Agenda

- National Better Buildings Neighborhood Program
  - Brief Overview & Results
  - Data releases (first webcast July 9, 2014)

- Program Legacies:
  - Program Experiences & Lessons Learned
  - Better Buildings Residential Program Solution Center
    - Learn about >1,000 program examples
    - Start using now: become a beta user
  - Better Buildings Residential Network

- Q&A throughout
Better Buildings Neighborhood Program

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

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

41 grants: $1.4M - $40M each
Timing: mid-2010 through late 2013

www.betterbuildings.energy.gov/neighborhoods
## All Goals Met!

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

**BBNP Data Summary (through 9/30/2013)**

<table>
<thead>
<tr>
<th></th>
<th>Assessments</th>
<th>Upgrades</th>
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<tbody>
<tr>
<td><strong>Residential</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Single-Family</td>
<td>138,323</td>
<td>74,680</td>
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<tr>
<td>Multi-Family Units</td>
<td>84,476</td>
<td>21,330</td>
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<tr>
<td><strong>Commercial</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Buildings</td>
<td>7,323</td>
<td>3,547</td>
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<tr>
<td><strong>Industrial</strong></td>
<td></td>
<td></td>
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<tr>
<td>Buildings</td>
<td>36</td>
<td>15</td>
</tr>
<tr>
<td>Agriculture</td>
<td>276</td>
<td>163</td>
</tr>
</tbody>
</table>

**Source Energy Savings (MMBtu/yr)**

- **Assessments & Upgrades**
- **Residential Single-Family**
- **Residential Multi-Family Units**
- **Commercial Buildings**
- **Industrial Buildings**
- **Agricultural Buildings**

More than 80 million square feet of commercial bldg. space upgraded!
Sizable Data Sets Will Be Available

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

www.betterbuildings.energy.gov/neighborhoods
BBNP Independent Evaluations

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

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

[www.betterbuildings.energy.gov/neighborhoods](http://www.betterbuildings.energy.gov/neighborhoods) → Tools & Resources → Program Evaluation
Legacies of Better Buildings Neighborhood Program
Program Experiences & Lessons Learned
BBNP Commitment to Learning & Sharing

1. **Planning**
   - Clarify What We Need to Know

2. **What We Know Now**
   - Website
   - Case Studies
   - Program Guides & Templates

3. **Data Collection**
   - Quantitative (reporting)
   - Qualitative (account management, peer exchange calls, Google Site forum, workshops)

4. **Analysis & Evaluation**
   - Review & Revise What We Know
     - Quantitative
     - Qualitative
     - Formal Evaluations

**Solution Center**
- Step-by-step guidance
- Options
- Examples
- Tools
- Templates
- Promising approaches, lessons learned, best practices
Components of an Effective Residential EE Program

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

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

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

- The EnergySmart program in Boulder County, Colorado, found that having an energy advisor assigned to each program participant through the home energy upgrade process was a key to program success. Energy advisors built trust with the customer during an initial home visit and maintained a one-on-one relationship with homeowners throughout the process. The relationship endured even after the upgrade; energy advisors remained available to discuss future home upgrades. Two-thirds of customers rated their energy advisor as professional, knowledgeable, and helpful, and they said they would recommend the program to others. “The program was worth my time and effort.” In Boulder, around 60-70% of homeowners used the EnergySmart program to upgrade their homes.
- Energy advisors for the Greater Cincinnati Energy Alliance (GCEA) provided a personal touch to the upgrade process, from requesting an assessment to hiring contractors. The program found that these advisors made potential customers more comfortable with the program and more willing to let them in their homes.
- Energy advisors for Clean Energy Works Oregon (CEWO) provided personalized assessments—and also checked the quality of assessments. CEWO’s advisors were able to identify and resolve problems or delays and prevent them from derailing projects. The personalized approach was appreciated by customers, with 75% of those surveyed saying they appreciated having a personalized and customized experience.
- The Denver Energy Challenge provided customers with free energy assessments to help facilitate energy efficiency improvements. Starting with an initial assessment, participants had access to a variety of financing options, found qualified home improvement contractors, and consulted with qualified residents with other free or subsidized energy improvements. The program’s client intake, database system incentives, and contractor management support, three out of every four customers who worked with an energy advisor.

What Makes the Advisor Model Work?

Great Advisors

Marketing & Outreach

Client Intake, Database System Incentives, Contractor Mgmt
Evaluation & Data Collection

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

Invest in information technology systems

Paper-based or spreadsheet-based information collection processes can be labor-intensive and may become cumbersome to aggregate and store the data from many sources, especially when trying to ensure data quality and consistency. However, investing time and resources to thoughtfully plan a data collection, transformation, and collection system was well worth the effort.

- Garfield Clean Energy in Garfield County, Colorado, at first used a series of spreadsheets to collect data from participants, their energy upgrades, and measures, and resulted in energy savings. However, the process realized that spreadsheets did not offer the level of sophistication needed for their work. They explored several online relationship management systems and identified several potential systems that could track building and energy data, energy audits, and provided real-time access to their energy savings. The customization and data entry work, which took months with the selected system, led to create detailed reports based on a wide variety of reporting parameters.

- Clean Energy Works Oregon (CEWO) scaled their pilot program and realized that a comprehensive solution was needed to meet the demands of funding agencies, media requests, and preparation of reports. CEWO worked with a software company to develop a unified and intuitive process from application to completion. The software platform provided a way to track progress, milestones, and revenue, while enabling stakeholders to track data easily.

In Boulder, Colorado, the Energy Smart program used spreadsheets to track data. As the program expanded under the Better Buildings Neighborhood Program, a more user-friendly, real-time, cloud-based IT system for tracking customers and进度 was needed. This system can be used to track customers as they upgrade and the system can be accessed in the field by EnergySmart Energy Advisors. This system allows for tracking of many metrics in a much more consistent, accurate, and efficient manner.

By adopting an IT system, CEWO was able to track data effectively and efficiently, allowing stakeholders to make informed decisions and measure progress accurately.
## Marketing & Outreach

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

Make upgrade benefits visible by showcasing completed projects and actual results

Unlike remodeling projects, home energy upgrade benefits are generally not easily visible. Showing how upgrades work can help increase understanding and motivation with potential home owners. Programs have successfully used house parties and demonstration homes to show the results of upgrades to potential customers. In some cases, the hosts of these events have been interested in participating in the program to leverage word-of-mouth marketing from trusted sources.

• Through a one-year “house party” initiative, Energy Impact Illinois worked with neighborhoods to host more than 650 house parties, which led to more than 3,000 Chicago homeowners, neighbors, and friends learning about energy efficiency upgrades. Participants were invited to a home energy assessment demonstration on the home owner’s home, and the homeowner’s neighbors were able to sign up for their own assessment and upgrades. Program administrators estimated that more than 900 house party participants completed upgrades for their own homes.

• The California Center for Sustainable Energy, which manages a residential energy upgrade program in San Diego, partnered with municipalities to conduct “home tours,” which successfully promoted both energy assessments and upgrades for customers. Participants were guided through their homes by contractors who performed them. During the tours, neighbors heard testimonials from demonstration homeowners, took a firsthand look at contractors’ work, and learned about available incentives. Between January 28 (when the initiative was launched) and April 28 (when the initiative ended), 250 participants signed up for an energy assessment with a contractor.

• NOLA WISE (New Orleans, Louisiana, Worthwhile Investments Save Energy) launched its Homeowner Showcases. NOLA WISE organized and promoted the showings, which included completed home energy upgrades. The NOLA WISE team and contractors helped attendees understand how to make their own homes more comfortable and energy efficient, and educate attendees on how to make their own homes more comfortable. Attendees were motivated to complete energy assessment requests in neighborhoods where those events were held.

Energy Impact Illinois Learns That Parties Sell Upgrades

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

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

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

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

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

Which homeowners and homes were targeted?

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

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

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

Many programs quickly realize that access to low-cost financing for home energy upgrades is crucial. The primary barrier to energy efficiency adoption is often low customer demand for upgrades. Program partners that achieved successes in loan volume promoted access to low-cost financing as part of a broader effort to sell homeowners on the benefits of energy efficiency. Approximately 15-20% of Better Buildings Neighborhood Program participants obtained a loan product. For example, the Better Buildings Neighborhood Program in Cincinnati offered a loan product by offering competitive interest rates and efficient loan approvals.

With the Greater Cincinnati Energy Alliance (GCEA) began its program in 2011, there were several key lessons learned:

- **Experience the benefits**

- **Adding Comfort by Stopping Drafts**
  For many homeowners, it can be difficult to maintain a constant temperature throughout the home. Whether it is improving the cold room next to the garage in the winter, or the humid second floor during the warm summer months, the Energy Alliance can help.

- **Energy Savings**
  The Home Energy Assessment identifies where your house is wasting energy and provides a road map for energy savings, starting with those measures that have the highest impact per dollar.

- **A Healthy, Safe Home**
  Your Home Energy Assessment includes health and safety testing of your combustion appliances. These tests ensure your combustion appliances (such as furnaces, hot water heaters, and stoves) are functioning efficiently and not leaking harmful carbon monoxide or natural gas into your home.

- **Improving Outdated Equipment**
  Old, inefficient furnaces, air conditioners, and hot water heaters significantly add to a home’s energy use. The Energy Alliance can work with you to replace outdated mechanical equipment with new high-performance models.

- **Reducing Air Pollution**
  During the hottest days of summer, our air conditioners work hard to keep our homes cool. By using high-efficiency cooling systems, adding insulation, and eliminating drafts, you can retain the comfortable, conditioned air in your home. This puts less of a strain on our power grid and helps us all breathe a bit easier during the hottest and most humid months of the year.

- **Green Jobs**
  The Energy Alliance works with small businesses and workforce development agencies to train building professionals and create new jobs in the region. By making Cincinnati a leader in energy improvements, we can create a vibrant local green economy.

We have loans to fit your needs

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

**Loan Features**

- **3, 5, or 10 Year Loan Term**
- **$1,000 to $20,000 Loan Amounts**
- **Energy Star® Equipment**
- **Fixed Monthly Payments**
- **No Prepayment Penalty**

**Improvement Specific Loan**

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

- **9.99% APR**
- **Energy Assessment Required**

**Whole Home Loan**

Maximize your savings when you take a whole home approach.

- **6.99% APR**
- **Energy Assessment Required**

Learn more...
### Contractor Engagement & Workforce Development

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

Contractors are your sales team – educate and empower them with the skills to market your program. Many home performance programs have confronted the challenge of generating interest and converting that interest into completed upgrades. Recognizing that the contractors form the backbone of the program, some Better Buildings Neighborhood Program partners have invested in workforce development through co-marketing and sales training.

Programs have found that offering sales training to home performance professionals is effective. Through monthly webinars and professional development, contractors have been engaged in targeted communication and selling program options, ensuring a high conversion rate.

- **Efficiency Maine** boosted conversion rates with a sales training program, which effectively converted leads into customers. Through monthly webinars and professional development, contractors have been engaged in targeted communication and selling program options, ensuring a high conversion rate.
- **Energy Upgrade California in Los Angeles County** provides marketing materials for contractors, especially those with limited budgets. Contractors are typically located in centers with customizable marketing kits for contractors. Frequent marketing materials are available for contractors, and their efforts help contractors with minimal budgets.

**Key Takeaways**

- **Make sure contractors have the tools 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**.

**Spotlight on Maine: Contractor Sales Training Boosts Energy Upgrade Conversions**

When Efficiency Maine launched a new residential energy retrofit 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 expecting 10,000 leads through its call center and website. 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 sales with homeowners, Efficiency Maine’s assessment to upgrade conversions in the program increased from 10% to 69%.

Multiple approaches have assisted contractors in successfully selling home energy upgrades in Maine. Efficiency Maine has provided dedicated sales training, which contractors are standardized assessment checklists to help them communicate with homeowners, engage with other professionals, and coordinate professional development courses for contractors.

**Tailor Sales Training to Fit Energy Professionals**

In summer 2013, program managers began phasing contractors on a call to identify the disconnect between leads and upgrades. As a result, gaining a critical insight, many homeowners were not upgrading their homes. The home performance contractors were focused on demonstrating how the building science experts, using technical language to describe the energy efficiency issues, they wanted to train the homeowners in the home. Completing the training program involved homeowners, defining their understanding of upgrades and developing the sales process. While program staff provided contractors with technical training, they realized that the contractors needed better training and tools to communicate effectively with homeowners.

In August 2013, Efficiency Maine decided to offer sales training to its participating contractors, as an approach to addressing the low conversion rates. The program conducted a nationwide search and selected Carnegie Training, a professional skills training program with a strong presence in Maine. Recognizing that contractors did not want to think of themselves as salespeople, Efficiency Maine collaborated with Carnegie Maine to customize its training model into a two-day course that blends selling
Better Buildings
Residential Program Solution Center

Overview
Framework
Examples
Next Steps
Helping Programs & Their Partners

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

March - November 2012: Framework Development, Review, Consultation
Reviewed DOE guides, external literature, BBNP workshops and peer calls; vetted with stakeholders

June - July 2012: Feedback from Key Partners & Intended Users
Feedback from EE NGOs and programs, identified complementary work, REES conference input and ideas

July - October 2012: Drafted and Vetted Lessons Learned
Based on experience from 2 yrs of BBNP workshops and peer exchange calls, Now = Tips for Success

November 2012 - April 2013: Platform Development
Built platform, designed content format, developed selection of handbooks

April 2013 - April 2014: Content and Functionality Development (1st release)
All handbooks complete, additional Solution Center functionality developed

May 2014 – September 2014: 1st Release Available During Peer Review & Beta Testing
Tips for Success enhanced, content & function vetted by external peer reviewers; beta users test all aspects

Fall 2014: Public Launch (2nd release)
All content and functionality in place; ready for user submissions
Solution Center Development Team

Content Development

- Market Position & Business Model
  - Subid Wagley (DOE)
  - Athena Bertolino (Ross Strategic)
  - Rebecca Foster (Vermont Energy Investment Corporation)

- Program Design & Customer Experience
  - Megan Billingsley (Lawrence Berkeley National Laboratory)
  - Tom Beierle (Ross Strategic)
  - Richard Faesy (Energy Futures Group)

- Evaluation & Data Collection
  - Dale Hoffmeyer (DOE)
  - Stacy DeGabriele (Eastern Research Group, Inc. - ERG)
  - Nikki Kuhn (Vermont Energy Investment Corporation)

- Marketing & Outreach
  - Jonathan Cohen (DOE)
  - Kathleen Brady, Shannon Johnson (ERG)

- Financing
  - Steve Dunn (DOE)
  - Charlie Goff (ERG)
  - Matthew Brown, Dave Carey (Harcourt Brown & Carey)

- Contractor Engagement & Workforce Development
  - Megan Billingsley (Lawrence Berkeley National Laboratory)
  - Jennifer Tice, Darcy Peth (Ross Strategic)
  - Mike Rogers (OmStout Consulting)

Editors

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

Platform Development

- Chrissi Antonopoulos (Pacific Northwest National Laboratory - PNNL)
- Michael Baechler (PNNL)
- Linda Connell (PNNL)
- Julia Walker (PNNL)
Guidance and Examples Based on Evidence

Evidence Progression

- Innovation
  - Other websites
- New, relatively untested
- Promising Approach
  - Step-by-Step
- Lesson Learned
  - Tips for Success & Step-by-Step
- Qualitative data & multi-source anecdotal evidence
- Mature, fully supported, multi-source quantitative evidence
- Best Practice
  - Coming in 2015
What You Are About to See

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

Version 2 (full) release expected in Fall 2014
Solution Center Home Page

Better Buildings Residential Program Solution Center

Explore Program Design Phase Resources
- Strategy Development
- Planning
- Implementation
- Evaluation

Popular Handbooks

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

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

Most Popular Handbooks
- Market Position & Business Model – Overview
- Financing – Overview
- Program Design & Customer Experience – Overview
- Market Position & Business Model – Assess the Market

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

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

- **Planning**
  - Develop Implementation Plans
  - Develop Evaluation Plans

- **Implementation**
  - Develop Resources
  - Deliver Program

- **Evaluation**
  - Assess & Improve Processes
  - Communicate Impacts
**Description**

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

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

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

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

**Key Resources**

- **DOE Guidelines for Home Energy Professionals** include standard specifications for quality work, critical tasks and core competencies for effective training programs, and a framework for professional certifications. The website includes job task analyses that describe the tasks and skills needed for specific jobs, information about accredited training programs, downloadable training modules, and other resources.

- **DOE Building America Solution Center** provides home performance professionals with building science resources, integrated energy efficiency tools, case studies, and best practices designed to dramatically reduce energy use in new and existing homes. This website includes expert information on hundreds of high-performance design and construction topics, including air sealing and insulation, HVAC components, windows, indoor air quality, and more.
Handbooks – Step-by-Step

Step-by-Step: Detailed what and how information

Market Position & Business Model – Assess the Market

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

- Assess potential market demand for energy efficiency products and services
- Assess how the market is already being served by other organizations—and what gaps exist for your organization to fill
- Assess your strengths and capabilities to provide products and services in the market

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

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

### Program Design & Customer Experience – Overview

#### Tips for Success

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

- **Make upgrade options clear and concise for customers**

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

- **Austin Energy** developed a form to estimate energy savings using a point system that contractors could use with residents during a home assessment. The form helped contractors and customers quickly determine which measures would achieve 15% energy savings in the home. Texas A&M’s Energy Systems Laboratory validated the point system for the program to ensure its accuracy and integrity. The program found that this streamlined approach was appealing to customers and contractors.

- **Los Angeles County’s Energy Upgrade California** implemented the Flex Path program that used a point system to show the energy savings from a menu of energy upgrade measures. To be eligible for program rebates, residents then selected which measures they would like to undertake that would total over 100 points and achieve 15% energy savings.
Tips for Success

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

Expand All

Adapt messages to your primary target audience’s needs

In Their Own Words: Benefits of Market Segmentation


In Their Own Words: Messaging to Motivate

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

### Financing – Communicate Impacts

#### Examples

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

### Case Studies

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

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

With its Best Offer Ever promotion, Austin Energy completed comprehensive energy upgrades in 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 and 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 inspections, improvements, and loan origination, while learning valuable lessons along the way.

**Using Credit Enhancements to Leverage Existing CDFI Capacity: Indianapolis**

**Author**: Lawrence Berkeley National Laboratory  
**Publication Date**: 2012

Highlights the EcoHouse Project Loan Program, which provides fixed interest rate financing for energy improvements in single-family homes that are otherwise unlikely to be market rates.
Handbooks - Toolbox

Toolbox: Templates, forms, tools, calculators

Evaluation & Data Collection – Conduct Evaluation

Toolbox

The following resources are available to help design, implement, and analyze your project. These resources include templates and forms, as well as tools. The Toolbox endorses these materials.

Templates & Forms

Los Angeles County Energy Issues Phone Survey (104 KB)
Author: Los Angeles County, California
Publication Date: 2011
Sample script Los Angeles County used to survey homeowners about energy issues.

Connecticut Workshop Survey (70 KB)
Author: Connecticut Neighbor to Neighbor Energy Challenge
Publication Date: 2011
Short survey for Connecticut's Neighbor to Neighbor Energy Challenge, designed to capture demographic information about participants.

EnergySmart Residential Survey (81 KB)
Author: Boulder County Energy Smart
Publication Date: 2013
Example survey about a homeowner's experience with EnergySmart in Boulder County, Colorado.
Topical Resources: Presentations, publications, webcasts

Topical Resources
The following resources provide additional topical information related to this handbook, which include presentations, publications, and webcasts. Visit Examples for materials from and about individual programs.

Topical Presentations

The Contractor-Participation-Inducing Home Performance Program
Author: Mike Rogers; OmStout Consulting, LLC
Publication Date: 2012
Presentation summarizing the important elements necessary to implement successful home performance programs.

Five Steps to a Profitable Contractor Base
Author: Courtney Moriarta; SRA International; Inc.; Emily Compagno; Building Performance Institute; Brad Geyer; Fayette County, Department of Labor; Sam Flanery; Building Science Academy
Publication Date: 2012
Presentation on five steps to building a profitable contractor base, including administration, certification and credentialling, commercial vs. trade, and training and sales support.
Program Design & Customer Experience – Make Design Decisions

**Description**

Successful energy efficiency programs address market opportunities and challenges of their local market. Programs that are likely to succeed aren’t those that pick a random energy efficiency option. Instead, you should develop a coordinated set of elements that are designed to overcome multiple market barriers and ensure the greatest fit of your program to your local context. For example:

- **Your market assessment**, which identified needs and potential markets. Your program will be designed to seize these opportunities and overcome the barriers to adopting energy efficient solutions.
- **Your program goals and objectives**, which define what your program seeks to achieve.
- **Your partners**, who will help you deliver the program. This includes an understanding of local contractors and their capacity as well as local utilities.

If your organization has a **business plan**, you will make many of these types of planning decisions as you develop your program design. If your organization does not have a business plan, you will make many of these types of planning decisions as you develop your program design. A business plan typically describes your organization’s:  

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**Where Am I?**

**How the handbook fits into the Solution Center**

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Handbooks – Where Am I?
Click the heart to add content to My Favorites

Add a new Favorites Folder

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

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

Market Position & Business Model – Overview

Quick Links

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

- Business Models for Providing Energy Efficiency Services
  Every organization or business has a particular set of motivations and revenue-generating opportunities that comprise their business model. Typical business models for providing energy efficiency services may be implemented by utility and non-utility program administrators, remodelers, HVAC (heating, ventilation, and air conditioning) contractors, home performance contractors, home inspectors, utilities, energy service companies, etc. Options to include are service bundling and sale, management of utility and non-utility programs, and customer sales or energy management.

- Cost-Effectiveness Tests
  Cost-effectiveness tests compare the benefits of a utility or non-utility program to the costs of implementing energy efficiency with its associated costs. The five most common tests used by public utility commissions to determine if a program should be supported are the payment-in-kind test (PCT), the utility/program administrator cost test (PACT), the ratepayer impact measure test (RIM), the total resource cost test (TRC), and the societal cost test (SCT).

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

- Policies and Regulations Impacting Energy Efficiency Programs
  Policies and regulations, such as energy efficiency targets, utility cost-effectiveness tests, financial regulations, and others, influence how your organization provides energy efficiency services.
Better Buildings Residential Program
Solution Center
Examples
Example #1 (1 of 5)

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

Description

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

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

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

Recruiting, developing, and maintaining enough contractors to work with your program requires ongoing effort. Leading
Example #1: Contractor Engagement Overview (2 of 5)

Contractor Engagement & Workforce Development – Overview

Step-By-Step

The following steps list important activities for Contractor Engagement & Workforce Development. Contractors need to take into account the unique requirements of each step to access its handbook.

1. **Assess the Market**
   - Assess the quantity and capacity of available contractors.

2. **Set Goals & Objectives**
   - Establish specific and measurable goals for contractor engagement.

3. **Identify Partners**
   - Establish relationships with contractors and training providers.

4. **Make Design Decisions**
   - Decide on strategies for training, workforce, and project development.

5. **Develop Implementation Plans**
   - Develop workforce development, contractor engagement, and implementation strategies.

6. **Develop Evaluation Plans**
   - Develop a parallel workforce quality assurance and accountability plan.

7. **Develop Resources**
   - Develop workforce and contractor engagement policies and procedures.

8. **Deliver Program**
   - Implement contractor coordination and workforce development plans.

9. **Assess & Improve Processes**
   - Monitor the effectiveness of workforce efforts, motivate continuous improvement, address low performers, and adapt as needed.

10. **Communicate Impacts**
    - Communicate program results to workforce stakeholders and contractor partners.

Contractor Engagement & Workforce Development – Identify Partners

Description

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

Your partners will include:

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

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

This handbook provides information and tools to help you:

- Assess potential contractor partners
- Develop strategies for contractor recruitment
- Establish ongoing relationships with contractors
Contractor Engagement & Workforce Development – Identify Partners

Step-By-Step

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

- Assess potential contractor participation
- Develop strategies for contractor recruitment
- Establish ongoing relationships
- Engage and recruit workforce
- Evaluate potential workforce
- Establish partnership agreements
- Develop strategies for contractor recruitment

Develop strategies for contractor recruitment

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

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

Your recruitment strategy should include identifying contractors, enticing them to participate, and continually supporting their participation in your program. As discussed when you learned about contractors in your market, canvas existing energy programs as well as local home performance contractors, HVAC contractors, and trade associations to identify contractors you might encourage to participate in your program. Consult online directories to find certified home performance professionals in your community. For guidance and resources on reaching out to contractors, including online contractor directories, see the market assessment handbook.
Help contractors enter the home performance market by lowering barriers to entry and providing training, networking, and mentoring opportunities.

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

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

- **Fayette County, Pennsylvania** helped contractors enter the market by providing grants and financing to minimize startup costs, and by giving contractors the opportunity to provide Building Performance Institute (BPI) certification to their technicians. The program partnered with a local private industry council to train technicians to become BPI certified at no cost to students. The partnership program helped new home performance professionals start new businesses, for example, by providing grants and low-interest loans to purchase computer software and professional equipment. Training and certification in the home performance industry provides Fayette County residents with an opportunity for stable and well-paying careers.

- New Hampshire’s **Beacon Communities Project** sought to revitalize the local economy of Berlin, New Hampshire, following the 2005 closure of a pulp mill. The program began working with local community colleges to provide BPI-certified training to develop more qualified home performance professionals. The program supplemented the training with mentoring opportunities for students who completed classroom trainings but needed more experience in the field before being hired by a contractor or starting their own company. In the nearly three years since the program’s launch in September 2013, 42 students had been trained through these classes and mentorships. These trained students helped the program offer quality home performance upgrades to homeowners, and the mentorship is helping students become qualified home performance professionals.
Example #1: Toolbox (5 of 5)

Contractor Engagement & Workforce Development – Identify Partners

Toolbox

The following resources are available to help design, implement, and maintain energy efficiency programs. These resources include templates and forms, as well as tools and calculators that contractors can use to verify whether they meet basic program requirements. To be listed as a Registered Vendor on the Efficiency Maine website, please complete this form, sign it, and submit it with the appropriate documentation.

Templates & Forms

- Efficiency Maine Residential Registered Vendor Agreement Form
  - Author: Efficiency Maine
  - Publication Date: 2014
  - A short, checklist-style form that contractors complete to verify whether they meet basic program requirements, and describe other information about their business.

Tools & Calculators

- Green for All Energy Efficiency Toolkit
  - Author: Green For All
  - Publication Date: 2012
  - This practitioner-focused Toolkit for residential energy efficiency programs assists new, established, and future energy efficiency partners in the proliferation of the green economy. It is intended as a practical guide to the resources and assistance a program manager can deploy to implement a variety of energy efficiency programs. A summary of the tools and resources is provided to help program managers identify what their programs nationwide have used to create their own efficiency programs.
Example #2 (1 of 4)

Our program is starting soon, and we need to research what the market for energy efficiency looks like in our community. What should I do to understand the market?
Example #2: Program Design Phase (2 of 4)

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

- **Planning**
  - Develop Implementation Plans
  - Develop Evaluation Plans

- **Implementation**
  - Develop Resources
  - Deliver Program

- **Evaluation**
  - Assess & Improve Processes
  - Communicate Impacts
Market Position & Business Model – Assess the Market
Survey existing and potential demand for energy efficiency products and services based on an understanding of policies, housing and energy characteristics, demographics, related initiatives and other market actors.
Example #2: Handbooks (4 of 4)

Market Position & Business Model – Assess the Market

Description

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

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

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

Find related information across other program components:

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

- Marketing & Outreach – Assess the Market
  Identify and prioritize potential target audiences based on their receptivity to energy efficiency services.

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

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

Access Step-by-Step, Tips, and resources

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

Access related information across all program components
Example #4 (1 of 4)

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

Use filters to further refine results
Example #4: Filter for Handbooks (2 of 4)

BBNP Search

Enter your keywords

quality assurance

Search

Search results

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

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

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

Program Design & Customer Experience — Identify Partners
Establish relationships with organizations that can help deliver your program by enhancing your knowledge, resources, capabilities and access to customers and contractors.
Example #4: Filter for Webcasts (3 of 4)

BBNP Search

Enter your keywords
quality assurance

Search

Search results

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

DOE Technical Assistance Program

Quality Assurance for Residential Retrofit Programs
October 26, 2010

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

U.S. Department of Energy
Energy Efficiency & Renewable Energy
Enter your keywords

Search results

**Quality Assurance and Enduring High Quality Work**
Author: Home Performance with Energy Star
Publication Date: 2011
Overview of quality assurance guidelines for Home Performance with ENERGY STAR.

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

**Quality Assurance Best Practices: Home Energy Performance with ENERGY STAR Programs**
Author: U.S. Department of Energy
Publication Date: 2011
This publication lists quality assurance best practices on how to create a quality assurance plan and the components that these plans should include.

Quality Assurance Best Practices: Home Performance with ENERGY STAR Programs

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

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

- **Contractor company and staff qualification requirements**, intended to ensure that qualified building scientists are assessing the home and are capable of protecting the brand promise of ENERGY STAR. These capabilities include:
  - Contractor staff understand how to represent the program and their participation in it.
  - Contractor staff understand the energy efficiency strategies applicable for residential retrofits.
  - Contractor staff can protect the health and safety of occupants when installing energy efficiency measures.
  - Contractor companies have proper licenses, insurance, etc.
  - Contractor companies sign participation agreements that outline proper conduct and program requirements.

- **Reporting process** that requires participating contractors to report jobs that are promoted to homeowners and performed under the HPWES logo:
  - Some – but not all – programs want to pre-approve jobs prior to commencement. However, this pre-approval tends to slow down jobs and can potentially reduce the audit-to-retrofit conversion rate.
  - Compliance with program requirements and industry standards (see below).

- **Job report review process** that ensures program compliance and provides for follow-up with the contractor when necessary:
  - Reporting of jobs (aka “file checks”) serve multiple purposes:
    - Rebate processing (i.e., eligibility of installed measures)
    - Sufficient data to have some reasonable assurance that measures will save energy
    - Confirmation that health & safety measures were being followed:
      - Combustion safety – draft test, Combustion Appliance Zone (CAZ) tests
      - Ventilation – ASHRAE compliance
      - Lead safe practices
      - Other (mold, asbestos, etc.,)
    - Data that can be used to inform an on-site QA visit
    - Opportunity to mentor contractors

1 Better Buildings
2 U.S. Department of Energy
Peer reviewers will comment on technical validity, market relevance, and framing

Beta User access:
- [https://bbnp.pnnl.gov/](https://bbnp.pnnl.gov/)
- Username: betauser
- Password: bbrpsc

Create a user account to customize experience

Get involved!
- Log in now to become a beta user or email: [BBRPSolutionCenter@erg.com](mailto:BBRPSolutionCenter@erg.com)
- Full public launch in October/November
Better Buildings Residential Network
Commitment: Provide DOE with annual number of residential upgrades and information about their benefits.

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

- Austin Energy
- Boulder County
- Mountain Association for Community Economic Development (MACED)
- New York State Energy Research & Development Authority
- Metropolitan Washington Council of Governments
- Local Energy Alliance Program
- Community Focused Innovation
- gtech
- leap
- Denver Energy Challenge
- Michigan Saves
- U.S. Department of Energy
### Programming:
Upcoming Peer Exchange Calls

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<tr>
<th>Date/Time</th>
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<td>June 26, 3:00-4:30 ET</td>
<td>Program Sustainability</td>
<td>Stakeholder Mapping: How to Identify Leaders, Target Audiences, and Gaps in Outreach</td>
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<tr>
<td>July 10, 3:00-4:30 ET</td>
<td>Marketing &amp; Outreach</td>
<td>Incorporating Behavior Change Efforts into Energy Efficiency Programs</td>
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<td>Financing &amp; Revenue</td>
<td>Effective Loan Program Design and Integration with Contractors</td>
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Learn More & Join: [www.betterbuildings.energy.gov/bbrn](http://www.betterbuildings.energy.gov/bbrn)
More Information

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

Danielle Sass Byrnett
Better Buildings Residential
danielle.byrnett@ee.doe.gov

Jonathan Cohen
Better Buildings Residential Network
jonathan.cohen@ee.doe.gov

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