



Better Buildings Residential Program Solution Center

Demonstration Webinar, Nov. 19, 2014

Today's Agenda

- Poll: What Do You Do?
- Components of an Effective Energy Efficiency Program
- Solution Center Structure
- Solution Center Content
- Poll: What Example Would You Like to See?
- Questions & Answers

Audiences: Programs & Partners

- 1⁰ Program Administrators and Implementers
 - utilities, state energy offices, municipal governments, NGOs
- 2⁰ Program and Service-Delivery Partners
 - contractors, financial institutions, marketing firms
- 3⁰ Program Evaluators



Purpose: No More Starting from Scratch



- Help residential energy efficiency programs minimize trial and error to achieve success.



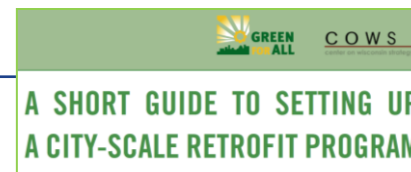
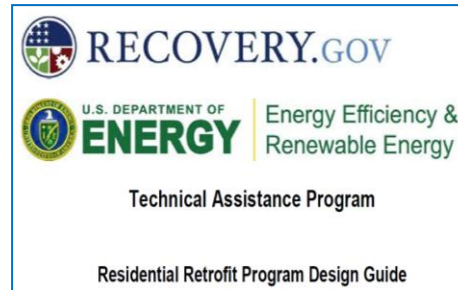
- Help programs and partners plan, operate, and evaluate their programs.



- Provide a living repository of examples, lessons, and resources.

Diverse Content Sources

- Content reflects the expertise and experience of:
 - Better Buildings Neighborhood Program grant recipients
 - Home Performance with ENERGY STAR Sponsors
 - EERE Technical Assistance Program
 - Guidance published by energy efficiency organizations about residential programming
 - *You! We invite submissions by users*



Components of an Effective Energy Efficiency Program

Six Components



Six Program Components



Who Are
You?

- **Market Position & Business Model:** Understand the market for energy efficiency products and services and your organization's role in it.



What Do
You Do?

- **Program Design & Customer Experience:** Create a customer-centric process that provides products and services that customers want.



How Well
Do You
Do It?

- **Evaluation & Data Collection:** Develop effective data collection and evaluation strategies in order to understand the effects of your program.

Program Components (cont.)



How to Find
Your
Customers?

- **Marketing & Outreach:** Spur demand for home energy upgrades and design offers to motivate customer action.



How Will
They Pay?

- **Financing:** Ensure that consumers have access to affordable financing that enable them to pay for energy upgrades.



Who Does
the Work?

- **Contractor Engagement & Workforce Development:** Design a program that provides value for contractors and support workforce training.

Solution Center Structure & Content

Solution Center Home Page

Better Buildings Residential Program Solution Center

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Solution Center Home

The Better Buildings Residential Program Solution Center is a repository of examples, lessons, and resources for residential energy efficiency programs. It is intended to help program administrators and their partners plan, operate, and evaluate their programs.

About

Handbook Index

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BROWSE BY:

Program Components

Program Design Phases

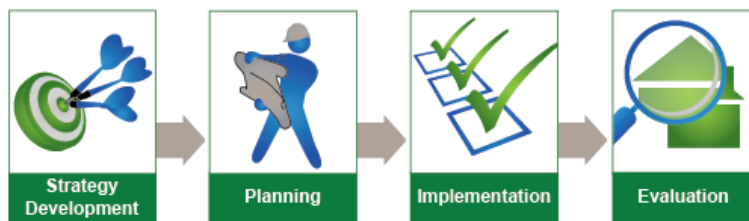
Content Types



Access Program Component Handbooks



Explore Program Design Phase Resources



RECENTLY UPDATED RESOURCES

- [My ENERGY STAR Tutorial](#)
- [Buildings Performance Database](#)
- [Standard Energy Efficiency Data \(SEED\) platform](#)
- [Home Performance Extensible Markup Language Schema \(HPXML\)](#)
- [Building Energy Data Exchange Specification \(BEDES\)](#)

MOST POPULAR HANDBOOKS

- [Market Position & Business Model – Overview](#)
- [Financing – Overview](#)
- [Marketing & Outreach – Overview](#)
- [Program Design & Customer Experience – Overview](#)
- [Contractor Engagement & Workforce Development – Overview](#)

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:

- Glenn Barnes, Environmental Finance Center at The University of North Carolina at Chapel Hill
- Jason Bogovich, SRA International, Inc.
- Lauren Boitel, EnergyFit Nevada
- Art Cappella, Fayette County, Pennsylvania
- Jack Clark, CCSE
- Julie de Seve, Conservation Services Group, Inc.
- Kyle Diesner, City of Portland Bureau of Planning and Sustainability

50+ Handbooks

- Explore by program component or program design phase
- Consistent structure

		Program Components					
							
		Market Position & Business Model	Program Design & Customer Experience	Evaluation & Data Collection	Marketing & Outreach	Financing	Contractor Engagement & Workforce Development
		<u>Overview</u>	<u>Overview</u>	<u>Overview</u>	<u>Overview</u>	<u>Overview</u>	<u>Overview</u>
Program Design Phases		<ol style="list-style-type: none"> <u>Assess the Market</u> <u>Set Goals & Objectives</u> <u>Identify Partners</u> <u>Make Design Decisions</u> 	<ol style="list-style-type: none"> <u>Assess the Market</u> <u>Set Goals & Objectives</u> <u>Identify Partners</u> <u>Make Design Decisions</u> 		<ol style="list-style-type: none"> <u>Assess the Market</u> <u>Set Goals & Objectives</u> <u>Identify Partners</u> <u>Make Design Decisions</u> 	<ol style="list-style-type: none"> <u>Assess the Market</u> <u>Set Goals & Objectives</u> <u>Identify Partners</u> <u>Make Design Decisions</u> 	<ol style="list-style-type: none"> <u>Assess the Market</u> <u>Set Goals & Objectives</u> <u>Identify Partners</u> <u>Make Design Decisions</u>
	Strategy Development						
		<ol style="list-style-type: none"> <u>Develop Implementation Plans</u> <u>Develop Evaluation Plans</u> 	<ol style="list-style-type: none"> <u>Develop Implementation Plans</u> <u>Develop Evaluation Plans</u> 	<ol style="list-style-type: none"> <u>Develop Evaluation Plans</u> 	<ol style="list-style-type: none"> <u>Develop Implementation Plans</u> <u>Develop Evaluation Plans</u> 	<ol style="list-style-type: none"> <u>Develop Implementation Plans</u> <u>Develop Evaluation Plans</u> 	<ol style="list-style-type: none"> <u>Develop Implementation Plans</u> <u>Develop Evaluation Plans</u>
	Planning						
	<ol style="list-style-type: none"> <u>Develop Resources</u> 	<ol style="list-style-type: none"> <u>Develop Resources</u> <u>Deliver Program</u> 	<ol style="list-style-type: none"> <u>Develop Resources</u> <u>Conduct Evaluation</u> 	<ol style="list-style-type: none"> <u>Develop Resources</u> <u>Deliver Program</u> 	<ol style="list-style-type: none"> <u>Develop Resources</u> <u>Deliver Program</u> 	<ol style="list-style-type: none"> <u>Develop Resources</u> <u>Deliver Program</u> 	
Implementation							
	<ol style="list-style-type: none"> <u>Assess & Improve Processes</u> <u>Communicate Impacts</u> 	<ol style="list-style-type: none"> <u>Assess & Improve Processes</u> <u>Communicate Impacts</u> 	<ol style="list-style-type: none"> <u>Communicate Impacts</u> 	<ol style="list-style-type: none"> <u>Assess & Improve Processes</u> <u>Communicate Impacts</u> 	<ol style="list-style-type: none"> <u>Assess & Improve Processes</u> <u>Communicate Impacts</u> 	<ol style="list-style-type: none"> <u>Assess & Improve Processes</u> <u>Communicate Impacts</u> 	
Evaluation							

Description: Why the stage is important and what user will learn

Contractor Engagement & Workforce Development – Overview

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Description

Stages

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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 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 they will see real energy savings and comfort improvements, 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.

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.

Step-by-Step: Detailed *what* and *how* information

Market Position & Business Model – Assess the Market

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Step-By-Step

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

[Expand All](#)

▶ 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

▼ Assess potential market demand for energy efficiency products and services

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 [DSIRE 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](#) describes 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.

Handbooks – Tips for Success (1 of 2)

Tips: Lessons based on documented experience from multiple programs

Program Design & Customer Experience – Overview

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Step-by-Step

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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 learned from these programs related to this handbook. This listing is not exhaustive.

▶ Keep the program simple for you

▶ Provide the customer with a simple

▶ Make upgrade options clear and

▶ Keep the program simple for you

▶ Emphasize the action you want

▶ Measure and evaluate performance

▼ 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.

Video Content (2 of 2)

Description Step-by-Step **Tips for Success** Examples Toolbox Topical Resources

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



Handbooks - Examples

Examples: Case studies, program presentations and reports, materials from energy efficiency programs

Financing – Communicate Impacts

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Description Step-by-Step Tips for Success **Examples** Toolbox Topics

Service Delivery

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 a record 564 homes in only six months--more than 10 times the utility's typical momentum for BetterBuildings-Austin Energy's Clean Energy Accelerator program. Austin Energy leveraged its existing Home Performance with ENERGY STAR infrastructure, experience, and contractor base but added a comprehensive rebate/financing offer for a finite launch period. Demand soared, and due to thoughtful planning, Austin Energy and its contractors were able to keep up with requests for energy evaluations, inspections, improvements, and loan origination, while learning valuable lessons along the way.

[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-rate energy improvements among households that are otherwise unlikely to participate due to high market rates.



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

Key Takeaways

- Use valuable, short-term promotion to jump-start program interest
- Build on existing energy efficiency efforts to launch quickly and learn for the next iteration
- Plan for contingencies and resolve your errors

"Getting on the landscape fast with some successes built positive momentum. There will be warts, so set reasonable expectations... but it is a great way to let people know you are on the scene."

—Karl Rábago, Vice President, Austin Energy

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

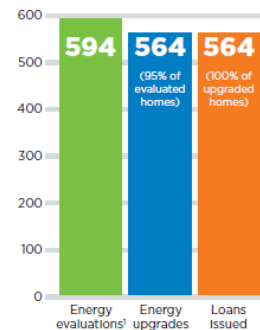
With its Best Offer Ever promotion, Austin Energy completed comprehensive energy upgrades in a record 564 homes in only six months—more than 10 times the utility's typical participation rate. To quickly develop momentum for Better Buildings-Austin Energy's Clean Energy Accelerator program with homeowners, Austin Energy leveraged its existing Home Performance with ENERGY STAR® infrastructure, experience, and contractor base but added a comprehensive rebate/financing offer for a finite launch period. Demand soared, and due to thoughtful planning, Austin Energy and its contractors were able to keep up with requests for energy evaluations, inspections, improvements, and loan origination, while learning valuable lessons along the way.

The Best Offer Ever

Austin Energy's high-value promotion—the Best Offer Ever—presented customers who signed up for an energy upgrade between October 1 and December 31, 2010, with a significant financial incentive, resulting in 564 Home Performance with ENERGY STAR upgrades in six months. In the past, participants in Austin Energy's Home Performance with ENERGY STAR program received a free energy evaluation¹ but had to choose between a rebate or low-interest rate financing through a local credit union to complete the recommended upgrades.² By signing up during the promotion, participants could receive both the rebate and financing, for a combined value of approximately \$2,300 per household. Even with the sizable incentive, Austin Energy leveraged \$4.39 million in loans using \$700,000 of its Better Buildings seed funding to pay for the incentives and marketing to launch the promotion.

Figure 1. Best Offer Ever Promotion Results




Data reflect energy upgrades completed between October 1, 2010, and March 31, 2011, under the Best Offer Ever. The Best Offer Ever was only available to homeowners who signed up between October 1 and December 31, 2010.



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

Toolbox: Templates, forms, tools, calculators

Evaluation & Data Collection – Conduct Evaluation






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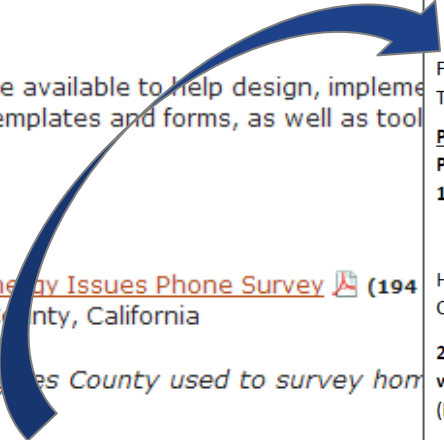
Description Step-by-Step Tips for Success Examples To

Toolbox


The following resources are available to help design, implement, and evaluate these resources. These resources include templates and forms, as well as tools to endorse these materials.

Templates & Forms

- [Los Angeles County Energy Issues Phone Survey](#)  (194 KB)
Author: Los Angeles County, California
Publication Date: 2011
Sample script Los Angeles County used to survey homeowners
- [Connecticut Workshop Survey](#)  (76 KB) 
Author: Connecticut Neighbor to Neighbor Energy Challenge
Publication Date: 2011
Short survey for Connecticut's Neighbor to Neighbor Energy Challenge that allowed the program to share its energy efficiency of
- [EnergySmart Residential Survey](#)  (81 KB) 
Author: Boulder County Energy Smart
Publication Date: 2013
Example survey about a homeowner's experience with
Boulder County, Colorado.



Thank you for filling out our survey! (Please write neatly. ☺)
Survey results will be kept confidential and help us better serve you.


Small Changes. BIG RESULTS.

First/ Last Name: _____
Town _____

Part 1:
Please check the responses below to sign up or learn more about the following:

	Sign Me Up	I'd like more Information	Already Done
1. Home Energy Solutions	_____	_____	_____
Clean Energy Options	_____	_____	_____

2. Are you affiliated with any community, municipal, business, non-profit, or other organizations which might be interested in supporting this initiative?
(If so, please list them here)

Part 2: Please check all answers that apply to you. If necessary, when indicated, please fill in your answer.

3. How did you hear about this workshop?

- ___ Newspaper: _____
- ___ Neighbor to Neighbor Email Newsletter
- ___ Facebook (what page?): _____
- ___ Neighbor to Neighbor Lighting! Visit
- ___ Website: _____
- ___ Referred by (individual): _____ (organization): _____
- ___ Other (please describe): _____

4) What are you most interested in learning more about?

- ___ Lighting
- ___ Efficient Appliances (please describe): _____
- ___ Heating, Ventilation, and Air Conditioning (please specify): _____
- ___ Clean energy (describe): _____
- ___ Other (please describe): _____
- ___ Insulation
- ___ Windows

Town, Date
Portland 3/12/11
Event Type
Workshop
Event ID:

Handbooks – Topical Resources

Topical Resources: Presentations, publications, webcasts

Contractor Engagement & Workforce Development – Deliver Program

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Description

Step-by-Step


Tips for Success

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Topical Resources

Topical Resources

The following resources provide additional topical information related to this handbook, which include presentations, publications, and webcasts. Visit [Examples](#)  for materials from [Examples](#) without individual programs.



Topical Presentations

[The Contractor-Participation-Inducing Home Performance](#)

Author: Mike Rogers; OmStout Consulting; LLC

Publication Date: 2012

Presentation summarizing the important elements needed for successful performance programs.

[Five Steps to a Profitable Contractor Base](#)  

Author: Courtney Moriarta; SRA International; Inc.; Emily 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 (administration, certification and credentialing, communication vs. trade), and training and sales support.

Five Steps to a Profitable Contractor Base

Session 2: Engaging Business Partners

Residential Energy Efficiency Solutions:
From Innovation to Market Transformation




Tuesday, July 10, 2012

Arlington, VA

Handbooks – Accessible Offline

Better Buildings Residential Program Solution Center

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Energy Data Facts





Glossary

BROWSE BY:



- Program Components
- Program Design Phases
- Content Types

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It is time to put all of your planning efforts to work by launching your program’s marketing and outreach activities. All of the essential elements of your program should be in place before you deliver it, including [marketing and outreach partners](#) , [staffing and workflow](#) , [marketing resources and outreach materials](#) , and [evaluation plans](#) .

You and your partners will want to be ready for sudden program interest that can be generated by new marketing efforts. This means coordinating with contractors, relevant program staff, and financial institutions to handle the influx of energy assessments, upgrade work, rebate requests, and loan applications.

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

Marketing & Outreach

Stages:

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

Handbooks – Where Am I?

Where Am I: How the handbook fits into the Solution Center

Program Design & Customer Experience – Make Design Decisions

Where Am I?

Description Step-by-Step Tips for Success Example

Description

Successful energy efficiency programs address the opportunities, and challenges of their local markets. Programs most likely to succeed aren't those that pick the most available options. Instead, you should develop a coordinated program with elements that are designed to overcome multiple market barriers. The greatest fit of your program to your local context is where your program is tailored to your specific market, your program is on:

- Your [market assessment](#) 📖, which identified needs in your market. Your program will be designed to seize the opportunities and overcome the barriers to adopting energy efficient technologies.
- Your [program goals and objectives](#) 📖, which define the program's purpose and seeks to achieve.
- Your [partners](#) 📖 who will help you deliver the program. This includes understanding of local contractors and their capacity, local utilities.

If your organization has a detailed [business plan](#) 📖

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:

Program Design & Customer Experience – Make Design Decisions

Overview

Strategy Development

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

Planning

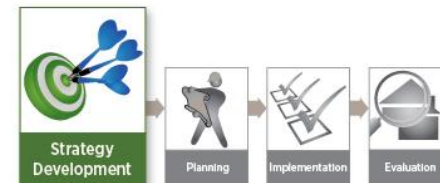
- Develop Implementation Plans
- Develop Evaluation Plans

Implementation

- Develop Resources
- Deliver Program

Evaluation

- Assess & Improve Processes
- Communicate Impacts



Handbooks – My Favorites

Better Buildings Residential Program Solution Center

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Description

It is time to put all of your planning efforts to work on your program's marketing and outreach activities. All of the following items should be in place before you deliver your program: [outreach partners](#), [staffing and workflow](#), [outreach materials](#), and [evaluation plans](#).

You and your partners will want to be ready for sudden program interest that can be generated by new marketing efforts. This means coordinating with contractors, relevant program staff, and financial institutions to handle the influx of energy assessments, upgrade work, rebate requests, and loan applications.

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

Marketing & Outreach

Stages:

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

My Favorites – Add Individual Resources

Description Step-by-Step Tips for Success **Examples** Toolbox Topical Resources



Examples

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

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Case Studies

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



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

This case study provides examples of lessons learned through the implementation and monitoring of Austin Energy's Best Offer Ever promotion. The promotional offer generated a record number of home upgrades in just six months. Due to thoughtful planning, Austin Energy and its contractors were able to keep up with this temporary surge in requests for energy evaluations, inspections, improvements, and loan origination, while learning valuable lessons along the way.

[Austin's Home Performance with ENERGY STAR Program: Making a Compelling Offer to a Financial Institution Partner](#)  (369 KB) 

Author: Lawrence Berkeley National Laboratory
Publication Date: 2011

This policy brief describes how Austin Energy's Home Performance with ENERGY STAR program worked with its lending partner, Velocity Credit, to originate almost 1,800 loans, totaling approximately \$12.5 million.

[Program Design Case Study: Boulder, Colorado](#)  (247 KB) 

Author: Home Performance Resource Center
Publication Date: 2010

This case study focuses on two components of the ClimateSmart initiative in Boulder, Colorado: the ClimateSmart Loan Program (CSLP) and the ClimateSmart Residential Energy Action Program (REAP). Includes best practices recommendations for the design and implementation of successful home energy upgrade programs, focusing on financing and incentives, marketing, workforce development, and business models.

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Finance Favorites

Handbooks

Financing

[Deliver Program](#) 04/04/2014
Launch your financing activities in coordination with other program components.

[Develop Implementation Plans](#) 04/04/2014
Develop a plan to implement your financing activities, with defined roles for financial institution partners, contractors, customers, and your program.

[Overview](#) 04/04/2014
Ensure that your program's customers will have access to affordable financing, so they can pay for the services you offer.

Resources

Webcast

Finance Planning 04/04/2014 [Presentation](#), [Media](#), [Transcript](#)
Author: U.S. Department of Energy
Publication Date: 2010
This webcast discussed the broad spectrum of needs financing mechanisms must address within integrated energy efficiency programs.

Case Studies

[Austin's Home Performance with ENERGY STAR Program: Making a Compelling Offer to a Financial Institution Partner](#) 04/04/2014
Author: Lawrence Berkeley National Laboratory
Publication Date: 2011
This policy brief describes how Austin Energy's Home Performance with ENERGY STAR program worked with its lending partner, Velocity Credit, to originate almost 1,800 loans, totaling approximately \$12.5 million.

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Better Buildings Residential Program Solution Center

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EERE » BTO » Better Buildings Neighborhood Program » Solution Center Home » Program Components » Marketing & Outreach

Solution Center Home **Marketing & Outreach – Deliver Program**



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Description Step-by-Step Tips for Success Examples Toolbox Topical Resources

Description












It is time to put all of your planning efforts to work by launching your program’s marketing and outreach activities. All of the essential elements of your program should be in place before you deliver it, including [marketing and outreach partners](#) , [staffing and workflow](#) , [marketing resources and outreach materials](#) , and [evaluation plans](#) .

You and your partners will want to be ready for sudden program interest that can be generated by new marketing efforts. This means coordinating with contractors, relevant program staff, and financial institutions to handle the influx of energy assessments, upgrade work, rebate requests, and loan applications.

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

Marketing & Outreach

Stages:

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

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The Better Buildings Residential Program Solution Center is regularly updated to include new content and resources based on user submissions and the expertise and experience of the Better Buildings Residential program staff and its partners. Select the boxes below based on program components, program design phases, individual handbooks, and content types to receive email updates of new information added to the Residential Program Solution Center. You will receive emails highlighting new resources and updates based on the frequency of notifications you select.

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Select Handbooks

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- Market Position & Business Model**
 - Overview
 - Assess the Market
 - Set Goals & Objectives
 - Identify Partners
 - Make Design Decisions
 - Develop Implementation Plans
 - Develop Evaluation Plans
 - Develop Resources
 - Assess & Improve Processes
 - Communicate Impacts
- Program Design & Customer Experience**
 - Overview
 - Assess the Market
 - Set Goals & Objectives
 - Identify Partners
 - Make Design Decisions
 - Develop Implementation Plans
 - Develop Evaluation Plans

Key Topics

Select Resources by Program Component

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

Select Resources by Program Design Phase

Subscribe to All

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- Planning**
- Implementation**
- Evaluation**

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Better Buildings Residential Program Solution Center

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Solution Center Home

The Better Buildings Residential Program Solution Center is a repository of examples, lessons, and resources for residential energy efficiency programs. It is intended to help program administrators and their partners plan, operate, and evaluate their programs.

About

Handbook Index

Energy Data Facts

Glossary

BROWSE BY:

Program Components

Program Design Phases

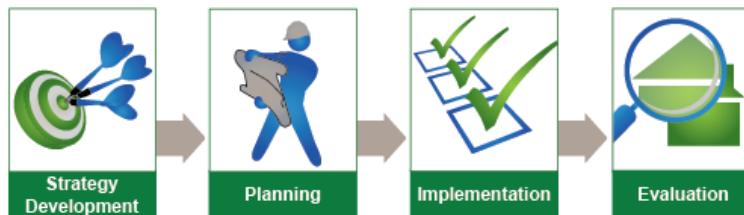
Content Types



Access Program Component Handbooks



Explore Program Design Phase Resources



RECENTLY UPDATED RESOURCES

- [My ENERGY STAR Tutorial](#)
- [Buildings Performance Database](#)
- [Standard Energy Efficiency Data \(SEED\) platform](#)
- [Home Performance Extensible Markup Language Schema \(HPXML\)](#)
- [Building Energy Data Exchange Specification \(BEDES\)](#)

MOST POPULAR HANDBOOKS

- [Market Position & Business Model – Overview](#)
- [Financing – Overview](#)
- [Marketing & Outreach – Overview](#)
- [Program Design & Customer Experience – Overview](#)
- [Contractor Engagement & Workforce Development – Overview](#)

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:

- Glenn Barnes, Environmental Finance Center at The University of North Carolina at Chapel Hill
- Jason Bogovich, SRA International, Inc.
- Lauren Boitel, EnergyFit Nevada
- Art Cappella, Fayette County, Pennsylvania
- Jack Clark, CCSE

Share your materials or comments!

The screenshot shows the website interface for the Better Buildings Residential Program Solution Center. At the top right, there are links for 'Login' and 'Register', and a search bar with the placeholder text 'Enter your keywords' and a 'SEARCH' button. The main header reads 'Better Buildings Residential Program Solution Center'. Below the header is a breadcrumb trail: 'EERE » BTO » Better Buildings Neighborhood Program » Solution Center Home » About'. The page title is 'How to Submit Content for the Better Buildings Residential Program Solution Center'. On the left side, there is a navigation menu with 'About' expanded to show 'How to Use This Tool', 'How to Submit Content' (which is highlighted), 'Handbook Index', 'Energy Data Facts', and 'Glossary'. Below the menu is a 'BROWSE BY:' section with links for 'Program Components' and 'Program Design Phases'. The main content area contains the text: 'If you have content that you think would be a helpful addition to the Better Buildings Residential Program Solution Center, we welcome your contributions. We are seeking:' followed by a bulleted list of content types: Case Studies, Program Materials, Program Presentations & Reports, Publications, Templates & Forms, and Tools & Calculators.

- Find submission guidelines
- Allow permission to feature your materials
- Email BBRPSolutionCenter@ee.doe.gov

Examples

Go to the Solution Center

<http://energy.gov/rpsc>

Example #1 (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?

Better Buildings Residential Program Solution Center

EERE » BTO » Better Buildings Neighborhood Program » Solution Center Home »

Solution Center Home The Better Buildings Residential Program Solution Center is a repository of examples, lessons, and resources for residential energy efficiency programs. It is intended to help program administrators and their partners plan, operate, and evaluate their programs.

Access Program Component Handbooks

Market Position & Business Model → Program Design & Customer Experience → Evaluation & Data Collection

Marketing & Outreach → Financing → Contractor Engagement & Workforce Development

Explore Program Design Phase Resources

Strategy Development → Planning → Implementation → Evaluation

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

RECENTLY 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
- EnergySmart Residential Survey (81 KB)
- RePower Bainbridge Upgrade Survey (333 KB)

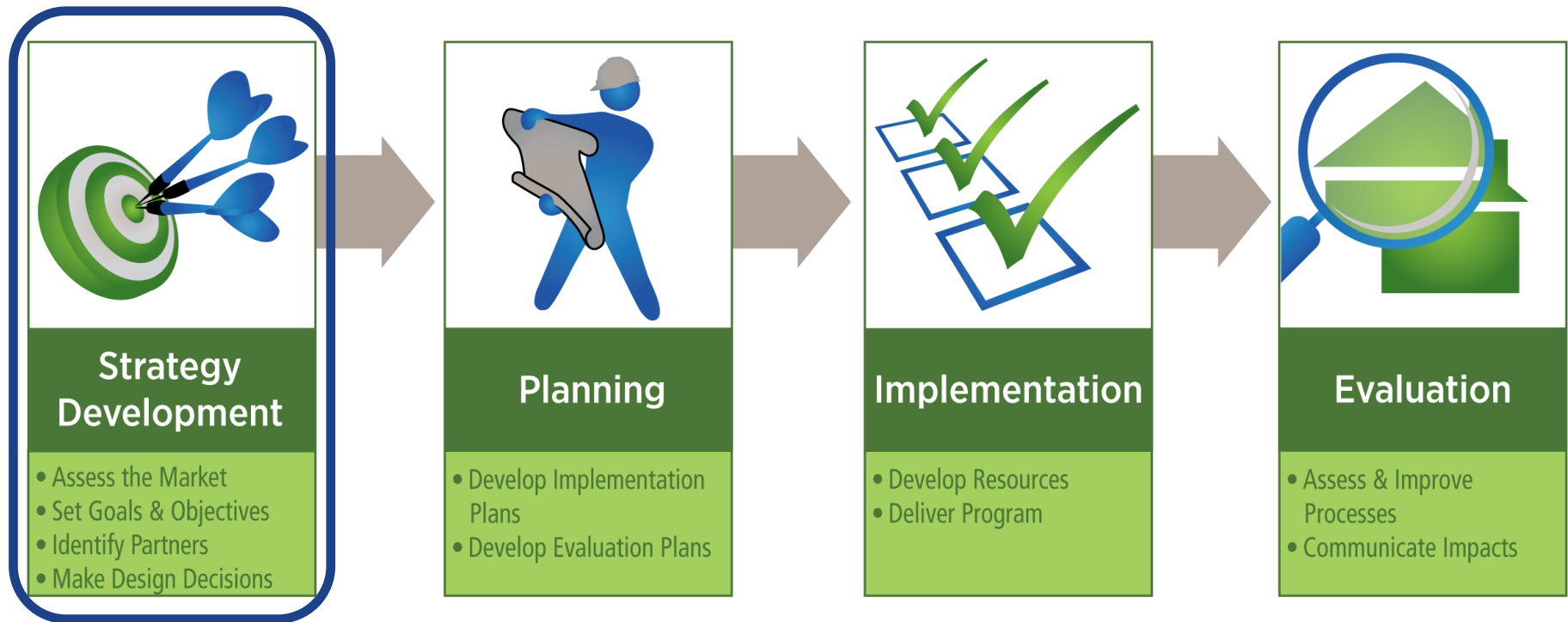
MOST POPULAR HANDBOOKS

- Market Position & Business Model – Overview
- Marketing & Outreach – 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:

Example #1: Program Design Phase (2 of 4)



Example #1: Strategy Development (3 of 4)

Better Buildings Residential Program Solution Center

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Solution Center Home **BBNP Search**


▶ About
▶ Handbook Index
▶ Energy Data Facts
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Enter your keywords


Search results


BROWSE BY:


▶ Program Components
▶ Program Design Phases
▶ Content Types

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.

Marketing & Outreach – Assess the Market 
Identify and prioritize potential target audiences based on their likely receptivity to your program's services.

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

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.

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.

CURRENT SEARCH

Search found 13 items
"assess the market"
[\(-\) Strategy Development](#)

[Clear All Filters](#)

FILTER BY CONTENT TYPE:
[Handbook \(13\)](#)

FILTER BY PROGRAM COMPONENT:
[Market Position & Business Model \(4\)](#)
[Program Design & Customer Experience \(2\)](#)
[Marketing & Outreach \(3\)](#)
[Financing \(2\)](#)
[Contractor Engagement & Workforce Development \(2\)](#)

FILTER BY PROGRAM DESIGN PHASE:
[\(-\) Strategy Development](#)

Example #1: Handbooks (4 of 4)

Market Position & Business Model – Assess the Market

Where Am I?



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Description Step-by-Step Tips for Success Examples Toolbox Topical Resources

Description

This handbook will help you assess what kind of energy efficiency activities and actors (e.g., home performance contractors, HVAC contractors, remodelers, retailers, utilities, 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.*

Market Position & Business Model

Stages:

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

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 #2: Homepage (1 of 3)

How do I develop an RFP to procure the financing services that my customers need?

Better Buildings Residential Program Solution Center

EERE » BTO » Better Buildings Neighborhood Program » Solution Center Home »

Solution Center Home

The Better Buildings Residential Program Solution Center resources, and knowledge for residential energy efficiency program administrators and their partners plan, implement programs.

Explore Program Components

Information in the Residential Program Solution Center is functions typically overseen by a residential energy efficiency termed "program components" throughout this tool. Selected

About

Handbook Index

Energy Data Facts

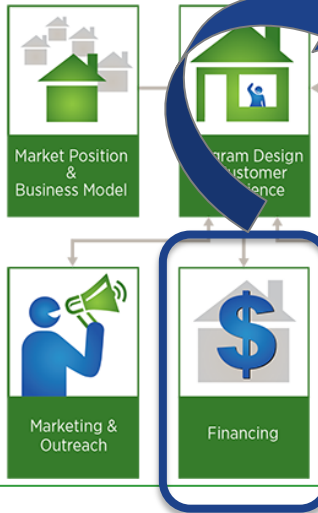
Glossary

BROWSE BY:

Program Components

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Content Types



Financing – Overview

Where Am I?



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Description

Stages

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Topical Resources

Quick Links

Stages

The following are important stages for successful program administrators to follow when implementing Financing activities; however, no two programs are the same, and program administrators need to take into account the unique aspects of their market to create the most effective approach possible. Select each stage to access its handbook.

- 1. 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.
- 2. Set Goals & Objectives**
Establish goals, objectives, and timeframes for your financing activities.
- 3. Identify Partners**
Identify and partner with financial institutions that can provide capital, underwriting, and other functions to enable your customers to access financing.
- 4. Make Design Selections**
Determine if enhancements to existing financing products or the development of new products are necessary to allow you to achieve your goals and objectives.
- 5. Develop Implementation Plans**
Develop a plan to implement your financing activities, with defined roles for financial institution partners, contractors, customers, and your program.
- 6. Develop Evaluation Plans**
Establish an evaluation plan that will allow you to determine how your financing activities are impacting the market.
- 7. Develop Resources**
Develop the procurement, outreach, and loan support resources required to perform your financing activities.
- 8. Deliver Program**
Launch your financing activities in coordination with other program components.
- 9. Assess & Improve Processes**
Focus on the continuous improvement of your financing activities by tracking and evaluating data, responding to feedback, and modifying strategies when needed.
- 10. Communicate Impacts**
Communicate the results of your financing activities to internal and external partners.

Example #2: Handbook (2 of 3)

Financing – Identify Partners

[Where Am I?](#)

Description

Step-by-Step

Tips for Success

Examples

Toolbox

Step-By-Step

Developing strong working relationships with your lending partners is key to accessing loans for their home energy upgrades. Best practice is to involve prospective or formal financial partners in the design process. More lenders can occur in parallel with [making financing design](#).

To establish relationships with lenders that will offer consumer friendly financing options, consider the following steps:

▶ Identify lenders

▶ Engage lenders

▶ Determine the process for soliciting proposals

▶ Evaluate proposals

▶ Negotiate and execute the lending agreement

Key Items to Include in Solicitations for Lending Partners

Key items to consider including in solicitations for lending partners are listed below. Do not develop the items for your solicitation in a vacuum; consultations with at least a few potential lenders will help you develop a solicitation that meets your program's needs and one that lenders understand and can respond to quickly with a proposal.

You will want to include background information about your program as well as requests for specific information from the lender. Make sure to define the prescribed format and content for proposals in response to the solicitation, and the rules, processes, and schedule that will lead to the selection of lenders.

Program background for you to include:

- Program summary and goals
- Existing program partners and their roles over the full program development and implementation period, as well as the roles you anticipate for the lending partner
- Available government funding and guidelines (if applicable)
- The target borrower market, the types of energy efficiency projects to be financed, and the economics of the projects
- Clean energy investment and lending volume targets

Items to ask lenders to respond to:

- Proposed structure and terms of the energy efficiency loans, including eligible borrowers, eligible projects, expected loan tenors, underwriting guidelines, and proposed loan terms
- Proposed structure of credit enhancements or revolving loan funds, including a risk-sharing formula
- Sources of capital and ability to attract additional sources of funds
- Financial stability of proposed lender and experience with residential energy efficiency loans
- Qualifications of the proposed lender's program manager, personnel, and support staff

Evaluate proposals

After you issue a solicitation for a lending partner, the next task is to evaluate the proposals and select a lender. Best practice for evaluation of proposals is to develop a scoring sheet that provides members of the evaluation team with a method to rank the qualifications of bidders objectively.

In addition to your organization's standard qualification criteria, you should carefully evaluate the proposal for:

- Financial stability and experience of the responding lender
- Qualifications and adequacy of the proposed program manager and staff
- A detailed description of the functions that will be performed by the lender
- A detailed description of the process and why the process will be acceptable to contractors
- A detailed description of the IT and other systems that will support the process
- A description of the method of compensation
- Reporting capabilities
- Quality control and quality assurance related to loan administration.

Example #2: Resources (3 of 3)

Description Step-by-Step Tips for Success Examples

Program Materials

[Sample RFP: City of Independence, Missouri](#) (217 KB)
Author: City of Independence, Missouri
Publication Date: 2010
A sample competitive procurement procedure to award lo

[Sample RFP: Greensboro Energy Efficiency Loan Produ](#)
Author: Better Buildings of Greensboro, North Carolina
Publication Date: 2011
A sample RFP from Greensboro, North Carolina, for energ

Description Step-by-Step Tips for Success Examples

Templates & Forms

[Financing Program Goals and Design Template Present](#)
Author: U.S. Department of Energy
Publication Date: 2011
Template for program administrators to fill out to help det

[DOE Template Financial Institution RFP](#) (659 KB)
Author: U.S. Department of Energy
Publication Date: 2010
A template competitive procurement procedure to award l

[INSERT GRANTEE LOGO]

[NOTE: Numbers and any fictional names are used for illustrative purposes]

**REQUEST for PROPOSALS (RFP)
for Residential Energy Efficiency Loan Facilities:
_____ City**

Proposal Due Date: September X, 2010 at XX:00 a.m.

Send Proposals to: City of []
Office of Sustainability
789 Main St
[City], [State] 19890

If you have questions about this RFP, please contact:

**Lead Contact for RFP
Questions & Communications:** Cary S. Ford, Projects Manager
800-123-4567, CFord@City.gov

1. Request for Proposals (“RFP”)

Based on a grant from the [] State Energy Fund (“SEF”), the City of [] (the “City”) is seeking a financial institution (FI) partner to participate in its city-wide energy efficiency initiative (“Program”). We are requesting proposals from FIs to provide the following services:

- assist in final structuring of the energy efficiency loan program, in collaboration with the City and its financial advisor, Energy Finance Corp. (“EFC”);
- originate and provide energy efficiency (“EE”) loans (“Loans”) to residential energy users (and, possibly in the future, small commercial and non-profit energy users);
- manage a loan loss reserve fund (“LRF”), or other credit enhancement mechanism (see Section 5), funding for which shall be provided by the City to enhance the credit structure of the Loan portfolio;
- provide related Loan administration services, e.g., billing and collections; and
- provide reports on the Loan portfolio and LRF.

Example #3 (1 of 7)

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

The screenshot displays the 'Better Buildings Residential Program Solution Center' website. The main content area is titled 'Contractor Engagement & Workforce Development – Overview'. A blue arrow points from the 'Contractor Engagement & Workforce Development' icon in a central diagram to the 'Description' section of the overview page. The diagram shows a flow from 'Market Position & Business Model' to 'Program Design & Customer Experience' to 'Evaluation & Data Collection', with 'Marketing & Outreach' and 'Financing' also feeding into the 'Contractor Engagement & Workforce Development' box. Below this is a 'Program Design Phase Resources' section with icons for Strategy Development, Planning, Implementation, and Evaluation. The 'Description' section on the right contains text about the importance of contractor relationships and a list of key resources.

Contractor Engagement & Workforce Development – Overview

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Description	Step-by-Step	Tips for Success	Examples	Toolbox	Topical Resources	Quick Links
-------------	--------------	------------------	----------	---------	-------------------	-------------

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 review of the Better Buildings Residential Program Solution Center handbooks:

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.

Example #3: Contractor Engagement Overview (2 of 7)

Contractor Engagement & Workforce Development – Overview

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Description Stages Tips for Success Examples Toolbox Topical Resources Quick Links

Stages

The following are important stages for successful program administrators to follow when implementing Contractor Engagement & Workforce Development activities; however, no two programs are the same, and program administrators need to take into account the unique aspects of their market to create the most effective approach possible. Select each stage to access its handbook.

- [1. Assess the Market](#) *Assess the quality and capacity of a*
- [2. Set Goals & Objectives](#) *Establish or refine specific workforce*
- [3. Identify Partners](#) *Establish relationships with contracto*
- [4. Make Design Decisions](#) *Decide on strategies for training, wor*
- [5. Develop Implementation Plans](#) *Develop workforce development, con*
- [6. Develop Evaluation Plans](#) *Develop a workforce quality assuranc*
- [7. Develop Resources](#) *Develop workforce and contractor en*
- [8. Deliver Program](#) *Implement contractor coordination an*
- [9. Assess & Improve Processes](#) *Monitor the effectiveness of workforc*
needed.
- [10. Communicate Impacts](#) *Communicate program results to wor*

Contractor Engagement & Workforce Development – Identify Partners

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Description Step-by-Step Tips for Success Examples Toolbox Topical Resources

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 recruit them
- 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

Stages:

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

Example #3: Step-by-Step (3 of 7)

Contractor Engagement & Workforce Development – Identify Partners

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Description Step-by-Step Tips for Success Examples Toolbox Topical Resources

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

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](#) .

Example #3: Tips for Success (4 of 7)

Contractor Engagement & Workforce Development – Identify Partners

[Where Am I?](#)



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Description

Step-by-Step

Tips for Success

Examples

Toolbox

Topical Resources

Tips for Success

In recent years, hundreds of communities across the country have joined the Better Buildings Neighborhood Program. The following tips present the top lessons learned.

▶ Design a program that provides training, networking, and mentoring opportunities

▶ Establish collaborative partnerships with local industry and community organizations

▶ Help contractors enter the home performance market by lowering barriers to entry and providing training, networking, and mentoring opportunities

▶ 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 reinvigorate the local economy of Berlin, New Hampshire, following the 2006 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 #3: Examples (5 of 7)

Contractor Engagement & Workforce Development – Identify Partners

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Examples

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

Case Studies

[A Business Case for Home Performance Contracting](#)  

Author: Pacific Northwest National Laboratory

Publication Date: 2012

This report contains information on the market for home performance contracting; the needs and costs of home performance contracting in the industry; home performance business approaches; and how to reach customers. It also contains detailed profiles of eight successful contractors.

[Home Performance with ENERGY STAR Contractor Stories](#) 

Author: U.S. Department of Energy

These case studies highlight examples of participating contractors using ENERGY STAR to help homeowners improve their homes' energy efficiency.

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

Author: U.S. Department of Energy

Publication Date: 2012

LaborWorks @ NeighborWorks is a nonprofit temporary labor pool (NWWVT) to assist professional contractors involved with the Home Energy Assistance Program (HEAT). In the first of this Focus Series, DOE interviews Melinda on why NeighborWorks set up the temporary labor pool, how it works, and what programs to consider.

U.S. DEPARTMENT OF
ENERGY

Energy Efficiency &
Renewable Energy

BUILDING TECHNOLOGIES PROGRAM



BUILDING AMERICA ENERGY RENOVATIONS

A Business Case for Home Performance Contracting

PREPARED BY

Pacific Northwest National Laboratory

October 2012

Example #3: Toolbox (6 of 7)

Contractor Engagement & Workforce Development – Identify Partners

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The following resources are available to help design, implement, and evaluate energy efficiency programs. These resources include templates and forms, as well as tools to endorse these materials.

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 qualifications, 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 helps new, established, and future energy efficiency program managers assist new, established, and future energy efficiency program managers. It is intended as a practical program manager can deploy to implement a variety of energy efficiency programs. The Toolkit includes summary documents, RFPs, contracts, and other program materials that nationwide have used to create their own efficiency programs.



Residential Registered Vendor Agreement Form

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.

Section 1: Registered Vendor Information. Please enter information you would like to appear on the website.

Business Name		Phone Number	
Street Address		Fax Number	
City, State, Zip		Business Email	
Contact Name		Website	

Section 2: Basic Requirements. Please include the following documentation when submitting agreement form.

<input checked="" type="checkbox"/>	Required Documentation
<input type="checkbox"/>	Code of Conduct: http://www.efficiencymaine.com/docs/EMCode-of-Conduct.pdf
<input type="checkbox"/>	General Commercial or Professional Liability Insurance (Minimum coverage: \$500,000)
<input type="checkbox"/>	Workers Compensation Insurance (Minimum coverage: \$500,000) <i>Please Note: A Sole Proprietor without employees is not required to have Workers Compensation coverage. Similarly, a Limited Liability Corporation without employees is not required to have Workers Compensation coverage for the owners. If your business is exempt from this requirement, please write "NA" in the checkbox to the left.</i>

Section 3: Service Offerings and Qualifications. To have the following services reflected on the [Efficiency Maine Locator](#), please check the rows that apply and **SUBMIT DOCUMENTATION OF APPLICABLE QUALIFICATION(S)**:

<input checked="" type="checkbox"/>	Service Offering	Qualification(s)*
<input type="checkbox"/>	Energy Advisor	Building Performance Institute (BPI) Building Analyst AND Maine Limited Energy Auditor Technician (LEAT) license
<input type="checkbox"/>	Air Sealing and Assessment	Building Performance Institute (BPI) Building Analyst AND Maine Limited Energy Auditor Technician (LEAT) license
<input type="checkbox"/>	Insulation	Insulation installation training
<input type="checkbox"/>	Heat Pumps	Environmental Protection Agency (EPA) Section 608 Refrigerant Handling Certification AND installation training within the last two years by a manufacturer of ENERGY STAR heat pumps
<input type="checkbox"/>	Gas	Maine Fuel Board License (Master or Journeyman, Propane and Natural Gas Technician)
<input type="checkbox"/>	Oil	Maine Fuel Board License (Master or Journeyman, Oil and Solid Fuel Technician)

Example #3: Topical Resources (7 of 7)

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Topical Resources

The following resources provide additional topical information related to this publications, and webcasts. Visit [Examples](#)  for materials from and about

Topical Presentations

[Contractor Outreach: Design & Implementation for Residential Retrofit Programs](#)

Author: Jared Asch; Efficiency First

Publication Date: 2011



This presentation describes strategies for outreach to energy contractors and incentives.

[The Contractor-Participation-Inducing Home Performance Programs](#)

Author: Mike Rogers; OmStout Consulting; LLC

Publication Date: 2012

Presentation summarizing the important elements needed to induce contractor participation in home performance programs.

[Five Steps to a Profitable Contractor Base](#)  

Author: Courtney Moriarta; SRA International; Inc.; Emily Levin; Vermont Building Performance Institute; Brad Geyer; Fayette County Better Building Department of Labor; Sam Flanery; Building Science Academy

Publication Date: 2012

Presentation on five steps to building a profitable contractor base. The steps include: business administration, certification and credentialing, communicating with contractors, contractor requirements (business vs. trade), and training and sales support.

Contractor Outreach

Design and Implementation of Residential Retrofit Programs



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▼ **About**

- How to Use This Tool
- How to Submit Content**
- Handbook Index
- Energy Data Facts
- Glossary

BROWSE BY:

- ▶ Program Components
- ▶ Program Design Phases

If you have content that you think would be a helpful addition to the Better Buildings Residential Program Solution Center, we welcome your contributions. We are seeking:

- [Case Studies](#) that describe a successful residential energy efficiency program(s) and a particular strategy undertaken
- [Program Materials](#) developed by residential energy efficiency programs to support program implementation (e.g., requests for proposals, process flowcharts, marketing plans, utility bill authorization forms, flyers).
- [Program Presentations & Reports](#) developed by residential energy efficiency programs that describe components of their programs and results of program evaluations.
- [Publications](#) such as reports, guidelines, and other materials about residential energy efficiency program strategy development, planning, implementation, and evaluation.
- [Templates & Forms](#) such as worksheets, surveys, and other materials that can be modified and used by residential energy efficiency programs.
- [Tools & Calculators](#) that can be used to help plan, operate, and evaluate programs.

- Find submission guidelines
- Grant permission to feature your materials
- Email: BBRPSolutionCenter@ee.doe.gov

Connect with Colleagues Around the Country

Join the Better Buildings Residential Network

Connects energy efficiency programs and partners to share best practices to increase the number of homes that are energy efficient.

Benefits:

- Peer Exchange Calls
 - Business Partners/Workforce
 - Marketing and Outreach
 - Evaluation & Data Collection
 - Financing/Revenue Streams
 - Moderate, Low-Income Markets
 - Multifamily Residential Market
 - Program Sustainability
- Tools, templates, & resources
- Recognition: media, materials
- Leadership initiatives
- Member requested initiatives
- Programming for new staff
- Newsletter updates on trends

www.betterbuildings.energy.gov/bbrn

Access the Solution Center: <http://energy.gov/rpsc>

The image shows a screenshot of the Better Buildings Residential Program Solution Center website. The website header includes the U.S. Department of Energy logo and the text "Energy Efficiency & Renewable Energy". The main heading is "Better Buildings Residential Program Solution Center". Below this, there is a navigation menu with options like "About", "Handbook Index", "Energy Data Facts", "Glossary", and "Program Components". The main content area features a "Access Program Component Handbooks" section with icons for "Market Position & Business Model", "Program Design & Customer Experience", "Evaluation & Data Collection", "Marketing & Outreach", "Financing", and "Contractor Engagement & Workforce Development". A "Explore Program Design Phase Resources" section is also visible. Overlaid on the right side of the screenshot is a four-step process flow diagram with icons and labels: "Strategy Development" (target icon), "Planning" (person with clipboard icon), "Implementation" (checkmarks on a document icon), and "Evaluation" (magnifying glass over a house icon).