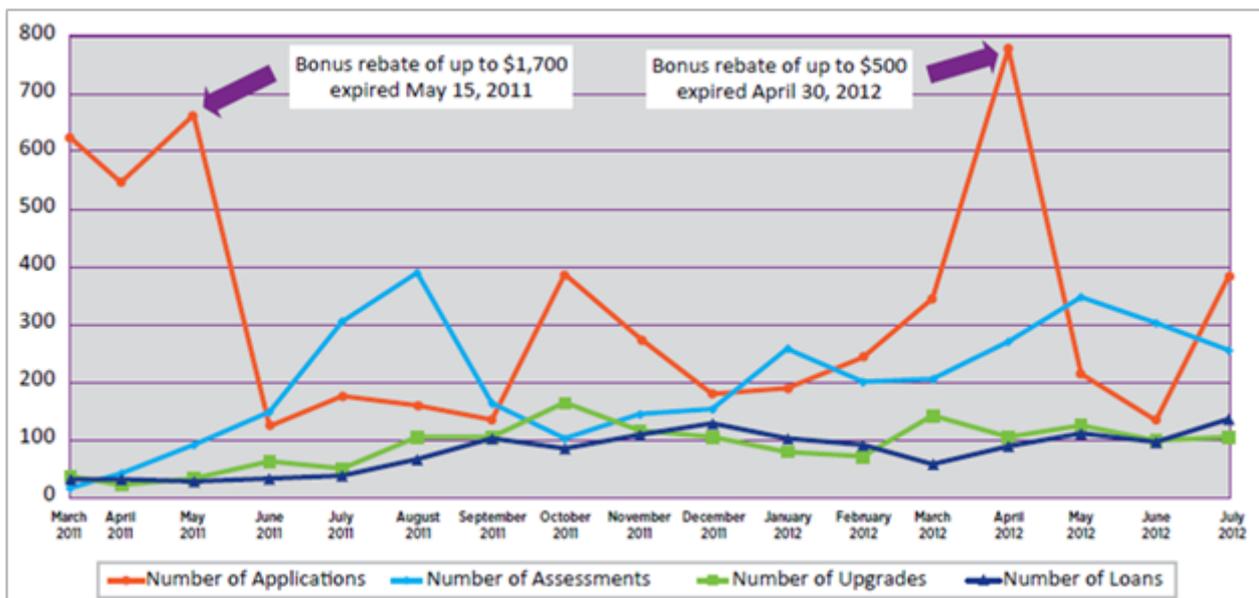
- [Michigan Saves](#) program staff who spoke directly to residents while canvassing homes during neighborhood “sweeps” initially found little success convincing homeowners to sign up for the program. The problem was that their messages were framed around energy savings and environmental benefits, and they used energy efficiency jargon, such as “reducing leakage” in the home. Once the program reframed its messages around comfort and lower heating bills, canvassers felt better received by the homeowners; they also talked about specific neighbors down the block who were feeling fewer drafts since their participation in the program.
- Philadelphia’s [EnergyWorks](#) married comfort with value in their online advertising’s weather-focused messaging, which included phrases like “Lower utility bills, warmer cocoa breaks.” From October 15 through December 15, 2011, when these advertisements ran, the program received 9,350 website visitors, 77% of who were reported as new visitors.

Motivate action through financial incentives and time-limited offers

Incentives can be the easiest approach to overcome motivation barriers and attract customers’ and contractors’ attention, as long as the upgrade and reimbursement processes are kept simple and easy to follow. Successful programs have found incentives help entice customers to complete upgrades, particularly during limited time offers when a deadline further motivates action. Because incentives are expensive for programs, determining the minimum level needed to achieve your goals or offering incentives for limited periods can be important strategies for success. Also, according to a comprehensive [evaluation](#) of more than 140 programs, successful programs were able to offer lower incentives than other programs that also had incentives.

- **Efficiency Maine** used large incentives during the program launch to create consumer demand for energy improvements and stimulate contractors' interest in adapting their business models to accommodate more comprehensive energy upgrades. From January 2010 through May 2011, homeowners could receive a rebate for 30% of project costs, which could total up to \$1,500 for comprehensive projects that were projected to achieve at least 25% energy savings. To further motivate consumer and contractor action, Efficiency Maine launched an additional, limited-time \$1,000 bonus incentive in the summer of 2010. As Efficiency Maine's rebate funds wound down in spring 2011, the program underwent a one-month transition period during which customers could qualify for both rebates and financing. This approach, in addition to contractor sales training, [residential direct installs](#), and other program design features, contributed to the creation of a successful market for residential energy efficiency in Maine. Learn more in the U.S. Department of Energy case study, [Spotlight on Maine: Transition to a Sustainable Level of Incentives](#).
- **Michigan Saves**, formerly BetterBuildings for Michigan, focused its incentive dollars on completing home energy upgrades rather than on energy assessments and direct install measures, after experimenting with various incentive designs from November 2010 through March 2012. When they adjusted the program's incentive structure in this way, program staff saw the conversion rate from assessments to upgrades increase, depending on the neighborhood, from a range of 5-25% up to a range of 30-60%. The incentives for deeper energy upgrade packages, including air sealing and duct sealing, seemed to attract a higher percentage of the eligible population—20% to 30% participation for a package valued at around \$1,000 versus 10% to 15% participation for a package valued at around \$350. Learn more in the U.S. Department of Energy case study, [Spotlight on BetterBuildings for Michigan: Experiment to Find the Right Mix of Incentives](#).
- To develop momentum for its Clean Energy Accelerator program, **Austin Energy** started off with a 3-month **Best Offer Ever** promotion from October 1 through December 31, 2010, that offered a combination of rebates from local utilities that varied based on work performed and interest rates that were bought down to 0%, representing an additional \$1,200 in incentives per household compared to Austin Energy's typical offer. Contractors completed comprehensive energy upgrades in a record 568 homes in the six months after the campaign launch.
- In addition to its base rebate levels, **Enhabit**, formerly Clean Energy Works Oregon, offered **limited-time bonus rebates** on top of its \$2,000 base rebates (\$500 for the assessment and up to \$1,500 for the upgrades) to grab the attention of potential customers. The first limited-time promotion occurred in spring 2011 and offered an additional \$1,700 to the program's base rebate. The second promotion was offered in March and April 2012 and added \$500 to the base rebate. The program found that repeatedly offering bonus promotions attracted the attention of new customers each time, even as the program reduced the dollar amount of the bonus from \$1,700 to \$500.

Enhabit's Applications, Assessments, Upgrades, and Loans Per Month (March 2011 - July 2012)



Source: [Spotlight on Portland, Oregon: Use Incentives to Get Attention and Encourage Deep Savings](#), U.S. Department of Energy, 2011.

Programs often discover that offering limited time incentives can bring about a sizable surge in assessment and upgrade requests. A few programs found that they were not sufficiently prepared for the additional work and lost interested customers because they could not get back to them quickly. Some programs added temporary staff for call centers when a big push was set to take place, or created a temporary pool of contractors to help with increased workloads; others scheduled their incentives to coincide with seasonal capacity.

- NeighborWorks of Western Vermont's (NWWVT) [Home Energy Assistance Team](#) (H.E.A.T. Squad) incentivized homeowners to complete a home energy assessment by offering the assessment for \$50, which was \$200 less than the typical evaluation cost offered to Vermont residents through Efficiency Vermont. One year in, the program found that its contractors were struggling to keep up with surging demand for home energy upgrades. In 2011, NWWVT established [LaborWorks@NeighborWorks](#) (LaborWorks) as a nonprofit temporary labor pool to assist professional contractors involved with the H.E.A.T. Squad during busy periods when they could not keep up with demand or hire full-time help. The extra staffing helped reduce the number of backlogged projects.
- When planning its [Best Offer Ever promotion](#), [Austin Energy](#) collaborated with contractors to account for their seasonal workload and launched the promotion during the fall and winter, typically the slow season for contractors in an otherwise sunny and hot region of Texas. This careful timing increased the likelihood of upgrades being completed in a timely manner and helped contractors avoid seasonal layoffs. Contractors completed comprehensive energy upgrades in a record 568 homes in the six months after the campaign launch.

Conduct one-on-one outreach where people gather at their own homes

Programs that conducted one-on-one outreach found that community events provided good opportunities for the program and its partners to connect and build credibility with potential customers. Particularly successful events were ones that attracted the program's target audience and aligned with their program's messaging—such as an Earth Day celebration, home improvement expo, or green fair—because these events had established participants.

Programs found events to be the most successful when the program provided the opportunity for interested homeowners to take action (e.g., sign up for a neighbor-hosted information session, schedule a home energy assessment) right on the spot. Every program found that some events they thought would be great actually deliver fewer leads than expected, so it is important to track the number of leads and program participants that result from each event to determine the effectiveness of participating.

Neighborhood canvasses or "sweeps," were another tactic used by some programs to directly reach potential customers. Sweeps can be time- and labor-intensive undertakings that some programs found to have the greatest impact when targeting specific communities likely to participate in the program. Sweeps were successful for some programs, but not all. A comprehensive [evaluation](#) of more than 140 programs across the country suggests that programs engage in a concerted priming effort in the target area before canvassing the neighborhood. Learn more about neighborhood sweeps in the [Marketing and Outreach Develop Implementation Plans handbook](#).

- [Energize Phoenix](#) held a community energy efficiency exhibit and contractor fair at the local library to promote its "One Day Only" financial incentives of up to \$3,000 per home. Sixteen out of 25 approved contractors participated. More than 500 people attended, 125 homeowners signed up for a home energy assessment on the spot, and the program noted an impressive 58% conversion rate from home energy assessments to home energy upgrades.



Source: Energize Phoenix

- [Sacramento Municipal Utility District's Neighborhood Program](#)—a Better Buildings Neighborhood Program partner in California—promoted its home energy upgrade program at high school fundraisers, outdoor concerts, homeowner association meetings, parent-teacher association meetings, car shows, and other community events. The program sent direct mail pieces to invite homeowners to attend, speak directly to the participating contractors, and sign up for a free home energy assessment at the event. At some events program staff also had activities for children and prizes or giveaways for homeowners who signed up for their free assessment. The program found that 65% of homeowners who heard about the program did so through these community events.

Communicate with audiences at least three times; once is not enough

All residential energy efficiency programs have found that outreach needs to be repeated to connect with and remind potential participants about program offerings. As marketing gurus note, the majority of people need to be exposed to a product message at least three times (on separate occasions) to buy into it. The more time between communications, or “touches,” the less likely the customer will take action. Some programs even coordinated marketing strategies with partners, so that potential customers get multiple, complementary touches from different communication channels or groups.

- **NOLA WISE** (New Orleans, Louisiana, Worthwhile Investments Save Energy) used a combination of traditional paid media, grassroots outreach, and earned media outlets to communicate with its audience. The program generated the highest number of high-quality leads through its homeowner showcases, which were events held at the home of a resident who completed upgrades. The NOLA Wise team and contractors were on hand to highlight the completed home energy upgrades and educate attendees on how to make their own homes more comfortable and energy efficient. NOLA WISE’s homeowner showcases were promoted through neighborhood canvassing, electronic newsletters, social media, collaboration with nearby neighborhood associations, and earned media strategies.
- Philadelphia’s **EnergyWorks** promoted its program through a multi-phased advertisement plan. This first phase focused on radio and weather-related websites to take advantage of peoples’ moods during specific weather conditions, which resulted in 15,000 visits to the EnergyWorks website and 303 completed home energy assessments. The second phase used print, online, and regional rail marketing materials to create a sense of urgency to compel consumers to act on their immediate needs by introducing the benefits of energy efficiency. In its third phase, EnergyWorks’ advertising continued to emphasize the value and comfort of energy efficiency upgrades, and introduced an educational component that defined some common home energy upgrade terms, such as insulation and air sealing, in ways customers could understand.

EnergyWorks Aligns Advertisements With Weather

Source: [Energy Efficiency Residential Marketing Keep it Simple. Keep it Focused](#). EnergyWorks, 2012.

These EnergyWorks online banner ads rotated on accuweather.com during days with anticipated temperatures of 85 degrees or above.

Follow through with customers

Following up on leads that result from your marketing and outreach efforts quickly and consistently will help your program convert them from interested parties to satisfied customers. Many programs found a sizable drop-off in action if they or their contractors were not able to follow up within a few days to a week. Additionally, contacting initially interested participants regularly (e.g., through a monthly email, with a phone call every few months) was also a successful strategy for turning potential customers into paying customers.

- **BetterBuildings for Michigan** saw more homeowners undertake upgrades in cities where it held a neighborhood sweep and followed the sweep with a city-wide offering a year later. While the program initially planned for a timeframe of four to six weeks for homeowners to decide whether or not to undertake a home energy upgrade, following up with customers after giving them time to better understand the program’s offer helped BetterBuildings for Michigan achieve success. Based on the success of the initial follow-up offers, BetterBuildings for Michigan lengthened the time for each sweep to a full year. Overall, the program was able to complete nearly 8,000 home energy assessments and more than 6,300 home energy upgrades.

One successful approach programs used to maintain this connection was through energy advisors who followed up with homeowners after their initial interest and coached them through the home energy upgrade process.

- The **Greater Cincinnati Energy Alliance** (GCEA) realized that many of the homeowners who signed up to learn more about the program were getting stuck between creating their online profile to initiate program participation and completing a home energy assessment, and then between the energy assessment and home energy upgrade stages. Instead of accepting these customers as losses, GCEA had its full-time energy advisor make phone calls to each of these customers to learn why they were not completing their home energy assessments or upgrades and to explain to customers how to move on to the next stage. By explaining the entire upgrade process to individuals, GCEA was able to ensure that potential customers did not drop out of the program simply because their questions were not answered, they did not understand how the program worked, or they forgot that they signed up in the first place. Of the customers the energy advisor contacted, 50% who completed assessments followed through to complete home energy upgrades.

- The [Denver Energy Challenge](#) provided customers with [free energy advisors](#) who recommended energy improvements and guided participants through the process. The program found that those advisors with a background in customer service had a better conversion rate than those whose expertise focused on building science. Overall, three out of every four customers who worked with an energy advisor went on to complete a home energy upgrade. Although not all participants made all of the improvements recommended at once, because Denver's energy advisors kept in touch with participants, program staff reported that many homeowners completed additional upgrades later on in the process.
- Connecticut's [Neighbor to Neighbor Energy Challenge](#) used energy advisors and a customer management database to help ensure that their contractors were following up on leads and following through with customers in a timely manner. Through weekly meetings with contractors and daily monitoring of contractor activities, the program's energy advisors made sure contractors were leading potential customers through the program's next steps. The program set up its database to send automatic reminders to contractors when they needed to take a new step with the homeowner. This regular follow-up helped ensure that homeowners heard back from contractors within a certain number of days, depending on where they were in the process.
- [Michigan Saves](#), formerly BetterBuildings for Michigan, saw more homeowners undertake upgrades in cities where it held a neighborhood sweep and followed the sweep with a city-wide offering a year later. While the program initially planned for a timeframe of four to six weeks for homeowners to decide whether or not to undertake a home energy upgrade, following up with customers after giving them time to better understand the program's offer helped Michigan Saves achieve success. Based on the success of the initial follow-up offers, Michigan Saves lengthened the time for each sweep to a full year. Overall, the program was able to complete nearly 8,000 home energy assessments and more than 6,300 home energy upgrades.

Make upgrade benefits visible by showcasing completed projects and actual results

Unlike remodeling projects, home energy upgrade benefits are generally not immediately visible to the casual observer. Strategies that demonstrate tangible benefits from upgrades can help increase understanding and motivation with potential customers. To help energy efficiency become real, some programs successfully used house parties and demonstration homes to show potential customers what a home energy assessment or upgrade entails. In some cases, the hosts of these events were interested or satisfied customers who invited friends and neighbors, allowing the program to leverage word-of-mouth marketing from trusted sources. Program staff and a contractor were typically present to walk the attendees through a home energy assessment of the house or, when showing an upgraded home, point out the home performance measures that were installed.

California Puts Homes on Display



Source: California Center for Sustainable Energy

[In Their Own Words: Engaging Neighbors Through Home Energy Showcases](#)



- During a one-year "house party" initiative, [Energy Impact Illinois](#) worked with trusted neighborhood champions to host more than 650 house parties, which enabled more than 3,000 Chicago homeowners, neighbors, and friends to see for themselves what energy efficiency upgrades can mean to a home. Each gathering included a real-time energy assessment demonstration on the homeowner's home, and the opportunity for attendees to sign up for their own assessment or upgrade. Program administrators estimated that more than 900 house party participants completed upgrades. Learn more 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 [demonstration home tours](#), which successfully promoted both energy assessments and the contractors who performed them. During the tours, neighbors heard testimonials from demonstration homeowners, took a firsthand look at contractors' work, asked questions of the contractors who installed the upgrades, learned about available incentives, and had an opportunity to sign up for an energy assessment of their own home. Between January 28 (when the initiative formally launched) and April 21, 2012, about 25% of the home tour participants signed up for a home energy assessment with a contractor.
- [NOLA WISE](#) (New Orleans, Louisiana, Worthwhile Investments Save Energy) generated its highest number of high-quality leads through its Homeowner Showcases. NOLA WISE organized and promoted the open house events, which were hosted by homeowners who completed home energy upgrades. The NOLA Wise team and contractors were present to highlight the completed home energy upgrades and educate attendees on how to make their own homes more comfortable and energy efficient. The program saw an uptick in home energy assessment requests in neighborhoods where these events were held.

Provide expertise and newsworthy stories to media outlets to garner earned media coverage

Many successful programs found that getting media attention for their offerings and benefits helped add credibility to marketing efforts and expand their reach. By positioning "green" stories or home improvement mini-segments on local television or radio stations, they provided timely content that generated interest in their programs' services (e.g., a story about how to cool homes in a heat wave).

Although television coverage or advertising may not always generate immediate leads, it can increase program recognition and lay the groundwork for future leads. Successful programs also tracked where customers heard about their program to understand which outlets were working (e.g., by including promotional codes on materials and asking for the code when potential customers call or visit the program's website).

- The media is often interested in stories about the first or the biggest, or about breaking thresholds. The [Greater Cincinnati Energy Alliance](#) used its 1,000th upgrade milestone as the basis for a press conference, which garnered newspaper and television coverage for the program and its satisfied customers.
- Virginia's [Local Energy Alliance Program](#) (LEAP) earned media attention for its "house doctor," Guy Caroselli. As an expert on building science and energy efficiency, Mr. Caroselli hosted a weekly radio show, provided home improvement advice at events, and wrote a blog to address recurring issues for contractors and homeowners. Putting a voice with specific expertise in home improvement added a great deal of credibility and human interest to LEAP's outreach efforts.

• **LEAP's House Doctor Is In**



Source: Local Energy Alliance Program

LEAP's "House Doctor" creative approach to providing advice on home energy efficiency garnered media attention for the program.

- The [Solar and Energy Loan Fund](#) (SELF) in St. Lucie County, Florida, was able to capture media coverage by continuously refreshing its messages and maintaining a tone of "new-ness" to what the program was doing. SELF found that highlighting "first" experiences (e.g., its first Community Reinvestment Act loan, the county's first property assessed clean energy [PACE] program) was key to this approach. As these first experiences are hard to maintain over time, the organization also drew attention to milestones such as its 200th client or hitting a \$2 million dollar mark in its lending. Finally, SELF shifted from its own success to highlighting the success of others related to its efficiency program and sharing stories about its customers as well as its affiliated contractors. By stressing that SELF was the local community's nonprofit and that the successes achieved were not only for SELF but for the community as a whole, this engaged the local media over time.

Examples

The following resources are examples from individual residential energy efficiency programs, which include case studies, program presentations and reports, and program materials. The U.S. Department of Energy does not endorse these materials.

Case Studies

[Spotlight on Austin, Texas: Best Offer Ever Produces Upgrades in Record Time](#) (555 KB)

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 assessments, inspections, improvements, and loan origination, while learning valuable lessons along the way.

[Spotlight on Rutland County, Vermont: How Local Ties Lead to Local Wins](#) (552 KB)

Author: U.S. Department of Energy

Publication Date: 2011

Building on its understanding of homeowners in Rutland County, Vermont, NeighborWorks of Western Vermont (NWWVT) enlisted respected local citizens and organizations to spread the word about home energy efficiency upgrade opportunities, an effort that helped drive demand for nearly 200 home upgrades in just six months

[Spotlight on Maine: Contractor Sales Training Boosts Energy Upgrade Conversions](#) (411 KB)

Author: U.S. Department of Energy

Publication Date: 2012

This case study explains how Maine provided contractor sales training to boost upgrade conversions.

[Spotlight on Austin, Texas: Let Your Contractor Be Your Guide for Big Rewards](#) (445 KB)

Author: U.S. Department of Energy

Publication Date: 2011

This case study discusses strategies that Austin Energy, a municipally owned utility, used to collaborate closely with building contractors to launch a new Best Offer Ever promotion quickly and effectively.

[Focus Series: Energy Impact Illinois Learns That Parties Sell Upgrades](#)

Author: U.S. Department of Energy

Publication Date: 2013

This case study discusses Energy Impact Illinois' marketing evolution from a broad outreach campaign to a "house party" approach that brought Chicago homeowners, neighbors, and friends together to learn about energy efficiency opportunities, while increasing demand for home energy assessments and upgrades.

[LaborWorks@NeighborWorks of Western Vermont Focus Series](#) (385 KB)

Author: U.S. Department of Energy

Publication Date: 2012

LaborWorks@NeighborWorks is a nonprofit temporary labor pool developed by NeighborWorks of Western Vermont (NWWVT) to assist professional contractors involved with the NeighborWorks Home Energy Assistance Team (HEAT). In the first of this Focus Series, DOE interviews Melanie Paskevich, HEAT Squad coordinator, to get details on why NeighborWorks set up the temporary labor pool, how workers are recruited, and lessons learned for other programs to consider.

[Spotlight on Portland, Oregon: Use Incentives to Get Attention and Encourage Deep Savings](#) (2 MB)

Author: U.S. Department of Energy

Publication Date: 2012

This case study shares how Clean Energy Works Oregon (now Enhabit) used performance-based incentives, limited-time bonus rebates, early financing approvals, and seasonal advantages to implement financing tools that broaden its program reach and increase home upgrade completions.

Program Presentations & Reports

Illinois Home Performance: Successful Marketing Strategies

Author: Will Baker, Midwest Energy Efficiency Alliance

Publication Date: 2012

This presentation describes the Illinois Home Performance program and marketing strategy lessons learned.

Program Materials

None available at this time.

Toolbox

The following resources are available to help design, implement, and evaluate possible activities related to this handbook. These resources include templates and forms, as well as tools and calculators. The U.S. Department of Energy does not endorse these materials.

Templates & Forms

[Example Survey for Successful Participants](#) (144 KB)

Author: U.S. Department of Energy

Publication Date: 2011

Sample email survey template for successful program participants.

[Example Phone Survey for Screened-out Applicants](#) (211 KB)

Author: U.S. Department of Energy

Publication Date: 2011

Sample phone survey for applicants who have been screened out from participating in the program.

[How to Write a Press Release](#) (154 KB)

Author: U.S. Department of Energy

This instructional template offers instructions on how to write a press release.

Tools & Calculators

[Fostering Sustainable Behavior: Community-Based Social Marketing website](#)

Author: McKenzie-Mohr & Associates, Inc.

Publication Date: 2006

This website provides resources for those working to foster sustainable behaviors. Users can access to the book, *Fostering Sustainable Behavior*; search databases of articles, case studies, and turnkey strategies; and participate in discussion forums.

[Community Sweep Tool Kit](#)

Author: BetterBuildings for Michigan

Publication Date: 2013

The BetterBuildings for Michigan program developed a Community Sweep Tool Kit, which includes lessons learned, sample materials that can be used, and more information on the concept of community readiness.

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

None available at this time.

Publications

[Marketing & Outreach for Home Energy Improvements](#)

Author: Lawrence Berkeley National Laboratory

Publication Date: 2010

This guide provides an assessment of various approaches to Marketing & Outreach for home energy efficiency improvements.

[Overview of Marketing Methods for Local Retrofit Programs](#)

Author: Oak Ridge National Laboratory

Publication Date: 2011

This report shares strategies for marketing local energy efficiency programs, particularly through focused messaging, leveraging partnerships, and social media.

[A Policymaker's Guide to Scaling Home Energy Upgrades](#)

Author: State and Local Energy Efficiency Action Network

Publication Date: 2015

This Guide is designed to help state and local policymakers to take full advantage of new policy developments by providing them with a comprehensive set of tools to support launching or accelerating residential energy efficiency programs. The Guide focuses on four categories of policies that have proven particularly effective in providing a framework within which residential energy efficiency programs can thrive: incentives and financing, making the value of energy efficiency visible in the real estate market, data access and standardization, and supporting utility system procurement of energy efficiency.

[Making the Case: Winning Messaging for Energy Efficiency](#)

Author: Resource Media

Publication Date: 2015

This publication draws on recent focus groups, polls, and other research to chart a path promoting energy efficiency through language and imagery in ways that tap public enthusiasm.

Webcasts

None available at this time.

