

Quarterly Progress Report

Project Title: Town of University Park STEP-UP
Covering Period: 4/1/2011 through 9/30/2011
Date of Report: 9/30/2011
Recipient: Town of University Park, Maryland
Award Number: DE-EE0003809/000
Working Partners: Alliance to Save Energy, Pepco, Sun Trust, Maryland Energy Administration, UP Community Solar LLC
Cost-Sharing Partners: PEPCO, Maryland Energy Administration, UP Residents
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Project Objective: The Town of University Park, MD (UP) is implementing the *Small Town Energy Program for University Park (STEP-UP!)*, a \$1,425,000 effort designed to achieve energy efficiency market transformation within University Park and to serve as a roadmap for small towns across the U.S. - a sector largely neglected, to date, in federal and state energy efficiency programs. STEP-UP includes a full suite of model activities for replication including: energy audits and retrofits for residential, institutional and public sector buildings, financial incentives, local community delivery partners, and leading edge, but low-cost, social media techniques. STEP-UP also includes integrated solar and voluntary carbon market applications.

Background: The Town of University Park, MD employed the following approaches in the development of the STEP-UP program:

- Use of a robust logic model resulting in a program specifically designed for small towns;
- A sequential approach to community energy transformation, with each stage crafted around financial, transactional and informational barriers to energy efficiency;
- Extensive use of door-to-door outreach, “neighbor as program ambassador”, and other low-cost social media approaches;
- A key success factor of STEP-UP is the role of the expert Energy Coach who will facilitate efficiency transactions *at an individual household level*. This individual support – impossible in a larger efficiency program – is a centerpiece of the STEP-UP project;
- Extensive leveraging of community resources, partner programs and financial incentives;
- Integration of rooftop solar;
- A commitment to robust measurement and verification of all program activities;
- A mechanism to capture lessons learned in the delivery of STEP-UP! to create a road map for program replication in other small towns.

Work Planned for this Quarter: The major objectives for Q3, 2011 were as follows:

- Continue to drive the uptake of Home Performance with ENERGY STAR audits;
- Drive the uptake, through “Energy Coach” counseling sessions and aggressive social marketing / outreach, of energy efficiency retrofits;
- Resolve the outstanding contract negotiations with the financing and compost partners; re-commence contract negotiations with the school board on the solar project. Begin preparations for the street lighting element of the project;
- More management capacity will commence on the project;
- Deploy the public web site, EM&V questionnaire and yard signs;
- Have summer students deploy a house-to-house social marketing blitz;
- Deliver one new community Energy Workshop;
- Continue negotiations with Pepco and MEA related to market transformation opportunities;
- Deliver more public presentations regarding STEP-UP;
- Begin reaching out to other communities about STEP-UP, and drafting the outline of the STEP-UP tool kit for other small communities.

Significant Accomplishments This Period: Most significantly, Q2 2011 saw the continued uptake of the STEP-UP program by University Park residents. By the end of the quarter, fully 19% of the town had signed up to participate in the program; 12% of

the town had completed a Home Performance with Energy Star audit, and 7% of the town's households had completed a full home retrofit.

In addition: two community energy events were held with combined attendance of over 75 people; two public presentations about STEP-UP were delivered to combined audiences of over 100 people; three summer students continued working on the project; market transformation and contractor quality meetings were held with Pepco and Maryland Energy Administration; and more management capacity for the project came on at the end of Q3, 2011.

Status: This section tracks progress to date during the reporting period against the documented Statement of Objectives (SOPO) for the STEP-UP Program:

Establish Benchmarks:

- The EM&V questionnaire was delivered to all STEP-UP participants and responses are being collated. An RFP to secure the services of an EM&V specialist is under development.

Outreach and Community Based Social Marketing:

- Documents, minutes and agendas continue to be posted to the new STEP-UP web site, linked to the Town web site.
- Newsletter inserts continue to be circulated in the University Park Newsletter each month.
- The project web site (www.mystep-up.org) has been launched;
- Public yard signs were distributed and were extremely well received by town residents.
- Regular e-mail blasts continue to go out on the town List Serve.
- STEP-UP delivered two "STEPping UP" House Parties, in which neighbors invited their neighbors to enroll in the STEP-UP program.

Leverage Partnerships and Incentives:

- The partnership with Pepco Home Performance with ENERGY STAR has continued to work well, as Pepco-approved contractors conduct audits in University Park and the program makes use of the utility audit and retrofit incentive.
- The partnership with the Maryland Energy Administration likewise continues to work well, particularly in the program's leverage of the MEA's retrofit rebate.
- The financial partnership Sun Trust was finally concluded, without use of the loan loss reserve funds. However, Sun Trust nonetheless offered an extremely competitive loan product to STEP-UP participants, even without the LLR.
- Negotiations are back on with Prince George's County School Board regarding the solar project for UP Elementary School.

Facilitate Implementation:

- Suzanne Parmet, the Energy Coach / Project Manager, continues to work $\frac{3}{4}$ time on the project.
- Chuck Wilson came on late in Q3 as the Program Director. Chuck is working $\frac{3}{4}$ time through a sub-contract between UP and the Alliance to Save Energy.
- Three paid summer interns worked on the project throughout Q3.
- UP Town Council continues to be briefed about, supportive, and engaged in the project on a monthly basis.
- The Advisory Committee and working groups continue to provide regular guidance and support for the project.
- We brought on two contractors to help with database maintenance as well as QA/QC.

Measure Impacts:

- The retrofit work is still in early stages, so data through which to measure impacts is just coming in. The Quarterly Programmatic spreadsheet contains the data collected to date.
- The STEP-UP database, through which we intend to analyze the data coming in, is currently under construction.

Market Transformation:

- There have been major efforts at improving contractor reporting quality for STEP-UP participants. The STEP-UP Energy Coach drafted a memo to all participating contractors noting the desired contents of their model reports. Most contractors responded favorably, and there was a noticeable improvement in reporting quality. In addition, STEP-UP personnel met with representative of Pepco and the Maryland Energy Administration to discuss contractor quality and their respective program QA/QC. Each of these program partners is taking steps in the coming quarters to improve contractor quality in their programs.

Sustainable Program:

- No reportable activities during this reporting period.

Plans for Next Quarter:

The major plans for Q3, 2011 will be as follows:

- Continue to drive the uptake of Home Performance with ENERGY STAR audits;
- Drive the conversion rate from audit to retrofit;
- Drive the uptake, through “Energy Coach” counseling sessions and aggressive social marketing / outreach, of energy efficiency retrofits;
- Implement the compost program, local school program (including solar portion) and street lighting study;
- Work with DOE to determine how / if to reach out to neighboring communities with STEP-UP, to test the small town model in at least 5 other places;
- Upgrade the project web site and database;
- Contract for a communications manager;
- Continue STEP-UP house parties;
- Continue negotiations with Pepco and MEA related to market transformation opportunities;
- Deliver more public presentations regarding STEP-UP;
- Begin drafting the outline of the STEP-UP tool kit for other small communities.

Patents: Not Applicable

Publications/Presentations/Travel: Not Applicable

Status Summary Tables:

Update the attached Excel spreadsheet “Qtrly Report Template_Part 2”. Note there are 3 tabs for all work through the reporting quarter.

Please note: The Excel file MUST be submitted in Excel and uploaded with the quarterly report. It may not be write-protected or converted to PDF.