

# Project Implementation Plan

Colorado Retrofit Ramp-Up Project

## Task 1.0 Access to Information: Concierge Programs and Social Mobilization

### Subtask 1.1 Boulder County's Energy Concierge Program

#### **Program Name: Residential Energy Concierge**

**Description:** The energy concierge program is an element of our Two Techs Program that works with residential property owners to develop a package of priority measures for installation, assist with contractors, explain financing options, and provide assistance with rebates. An energy concierge will be present at all energy audits providing varying levels of services, acting as the customer's advocate and facilitating their conversion from audit to action. In many cases, the energy concierge may engage with the customer prior to the audit to explain the process and help customers understand expectations and gain a comfort level with the program. The concierge program will be closely aligned with implementation assistance and social mobilization efforts to encourage energy efficiency retrofits.

#### **Implementation Strategy**

##### **Energy Concierge Phase 1: Design (weeks 1 – 25)**

- Finalize program design with help of key stakeholders, partners and consultants.
- Draft Request for Proposal to administer the Energy Concierge Program.
- Hire consultant/vendor for program administration.
- Current key program components include:
  - Technical facilitation:
    - Conduct walkthrough audits & identify the need and best locations for direct installation measures.
  - Consumer education:
    - Walk through the home with customers to point out and discuss behavioral and low cost retrofit actions they can take, such as demonstrating how to program a thermostat or looking at furnace filters and discussing how frequently they should be changed.
    - Review educational materials on behavioral actions and complementary GHG reduction programs (e.g., transportation, waste reduction, etc.), described in greater detail below.
  - Determine appropriate applications and quantities of direct installation measures based on energy assessment.
  - Facilitate customer investment in energy efficiency measure installation:
    - Discuss all available rebates and incentives, fill out and submit applicable rebate applications.
    - Explain available financing options such as Micro Loans and the ClimateSmart Loan Program and facilitate application and rebate process.
    - Design an ongoing action plan for interested customers wishing to install comprehensive upgrades over time.

- Help rental property owners understand SmartRegs compliance options, as needed, and design a cost effective approach to meeting SmartRegs requirements.
- Provide ongoing measure installation support and facilitation, as requested by customers.
- Develop homeowner recognition across the spectrum of participation levels.
- Identify and evaluate similar programs being implemented in other parts of the country.
- Look for ways to integrate social mobilization efforts into the program.
- Evaluate the local market for and potential impacts of the program.
- Develop concise messaging for marketing advertising programs.

### **Energy Concierge Phase 2: Plan and Pilot (weeks 20 – 45)**

- Integrate Enterprise Management Systems and Customer Management Systems Launch program in early September.
- Identify and purchase educational and energy efficiency materials for residences to sample (CFLs, power strips, vending misers).
- Plan logistics for outreach events: identify geographic areas, social networks and market segmentation; coordinate outreach and advertising efforts with social mobilization team.
- Develop a survey tool or a feedback mechanism to measure homeowner reactions to the implementation results, and homeowners needing more assistance.
- Develop and deliver case studies, fact sheets, website, and other materials.

### **Energy Concierge Phase 3: Implementation and Evaluation (weeks 25 – 52)**

- Target communities and social networks through social mobilization efforts.
- Coordinate the Energy Concierge with the Two Techs and a Truck program.
- Deliver follow up assistance.
- Provide rebate information and rebate assistance.
- Monitor and verify energy efficiency equipment installations.
- Develop case studies demonstrating project successes with information on energy/cost savings, payback periods, and improvements in comfort, and productivity.
- Provide recognition to homeowners participating in the key program components
- Work with utility and other partners to provide education and assistance to energy efficiency.

## **Denver's Energy Concierge Program**

### **Program Name: Energy Concierge**

**Description:** Denver's energy concierge program will function similarly to Boulder's program (analyzing energy audits, assisting with contractors, explaining financing options, and providing assistance with rebates), but will be structured to leverage existing Denver programs and reflect the demographic differences between the two communities.

### **Implementation Strategy**

#### **Denver Energy Concierge Phase 1: Design (weeks 1 – 25)**

- Release RFP and make vendor selections for residential and commercial energy concierge program.
- Recruit and hire residential and commercial program manager positions.
- Procure materials for outreach events during quarter.
- Negotiate and execute contract with Governor's Energy Office to integrate rebates into Recharge Colorado program
- Current Key Program Elements Include:

- Both the residential and commercial energy concierge program will have two components to ensure a neighborhood-specific focus, while providing professional technical assistance services. The residential program will be directly tied to Denver’s existing neighborhood outreach programs, and build upon the successes of the neighborhood approach. By recruiting volunteers directly from the targeted neighborhoods, and hiring neighborhood leaders to serve as concierges in those neighborhoods, Denver has had more success in engaging traditionally difficult-to-reach groups compared to traditional marketing efforts.
- The neighborhood concierge will be the resident’s key contact through each stage of project implementation, lead individualized consumer education efforts, facilitate project completion, and provide follow-up as necessary.
- The business concierge program will expand an existing business outreach program, and use City employees to provide similar services to businesses in targeted neighborhoods during energy outreach events, surrounding Business Improvement Districts, and various Chambers of Commerce.
- In order to ensure that services are provided by programs representatives with the required expertise, on-call technical assistance support will be procured to assist both the neighborhood and business concierges in supporting the audit process, and answering resident’s technical/construction questions when needed.
- The City will work closely with Xcel Energy on all programs to ensure greatest uptake of existing Demand Side Management (DSM) incentives. A long-term goal is to ensure program sustainability after the grant period by working closely with Xcel to integrate these outreach and concierge programs directly into the DSM program structure.

**Denver’s Energy Concierge Phase 2: Plan and Pilot (weeks 20 – 45)**

- Execute contracts with concierge vendors.
- Launch residential and commercial concierge programs
- Implement 3 neighborhood energy outreach events

**Energy Concierge Phase 3: Implementation and Evaluation (weeks 25 – 52)**

- Program and contract management to ensure successful outcomes of concierge programs.
- Implement 3 neighborhood outreach events.

**Garfield’s Clean Energy Challenge Program**

**Description:** Garfield’s Clean Energy Challenge program builds off of the business and household energy efficiency program just launched using Garfield’s initial entitled community EECBG. The program uses energy coaches to walk businesses and households through energy tracking and energy management systems, energy audits, connecting with contractors for energy contractors, tapping utility rebates and any additional financing incentives. The Colorado Ramp up program will allow the Garfield program to dramatically scale up, address critical financing barriers, and reach entire neighborhoods and business districts. A key element of the Garfield approach is a countywide challenge between communities and chambers of commerce to spur participation rates.

**Implementation Strategy**

**Garfield Clean Energy Challenge Ramp-up Phase 1: (weeks 1 through 10)**

- As soon as statewide financing district (HB1328 solution) moves forward, provide steps for Garfield County to opt in to state financing district; find out if Ramp-up financing funds can

increase the attractiveness of the financing for Garfield County residents; make program available to residential customers in Garfield County.

- Work with Boulder, GEO, and Denver to possibly create an interim solution to address financing for businesses.
- Work with local banks, financing organizations, local revolving loan funds, GEO, Boulder and Denver on additional financing options: micro financing to cover smaller loans; revolving loan funds to cover upfront costs that will be reimbursed by rebates.
- Conduct follow up meetings with utilities (utilities were involved in initial Energy Challenge design) to engage them as partners on full neighborhood/business district retrofit plans and challenge ramp-up.
- Build on current relationships with chambers of commerce and partners in each community to plan and create infrastructure for county-wide competition between communities to be launched in the fall; set up strong communication networks to reach out to all chamber members in the region/ provide ongoing education, support and information.
- Develop additional sponsors of program to develop additional funding sources, incentive and prize money for countywide challenge.
- Develop competition guidelines, performance criteria for countywide challenge.
- Establish computer based Energy Center and energy management system to track progress and report on energy performance, follow through on ENERGY STAR ratings for town halls and schools in each community.
- Follow up on meetings already held with contractor community to ensure they are fully engaged in program, ready to respond to increased demand for services.
- Develop all marketing and communication materials for full rollout in the fall.
- Plan major kick-off event, with vendors, information and speakers.
- Energy Coaches (already helping some businesses through current small scale program) work with existing Challenge participants to work out all kinks, get ready to ramp up program.

**Phase 2: Countywide challenge/competition roll-out/mobilization (weeks 9 – 15)**

- Once financing programs and incentive packages are set up, follow through on current efforts to engage business districts, homeowner associations, neighborhoods and corporate-owned developments to sign on to the energy challenge.
- Launch residential energy challenge program in September, with active engagement of 3 school districts and students to link with households and work with businesses to provide incentives for their employees to participate.
- Launch challenge between chambers in region, encouraging highest participation rate of all chamber members.
- Hold fall kick-off event to publicize challenge.
- Encourage healthy competition between towns regarding how many businesses sign up, track signup rates and early results on Garfield Energy Center website.
- Work with local contractors (or trade allies) to publicize the program and direct their customers to participate, while also working with contractors to ensure they get the training they need to implement the energy conservation measures that are needed in both the residential and commercial programs.
- Utilize relationships with Chambers and other community groups to keep Energy Challenge and energy conservation tips at the forefront of regular communications and membership or community meetings.

- Create networks for participants, across residential and commercial sectors to share in successes and experiences.
- Garner publicity from case studies from 2009 pilot program in Glenwood Springs and early participants in 2010 to build momentum and convince the greater community of the potential savings.
- Finalize participation and logistics for participation of 2 full business districts and 3 neighborhoods.

**Phase Three: Full-on implementation of retrofits (week 15 through week 52)**

- Energy Coach team works with all participating households and businesses on step-by-step approach for saving energy and implementing improvements.
- Monthly tracking of participation rates and results to date.
- Energy Center/kiosk reporting on results, success stories.
- Monthly awards, incentives.
- Ongoing communication and marketing through chamber networks, schools, and participating sponsoring businesses.
- Ongoing tracking of results, fine-tuning and improvement.

**Program Name: EnergySmart for Commercial Buildings**

**Description:** The goal of the EnergySmart program is to stimulate investments in energy efficiency by commercial sector businesses.

**Implementation Strategy:** Through the EnergySmart program, Boulder County Public Health (BCPH) will design and implement a three-pronged approach to working with businesses in the city of Boulder and countywide: 1) provide energy information through geographically targeted “energy information sweeps”; 2) work with businesses to make their existing equipment more energy efficient; 3) provide rebate incentives and technical assistance to enhance investments in new energy efficient equipment. BCPH (consultants) with support from their subcontractors will perform the following tasks:

**EnergySmart Phase 1: Design, Plan, and Pilot (Plan Year One)**

- Key program components include:
  - EnergySmart Sweep – providing energy efficiency education to businesses
  - EnergySmart Tune-Ups – identifying opportunities to improve performance of existing equipment commonly used in city businesses.
  - Rebate and Efficiency Upgrades – providing financial and technical assistance
- Issue RFPs for Rebate Program, Technical Assistance (including Energy Sweeps and Implementation Assistance), Measurement and Verification, and an Enterprise Management System.
- Develop and finalize work plan with contractors.
- Work with social mobilization team to develop commercial campaign plan for 2010.
- Launch Phase I Rebate Program
- Design and pilot “Learn It” programs and Energy Sweeps, finalize strategy, and conduct two additional Sweeps
- Train Implementation Assistance staff
- Finalize strategy and implement one Small Building (Recommissioning) Tune-up
- Design, pilot, and finalize strategy for Refrigeration Tune-up program
- Design Air Compressor Tune-up program

- Design and launch Phase II rebate program
- Design and pilot Enterprise Management System custom features with contractor
- Begin Measurement and Verification program

### **EnergySmart Phase 2: Tune-up and Implementation Assistance Ramp-up (Plan Year Two)**

- Conduct additional Energy Sweeps.
- Conduct additional Small Building (Recommissioning) Tune-up Events
- Conduct additional Refrigeration Tune-up Events
- Pilot and finalize strategy for Air Compressor Tune-up program and conduct one Compressor Tune-up event
- Design Boiler Tune-up program
- Provide energy efficiency implementation assistance and rebates to businesses
- Conduct Measurement and Verification
- Publish Case Studies
- Design Phase III rebates
- Design Commercial Energy Conservation Ordinances (CECO) study and issue RFP

### **EnergySmart Phase 3: Implementation Assistance and Evaluation (Plan Year Three)**

- Conduct additional Energy Sweeps.
- Pilot and finalize strategy for Boiler Tune-up program and conduct Boiler Tune-up events
- Conduct additional Small Building (Recommissioning) Tune-up Events
- Conduct additional Refrigeration Tune-up Events
- Conduct additional Compressor Tune-up events
- Launch Phase III rebates
- Provide energy efficiency implementation assistance and rebates to businesses
- Conduct Measurement and Verification
- Publish Case Studies
- Implement CECO study
- Outreach to building officials on CECO
- Encourage adoption of CECO
- Analyze program results and integrate into ongoing program design
- Complete final report

## **Subtask 1.2 Social Mobilization**

### **Program Name: Social Mobilization**

**Description:** Boulder County will utilize a social mobilization approach to encourage participation from a wide variety of community networks such as churches, Boy Scout troops, neighborhoods, etc. Ongoing customer engagement offers an opportunity for the Energy Concierge/ Two Techs Program and the Commercial Energy Smart program to broaden customer base by requesting referrals, engaging social networks, sponsoring competitions, and other social networking strategies.

**Implementation Strategy:** The social mobilization scope of work in Boulder County will include the design and implementation of ongoing customer engagement strategies aimed at capturing new customers.

### **Social Mobilization Phase 1: Design (weeks 1 – 25)**

- Develop Request for Proposals in order to hire an organization to help design a comprehensive strategy to support grant goals and transform the market.

- Map social networks and community leaders across Boulder County in order to inform our social mobilization efforts.
- Develop key messaging and outreach strategies.
- Work across communities to develop a communication plan.

**Social Mobilization Phase 2: Plan and Pilot (weeks 20 – 45)**

- Use social mobilization proposal to launch outreach efforts.
- Provide information to network leaders.
- Host network and neighborhood social mobilization events to galvanize interest in programs.
- Communicate social mobilization plan to program managers.

**Social Mobilization Phase 3: Implementation and Evaluation (weeks 25 – 52)**

- Implement social mobilization efforts across social networks.
- Track program interest level and how participants heard about programs.
- Evaluate program and augment efforts based on customer feedback and evaluation.

**Task 2.0 Access to Services: Job Creation, Two Techs and a Truck, Whole-Neighborhood Retrofits**

**Subtask 2.1 Job Creation**

**Description:** Ensure that qualified contractors with a well-trained workforce will get the job done efficiently and effectively the first time in order to promote a positive public response and ensure against a negative reaction that would result from poor quality work.

**Implementation Strategy**

**Job Creation Phase 1: Design, Plan and Evaluation (weeks 1 – 52)**

- Expand and Train Workforce:
  - Partner with businesses/organizations that have a training expertise and/or a network of contractors and with workforce agencies to access local labor.
- Develop Qualified Contractor Database:
  - Building off of the GEO’s efforts we will develop a list of qualified contractors to support the grant funded programs;
  - We are exploring partnerships with Change to Win, Boulder County Workforce and others to train and certify workers in the new energy economy.

**Subtask 2.2 Two Techs and a Truck**

**Program Name: Two Techs and a Truck**

**Description:** The 2TT program seeks to overcome traditional barriers to consumer investment in energy efficiency by converting audits to action through focused, one-on-one assistance and by leveraging available financial incentives and support. The Two Techs and a Truck program will coordinate with the Energy Concierge service.

**Implementation Strategy**

**Two Techs and a Truck Phase 1: Design (weeks 1 – 25)**

- Develop Request for Proposal for vendor/contractor to implement Two Techs and a Truck Program. (This contractor may be the same as our Energy Concierge Program Administrator depending on the proposals received).
- Current key program components include:

- **Customer intake:** Customers are able to initiate participation through an on-line tool or by contacting the program call center. Social mobilization efforts lead to customer intake.
  - **Prescreening:** The program will use a screening approach to route customers to the most appropriate program delivery track.
  - **Scheduling:** Dedicated call center staff will schedule an initial visit from a qualified energy auditor and/or energy concierge according to the customer's needs.
- **Audits and Direct Installation Measures:** The program offers two basic types of energy audit (Comprehensive & Walk Through). Both audit types are supported by an energy concierge who is in charge of the direct measure installs and homeowner education.
  - **Comprehensive:** The program will seek to direct the majority of participants into a full comprehensive audit with diagnostic energy and safety testing. Qualified energy auditors will conduct audits and generate a straightforward report highlighting the most cost effective energy efficiency opportunities and providing details on environmental and financial metrics for measure-specific or bundled energy upgrade packages.
  - **Walk through:** A visual inspection and walkthrough audit will be provided for customers in newer homes, tenants in rental housing not covered by SmartRegs, and others where the building or other factors do not justify the cost of a comprehensive audit. Participants in walkthrough audits will receive a brief audit report highlighting all findings and recommendations as well as direct installation measures and education.
  - **Direct Installs:** Every audit visit in the 2TT program will include some level of direct measure installation by the energy concierge. The cost of the direct install measures will be rolled into the audit cost by subsidized by County funds. Based on an analysis of the costs, energy savings and GHG emissions reduction potential, the following measures offer the greatest benefit and will be available with each energy audit.
    1. **CFLs:** up to 20 per home
    2. **Low-flow showerheads:** one per every four residents
    3. **Smart Strips** with customer approval and \$15 co-pay
    4. **Up to four faucet aerators**
    5. **One water heater insulation blanket per water heater**
    6. **Up to six feet of water heater pipe insulation**
    7. **Programmable Thermostats**
    8. **Air sealing:** The Energy Concierge works with the energy auditor to identify the most egregious leaks and spends up to 30 minutes sealing.
- **Energy concierge:** Every audit will also include support from an energy concierge. During the audit, the concierge's role is to install low cost measures, provide education resources, and help the homeowner understand audit results and recommendations. Following the audit, the concierge will assist homeowners to move from audit to action, helping them fill out rebate and incentive paperwork, explaining financing options, connecting homeowners with installation contractors, and providing other services to facilitate the installation of energy efficiency measures.
- **Measure Installation:** The program focuses on insulation and air sealing measures, providing a variety of services to streamline implementation and help homeowners move from audit to action. However, the program also supports additional measures.

- **Insulation and air sealing:** Where it is recommended, the 2TT audit will generate a work order for insulation and air sealing at the time of the audit, which, once signed, will trigger a call from an assigned insulation contractor to schedule the installation work.
- **Equipment and other measures:** The program will support additional measure installations by providing customers with lists of approved contractors, assistance in filling out rebate forms, financing, and quality assurance.
- **Ongoing Engagement:** After initial installations, the program will continue to engage participants, including activities such as continued installation support, reminders about behavioral and retrofit recommendation, and electronic alerts to re-engage participants.
- **Financial Incentives:** The program will work to keep customer costs down and help them achieve positive cash flow on their energy investments using subsidies and rebates, tax credits, and financing. An overarching objective is to achieve a long-term transition to self sustaining programs.
  - **Rebates and subsidies:** The City and County will subsidize the program to keep customer's participation costs low and value high. The program also will maximize its budget and customer benefits by leveraging incentives and rebates through Xcel Energy and other sources.
  - **Tax credits:** The program provides direct support to help customers understand available incentives and access appropriate forms and other information available from the federal government.
  - **Financing:** The program offers year round micro loans and semi-annual Property Assessed Clean Energy (PACE) loans through the ClimateSmart Loan Program (CLSP). Additional financing options may be considered to meet demand as the program ramps up.

### **Two Techs and a Truck Phase 2: Plan and Pilot (weeks 20 – 45)**

- **Program Administration:** The program will be supported by one or more administrative contractors to help provide the structure and systems necessary to deliver services at the volumes needed for the City and County to meet their participation and GHG goals.
- **Quality Assurance/Quality Control:** The program regulates quality at the front end by requiring, verifying, and maintaining certification, training and other quality standards for its participating audit and installation contractors and at the back end through random, sample based site inspections and process evaluation activities. Contractors who do not meet set program standards will be disqualified from participating.
- **Social mobilization:** The program will utilize a social mobilization approach to encourage participation from a wide variety of community networks such as faith-based organizations, Boy Scout troops, neighborhoods, etc.

### **Two Techs and a Truck Phase 3: Implementation and Evaluation (weeks 25 – 52)**

- **Conduct Two Techs Program with X households.** (*We will have this number by June 14<sup>th</sup>*).
- Deliver follow up assistance to participating customers.
- Monitor and verify energy efficiency equipment installations.
- Provide recognition to participating homeowners and further drive program demand.
- Work with utility and other partners to provide education and assistance to energy efficiency trade ally's including.
- Track program success through customer management system and provide feedback to program managers.

### **Subtask 2.3 Whole-Neighborhood Retrofits**

**Description:** Boulder County has observed that efforts to increase energy efficiency within a community often produce economies of scale and critical mass. For instance, an insulation project completed by one neighbor or member of a social network spurs other activity on the block or within the group, creating a chain reaction. This program is designed to work within neighborhoods and social networks to harness that chain reaction and achieve better rates of penetration. In addition to the energy efficiency benefits of retrofitting homes and businesses, whole-neighborhood and social network approaches to EE promote effective use of funding by leveraging economies of scale for labor, transportation and communications strategies.

**Implementation Strategy:** The energy concierge including Two Techs and a Truck will focus on providing technical assistance and social mobilization marketing in targeted Boulder County, Denver County and Garfield County neighborhoods.

## **Task 3.0 Access to Capital: PACE Programs, Statewide Debt Service Reserve Fund, Microloans, Rebates**

### **Subtask 3.1 Pooled fund in support of finance programs**

**Description:** Boulder County will establish a pooled fund for the primary benefit of grant partners and other regional or statewide programs, as appropriate, that support the goals of the grant. Funds will be prioritized for use by the grant partners, but will also be available for regional and statewide programs that assist in achieving the grant goals, as appropriate.

**Implementation Strategy:** The pool of funds will be available for all grant partners to support the grant goals. Funds may be used as debt service reserve, loan loss reserve, other credit enhancements and otherwise to support the financial program efforts. In Boulder County's local experience, these types of funds can achieve a leveraging of 20 to 1. However, different program elements may be above or below that average.

#### **Pooled Financing Phase 1: Design (weeks 1 – 25)\***

- Determine impacts to ClimateSmart Loan Program based off of federal banking regulations.
- Continue to modify existing ClimateSmart Loan Program to follow federal guidelines.
- If existing program does not continue, develop alternative financing structure for loans over \$3,000.

\*Please note: We have not fully developed the implementation plan for pooled financing as we are waiting for federal and industry guidance and/or clarification that could significantly impact our program plans.

### **Subtask 3.2 Microloans (Boulder County)**

**Description:** Currently no financing is available for EE retrofits from \$500 to \$3,000. This pool will enhance program uptake by establishing financing for property owners to implement small retrofit projects that would not otherwise be implemented because of lack of financial resources.

**Implementation Strategy:** Offer small energy efficiency retrofit project loans, ranging from \$500 to \$3,000, to residents and businesses in Boulder County, primarily through the energy concierge and two techs programs. Through the issuance of short-term microloans provided through convenient mechanisms, this program will increase uptake of efficiency efforts, provide a revolving pool of funds, and drive the market. The program will serve as a pilot for project partners as well as nationally.

### **Micro Loans Phase 1: Design (weeks 1 – 25)**

- Key Program Elements Include:
  - An in-house Boulder County managed program that offers zero interest unsecured loans to residents/businesses wanting to undertake energy efficiency projects in the \$500-\$3,000 range.
  - Easy application process with limited underwriting criteria
  - Quarterly statements with a 3 year maximum payback time.
  - No credit checks for potential participants.
  - Application and administration fee to cover cost of program.
  - Drive demand through the Energy Concierge/Two Techs and a Truck programs and catalyze support for program through social mobilization efforts.
- Decide whether to offer micro-loans to Energy Concierge/Two Techs participants only.
- Design an adequate customer application that can be easily completed and submitted (online and over the phone) – this could be a simple spreadsheet that we then enter into our system but it would give the customer flexibility.
- Create or purchase simple loan administration software for loan tracking and servicing.
- Create a smaller list of eligible measures that homeowners/businesses may invest in with a focus on energy efficiency measure such as whole house air leakage sealing and insulation.
- Design exact plan regulations (fee amount, payment period and frequency, homeowner/business qualifications).
- Draft closing process and implications for late payments and delinquencies.
- Establish prepayment policies.

### **Micro Loans Phase 2: Plan and Pilot (weeks 20-45 )**

- Work directly with energy concierge and two techs program to create awareness of financing availability for eligible measures.
- Integrate microloans into action plan associated with energy concierge.

### **Micro Loans Phase 3: Implementation and Evaluation (weeks 25 – 52)**

- Continue to work directly with energy concierge and two techs program to create awareness of financing availability for eligible measures.
- Monitor funds spent and funds leveraged.
- Provide quarterly statements for paybacks.

### **Subtask 3.3 Rebates**

**Description:** This element will support high initial uptake and increase acceptance of energy efficiency measures as a community benefit, build markets, and support adoption of codes and regulations. Our commercial and residential programs will offer rebates to support program uptake in a way that supplements and fills gaps in relation to utility rebates. Rebates will include a connection to regulatory actions and a focus on moderate and low-income populations and multifamily units. Rebates will be steeply tapered down after years one and two. Rebates will also be leveraged into measurable energy efficiency improvements in partner communities.

**Implementation Strategy:** Please note: The commercial rebate program is integrated into the commercial EnergySmart Program and the residential Energy Concierge and Two Techs and a Truck Program detailed above.

### **Rebates Phase 1: Design (weeks 1 – 25)**

- Design key rebate program elements with Retrofit Ramp up Partners.
  - Determine rebate types and incentives.
  - Determine eligibility and qualifications of rebates.
    - Determine rebates for type of building (multifamily, rental property units, single family)
  - Determine gaps in local utility rebates and develop rebates that fill these gaps.
  - Create customer friendly rebate application process.
  - Update a list of rebates available across various entities (local, utility, state, federal).
- Draft RFP for contractor/vendor to process all residential and commercial rebates.
- Hire vendor to process rebates.

### **Rebates Phase 2 & 3: Plan & Implement (weeks 20-52 )**

- Track rebate monies spent and source of rebates.
- Continue offering residential and commercial rebate assistance.
- Build Rebate Partnerships:
  - In effort to leverage funds and provide more equitable incentives to residents and businesses, Boulder County will develop a partnership model to support the efforts of local utilities, governments, and community/nonprofit organizations.
  - Boulder County expects that the impact of this partnership model will be most noted on the application reservation, and verification, data entry and management and the final check writing processes. The database management system or approval process must make these calculations, without error, for each and every rebate awarded.

## **4.0 Replicate Program Success: Coordinate and Deliver Training Activity Statewide**

**Description:** The Metro Mayors Caucus and DRCOG (MMC/DRCOG) will facilitate the replication of the Denver and Boulder County programs throughout the region. Through electronic communication and a central website, nonprofit partners will be supported by – and support – partner activities, and enable replication in other communities. All education and outreach activities will be coordinated among the partners through web-based communication and will reflect input from other community stakeholders.

**Implementation Strategy:** MMC/DRCOG will provide workshops and support in addition to education and outreach. MMC/DRCOG is planning 5 workshops the first year, 4 in year 2, and one large summit in year 3 that will focus on best practices and lessons learned.

### **Replicate Program Success Phase 1: Design (weeks 1 – 25)**

- Work with key stakeholders and program partners to define goals and metrics.
- Develop workshop materials and workshop topics.
- Create list of potential attendees.
- Identify workshop locations, agendas, speakers and other logistical details.
- Create workshop budget.
- Draft outreach materials and resource support materials for other communities.
- Advertise workshops and create key messages.
- Create assessments or evaluations in order to measure workshop success.

### **Rebates Phase 2 & 3: Plan & Implement (weeks 20-52 )**

- Provide 2 workshops in the fall of 2010 and 3 in the spring of 2011.
- Deliver educational materials and resource support to key stakeholders and other communities.

## **5.0 Project Management and Reporting**

**Description:** Boulder County will track and document project achievements and accounting of grant funds through an enterprise management system as well as a customer management system.

**Implementation Strategy:** Project staff will track outcomes, outputs and expenditures and insure the project is attaining goals and objectives within the projected timeline.

### **Project Management and Reporting Phase 1: Design (weeks 1 – 25)**

- Boulder County is currently drafting an RFP to solicit vendors to develop a tracking, analysis, reporting and integrated data management system. Through this vendor, Boulder County aims to develop a web-based database platform that will allow for the recording, tracking, analysis, and reporting of utility data and project information for our commercial and residential programs.
  - Develop an enterprise management systems and a customer management system that will track all residential and commercial programs.
    - Draft request for proposal for EMS and CMS.

### **Project Management and Reporting Phase 2: Plan and Pilot (weeks 20-45 )**

- Create and generate reports detailing energy usage, cost and greenhouse data for individual and aggregated businesses and residential properties.
- Create and generate reports detailing program data including but not limited to the number of units served, audits and installs completed, estimated, actual and potential energy and cost savings per program, percentage of program uptake, cost of average project and monies leveraged, number of rebates invested.
- Utilize reports to inform governance team of program success in quarterly meetings.
- Utilize reports to inform DOE reporting requirements.

### **Project Management/Reporting Phase 3: Implementation and Evaluation (weeks 25 – 52)**

- Continue tracking and reporting using enterprise management system.
- Utilize reports to evaluate program success and inform program managers of monthly achievements.
- Create graphics and materials that show the success
- Share success with community networks, media outlets and the DOE.