

# Targeting Contractors That Target Moderate Income Homeowners

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[www.egia.org](http://www.egia.org)

# About EGIA



## Contractor Services

- \* Project Financing
- \* Rebate Aggregation
- \* Sales & Operational Training
- \* Discounted Business Services



## Manufacturers Distributors & Energy Partner Programs

- \* Project Financing
- \* Rebate Aggregation
- \* EGIA Leadership Academy
- \* Contest & Event Sponsorship



## Homeowner Services

- \* Home Makeover Contests
- \* Approved Contractor Referral Program
- \* Energy Store



## Utility & Government Program Administration

- \* Rebate & Financing Program Administration
- \* Home Makeover Contests
- \* Contractor Network Development
- \* EGIA Leadership Academy



# Practice Radical Inclusion

- Firms/programs that already prominent in marketplace
- Those who have demonstrated capability/capacity to deliver/scale
- BPI certified professionals and accredited organizations (and EGIA, NATE, LEED, etc.)
- Past contractor participants in utility/government initiatives
- Avoid tendency to start with just new market entrants
- Identify skill and competency gaps and need for training



# Stay in Touch with Email Updates

October 22, 2010

**GEO Smart**  
Brought to you by **EGIA**

## Smart Financing

**Seven home tax credits you don't want to miss out on**

Heating and cooling account for more than half the energy used in a typical home. If your client's heating or cooling unit is more than 10 years old, it may be a good for them to think about replacing it. Find out about the 7 Home Energy Credits that expire on December 31, 2010.

[What are the 7 credits?](#)

**EGIA LEADERSHIP ACADEMY**

EGIA MEMBERS HAVE FREE ACCESS TO BUSINESS DEVELOPMENT TRAINING PROVIDED BY EGIA'S LEADERSHIP ACADEMY

[SEE THE LEADERSHIP ACADEMY CALENDAR](#)

**Utility Contractor Loan Program Updates**



- Keep Up To Date With Industry News
- Training Opportunities

# Provide Business Development Webinars

- Topics to improve their business profitability
- Target owners AND key staff
- Record to view on-demand
- Offer Continuing Education Units



**energy upgrade™ CALIFORNIA**

Home Recordings Agenda Presenters Attend Partners

## California Contractors and Whole House Raters: Partnering for Success

*Originally Presented on*  
**Thursday, February 23, 1:30pm - 4:30pm - San Jose**  
**Friday, February 24, 1:30pm - 4:30pm - San Diego**

*This event qualified for up to 1.5 BPE, 3.5 InternACHI and 2.5 NARI CEUs.*

Learn how successful California building performance contractors and whole house raters identify and embrace free program tools and other resources to grow their businesses in the evolving home performance and energy retrofit markets.

The workshop goal is to help participating Energy Upgrade California contractors and whole house raters identify and embrace free program tools and other resources to grow their businesses in the evolving home performance and energy retrofit markets.

Interactive sessions will feature panel presentations with businesses that have successfully incorporated building performance into traditional contracting and rater business models as well as industry experts that are helping others grow as well. Contractors and whole house raters will learn business skills to help them develop, build, and grow their business, and exchange information and experiences.

[View recordings of these events](#)

### Special Offers for Energy Upgrade California Contractors and Whole House Raters!

**FREE** registration to the March 1st EGIA Leadership Academy Web Exchange:  
"Repositioning Your HVAC Business as a Whole House Specialist"

**FREE** recording of the February 16th EGIA Leadership Academy Web Exchange:  
"Exit Strategy & Succession Planning: Do You Plan to Work Forever?"

[Learn how to Access These Events](#)



## LEADERSHIP ACADEMY

Forge Your Company Brand  
Thursday, October 24, 2013 11:00am - 1:00pm Pacific (1:00pm Eastern)

Overview Presenters Registration Partners Credits About

### Develop a strategy that will strongly position your business in the marketplace.

How techniques and communication tools have transformed the way we do all business, from residential to heavy commercial, means that our helping, long-time contractors, and you will be able to show your customers to your future sales. Company names are no longer defined by what you do, but by who you are. They are being shared by other companies and our customers are seeing the why or what makes it so great about yours. The best companies have not only figured out how to manage their change, but have embraced it, reinventing their message and content for competing and winning.

During the Leadership Academy Fall Conference, you will gain these insights:

- How to determine your target personality, strengths, value, design elements, and target position.
- What factors are critical for positioning and strengthening your brand.
- Actions that create powerful brand connections with your best customers (it's building that's hard), being accurate, increasing customer referrals, and maximizing their bottom line.

### Who should attend?

This web-based seminar is designed to be attended by owners, senior management, sales and marketing staff, office managers, and other key personnel with a vested interest in residential or professional construction, contracting, installation, design, or remodeling.

### Who should attend?

Learn all you need to know in a conference with your EGIA Leadership Academy Fall Conference web-based seminar. You will learn how to use the power of social media to create a brand and grow the web presence for your business. You will learn how to use the power of social media to create a brand and grow the web presence for your business. You will learn how to use the power of social media to create a brand and grow the web presence for your business.

### Don't participate in this study, leave the problem, together any way, participate live with those from your organization who are interested in your business. You will learn how to use the power of social media to create a brand and grow the web presence for your business. Webinar available for up to 1.5 BPE Continuing Education Credits, a combination of residential education credits, and a 1.5 BPE CEU. If you have any registration questions contact: - EGIA Registration Team - (800) 507-4474, ext. 300 - [egia@egia.org](mailto:egia@egia.org) **Want more Leadership Academy?** [Accessing Web Exchanges](#) [View the Archive](#) **SPONSOR YOUR EVENT!** **REGISTER TODAY!** - View our 2013 schedule - Register for our 2014 schedule [Join our members page on the website](#) [For a Recording](#) [View Event Schedule Request Form](#) [For a Recording](#) Has a Leadership Academy Web Exchange to sponsored by: **WebTechTools** **EGIA** Leadership Academy is brought to you by EGIA. **Join our EGIA Member!** Join EGIA to get the most out of your Leadership Academy Fall Conference. You will receive the EGIA Leadership Academy Fall Conference agenda, a complimentary membership, and more. [Join our EGIA Member!](#) **Do You Qualify for Free or Reduced Rate Membership?** Many qualify. All you need to do is fill out the EGIA Membership Application Form. To see if you qualify, click on the "Do You Qualify for Free or Reduced Rate Membership?" link. [Join our EGIA Member!](#)



# Create Contractor Exchange

- One-Stop-Shop for all utility and government program updates
- Name badge ribbons for “HVAC, “Insulation, “BPI,” etc.
- Panels with:
  - Successful contractors
  - Utility/Government program managers
  - Manufacturer/Distributor reps.
- Target business owners



A screenshot of the New York Contractor Exchange website. The header features the title "New York Contractor Exchange" and navigation tabs for Home, Agenda, Sponsors, Attend, and Archive. The main content area includes a featured article titled "Growing Your Business in a Difficult Market" with a sub-headline "September 13 &amp; 14, 2011 Doubletree Hotel, Tarrytown, New York". Below the article is a video player showing a woman speaking. To the right, there is a sidebar with sections for "Roles &amp; Responsibilities", "myserda" logo, and "EGIA Building Performance Contractors Association" logo. At the bottom, there is a "Register Now For The Tarrytown Exchange" button and contact information for EGIA Registration Support.

# Provide Third-Party Endorsement

## Recommended Contractor Screening Criteria:

- Orientation on Your Program Messaging and Requirements
- Verification of Valid Contractor License
- Verification of BPI or other credentials
- Satisfactory Dun & Bradstreet Check
- Satisfactory Background/Credit Check
- Verification Of Solid Business Financials
- Trade Reference Check

Take advantage of our new loan program and  
**START SAVING**  
energy & money right now!

Same-as-cash financing • Zero interest • No payments for up to 12 months

Make your home more comfortable and reduce your energy costs this winter. The City of Palo Alto Utilities, has partnered with the Electric & Gas Industries Association (EGIA) to offer you a new way to make installing certain money-saving, energy-efficiency measures easy and affordable.

**Choose what works best for you**  
Qualifying residential customers can now get either a traditional rebate for qualifying energy efficiency improvements or choose instead to get an interest-free loan for up to twelve months for measures including insulation, furnaces, boilers or water heaters.

Know your work has been done by approved contractors. To qualify for these loans, your work must be completed using GEOSmart Financing Program authorized contractors. These contractors are leading companies in the home improvement industry and GEOSmart has verified their capabilities through a rigid screening process which includes:

- Verification of contractor license
- Trade reference check
- Verification of business financials
- Approved to offer utility-sponsored financing

Cold weather is upon us—so now's the perfect time to act. For more information on putting these loans to work for you, call (650) 329-2241 or look online at [www.egia.org/paloalto](http://www.egia.org/paloalto)



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**CITY OF PALO ALTO UTILITIES**  
Inspired by a brighter tomorrow

(650) 329-2241

# Provide Contractor Recognition

## Contractor Of The Quarter

ABC Contracting Firm



Dedicated to Quality Installation, Honest Business Practices, and Installing Energy Saving Measures

Recognizing Outstanding Installation Practices and Customer Service. The Greatest Volume of Energy Efficiency/Renewable Energy Products Installed with Outstanding Customer Service.

Thank You For Your Dedication to Making a Difference.

  
Bruce Matulich CEO / Executive Director, EGIA

Quarter / Year

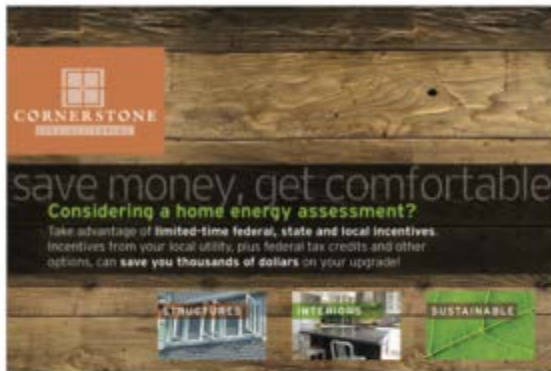
Geographic Area





# Offer Contractor Co-Branding

## 1. "Design your own"



front



back

## 2. Pre-designed Materials



Informational brochure, front

Informational brochure, back

# Leverage PowerSaver Initiative

**SunWest**  
Mortgage Company, Inc.  
Mortgage Bankers Since 1980

Questions? (866) 740-3677

[About Us](#) [FAQs](#) [Contact Us](#)

[PowerSaver Guidelines](#) | [Eligible Home Improvements](#) | [Rate Sheet](#) | [Payment Calculator](#)

**The PowerSaver Loan..**  
Backed by the FHA, the PowerSaver is the cost-effective way to help you finance energy-saving home improvements..

**GET A POWERSAVER RATE QUOTE TODAY!**

**The FHA PowerSaver**  
[PowerSaver Guidelines](#) | [Eligible Home Improvements](#) | [Get Rates](#) | [Calculate a Payment](#)

**Today's Rates** [View More Rates](#)

Term	Rate	APR*
15 year	5.625%	7.225%
20 year	5.875%	7.383%

**Assumptions:** Rates based on \$25,000 loan amount, LTV < 90%, no closing costs to borrower (closing costs paid via Sun West through federal grant), 7 day lock period, rates subject to change without notice.

**What is a PowerSaver Loan?**  
The PowerSaver loan is a program backed by the FHA to help homeowners make energy-efficient retrofits. PowerSaver loans offer the potential to lower your energy bills, reduce greenhouse gas emissions, increase the value of your home, and save money...all at the same time!

**With a PowerSaver loan you can:**

- Finance geothermal heat pumps, replacement doors, insulation, solar electric and solar thermal.

**Quick Rate Quote**  
Fill the below info to start the process

**Loan Amount:**

**Estimated Home Value:**

**Property State:**

**Property Zip Code:**

**First Name:**

**Last Name:**

**E-Mail Address:**

[Already Have A SunWest Loan?](#)  
[Click Here to Get Your Loan Status ONLINE!](#)

# Be A Finance Clearinghouse



# Conduct Home Energy Makeover Contest

- Innovative way to shine a light that mimics program
- Modeled after reality television shows
- Take B.S. approach to select home that **best demonstrates potential for energy savings**
- Products and services donated by *participating contractors*
- Media & VIPs invited to tour winning homes
- Winning home owners make compelling case to traditional/social media
- All about “losers” learning how to conduct their own energy makeover

Home | What's an Energy Makeover | Sponsors | Contact Us

**Xcel Energy**  
RESPONSIBLE BY NATURE™

**7th HOME ENERGY MAKEOVER**  
Comfort • Savings • Efficiency

What's an Energy Makeover?  
Our Sponsors  
Download the Contest Rules

**Two Xcel Energy Customers Will Win A Home Energy Makeover Worth Up To \$10,000!**

Xcel Energy is helping to educate its customers on how to make their homes more energy-efficient and comfortable with the **7th Xcel Energy Home Energy Makeover Contest**. Two homeowners will win a free home energy makeover, worth up to \$10,000, which will increase the overall comfort of their home and reduce their energy bills. To enter the contest, complete the entry form below.

**THE DEADLINE TO ENTER HAS PASSED. PLEASE CHECK BACK SOON FOR MORE INFORMATION ON THE WINNING HOMES.**

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**Goal: Engage Community To Demo Program Success**

# Showcase Their Customers

The screenshot displays the 'Los Angeles County' section of the Energy Upgrade California website. The page features a navigation menu with categories like 'My Action Plan', 'About the Program', and 'Local Info'. A 'family stories' section highlights 'The Kienzle Family, Whittier', featuring a photo of the family and a quote about their energy upgrade. A sidebar on the right, titled 'Their Savings by the Numbers', provides a detailed breakdown of costs and savings.

**energy upgrade CALIFORNIA**  
About Statewide Site Income Qualified Commercial Multifamily Log In or Register

## Los Angeles County

My Action Plan | About the Program | Contractors and Rates | Rebates and Incentives | Financing | Local Info

Overview | News | Events | Energy Champions | Family Stories | Neighborhood Program | Green Label | Multifamily

### homeenergy makeover family stories

SEE MORE FAMILIES  
select family [dropdown]  
Go

#### The Kienzle Family, Whittier

"Saving money is a top priority for almost every American family. But this makeover has done so much more. Our house had chilly drafts in the winter and sweltering heat in the summer. This will give my family a better quality of comfort and a more pleasing home environment. The better air quality will help my sons' asthma. And, we also have the satisfaction of reducing our carbon footprint."

[Read more details!](#)

#### The Kienzle's Upgrade

Stephen and Colleen Kienzle live in a 1956, one-story, ranch-style house with three sons, aged 12 to 17 years. Their sons have asthma, making indoor air quality a particular concern. They knew their utility bills were higher than their neighbors, but couldn't figure out why. Their home leaks about 50% of its heated and cooled air through unsealed and uninsulated openings. Key issues included older, single-pane windows, leak

#### Energy Saved

Cost-effective upgrades have achieved at least 25% energy savings.

Cost of Upgrade	\$6,380
Rebate	\$5,000
Total Cost	\$1,380

Additional upgrades have increased energy savings 40%.

Additional Investment	\$13,810
Additional Rebate	\$3,000
Total Cost	\$10,810

#### Monthly Savings on Utility Bills (vs. last year)

\$320

#### GreenPoint Rating

Calculation in progress!

#### Reduction in Green House Gases

Calculation in progress!

Available at [www.lacountymakeovercontest.org](http://www.lacountymakeovercontest.org)



# Produce Homeowner Workshops

- Offer insight on energy savings and other benefits
- Put together homeowners with contractors and get the heck outta the way
- Agenda sessions should feature winning homeowners with contractors who worked on their homes.
- Teach contractors how to sell and homeowners how to buy

**HOME ENERGY makeover**  
Education • Savings • Efficiency

WWW.HOMEENERGYMAKEOVER.ORG

WORKSHOP | EXPO | SPONSORS | ATTEND | WHO WE ARE | CONTACT US

**Home Energy Makeover Workshop & Expo**  
**October 4, 2008**  
at Laramie County Community College, Cheyenne, Wyoming

Hosted by Wyoming Home Performance Alliance

**Home Energy Makeover Workshop & Expo** event goal is to provide education with a product exposition for consumers interested in energy efficiency and renewable energy. This event is expected to attract about 150 Cheyenne-Laramie area residents as well as trade allies who will display energy-related products/services.

Admission tickets may be purchased in advance for \$10 per person from select non-profit community groups or \$15 tickets at the door. The ticket price includes snacks and refreshments. Lunch will be available for purchase on site at LCCC cafeteria.

[Click here for printable flyer with agenda](#)

click on house to enlarge

Adjacent Event for Regional Utilities Program Staff and Stakeholders: Wyoming Utility Efficiency Exchange  
**October 2-3, 2008**  
at Laramie County Community College, Cheyenne, Wyoming (LCCC)

HOME | WORKSHOP | EXPO | SPONSORS | ATTEND | WHO WE ARE | CONTACT US

**Goal: Champion Early Adopter Contractors and Homeowners**

# Offer A Contractor Roadmap

## Months 1-3

**Step 1** – Identify prospective contractors/stakeholders to invite into your contractor network

**Step 2** – Deliver webinars on business development topics

**Step 3** – Produce Contractor Exchange workshop(s)

## Months 4-6

**Step 4** – Conduct Program Participation Webinars/Workshop(s)

**Step 5** – Enroll and Screen Interested Contractors for Program Participation

**Step 6** – Establish Contractor Web Portal

**Step 7** – Establish Homeowner Web Portal

**Step 8** – Administer Contractor and Homeowner Incentives

**Step 9** – Conduct Quality Assurance

## Months 7-9

**Step 10** – Conduct Home Energy Makeover Contest

**Step 11** – Produce Homeowner Workshops

**Step 12** – Conduct Community Energy Exchange

