Better Buildings Residential Program Solution Center

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Agenda

- Who's Here?
- Overview
- Tour of Solution Center
  - Content
  - Navigation & Functionality
  - Customize Your Experience
  - Choose Your Own Adventure (Examples)
- Next Steps
  - Peer Review
  - Become a Beta User!
  - Feedback on Future Enhancements

For Your Consideration…

- How would you use the tool?
- What do you find helpful about the tool?
- What do you find confusing about the navigation or other features?
- What types of content should we add?
- What additional features would you like to see?

Better Buildings Residential Program Solution Center

Overview

U.S. DEPARTMENT OF ENERGY

Purpose: No More Starting from Scratch

- Helps residential energy efficiency programs more quickly adopt innovations to minimize trial and error and achieve success.

- Helps programs and partners plan, implement, manage, and evaluate residential programs.

- Living repository for lessons, resources, and knowledge collected from program experience.

Audiences: Programs & Partners

- Intended audiences:
  - 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

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
  - *Future: submissions by users*

Better Buildings
NEIGHBORHOOD PROGRAM
U.S. DEPARTMENT OF ENERGY

RECOVERY.GOV
U.S. DEPARTMENT OF ENERGY | Energy Efficiency & Renewable Energy
Technical Assistance Program
Residential Retrofit Program Design Guide

Innovative Energy Efficiency Projects Implemented by Local Governments in the Southwest
SWEEP

Existing Homes Program Guide
June 2010
CEE
Consortium for Energy Efficiency

Driving Demand for Home Energy Improvements:
Motivating residential customers to invest in comprehensive upgrades that eliminate energy waste, avoid high bills, and spur the economy
September 2010
Environmental Energy Technologies Division

ACEEE
American Council for an Energy-Efficient Economy

HOME PERFORMANCE RESOURCE CENTER
BEST PRACTICES FOR ENERGY RETROFIT PROGRAM DESIGN

GREEN ALL
COWS
A SHORT GUIDE TO SETTING UP A CITY-SCALE RETROFIT PROGRAM

Home Performance with ENERGY STAR®
Sponsor Guide
HOME PERFORMANCE WITH ENERGY STAR

Structured Criteria for Including Guidance and Examples

Evidence Progression

New, relatively untested

Innovation

- *Other websites*

Anecdotal evidence

Promising Approach

- *Step-by-Step*

Qualitative data & multi-source anecdotal evidence

Lesson Learned

- *Tips for Success & Step-by-Step*

Mature, fully supported, multi-source quantitative evidence

Best Practice

- *Coming in 2015*

What You Are About to See

- **Version 1 (beta) release**
- Contains ~85% of expected content
- Includes ~90% of features & functionality
- Allows users to review content, test the tool, and provide comments
- We welcome your feedback – through this session or email: BBRPSolutionCenter@erg.com

Version 2 (full) release expected in Fall 2014

Better Buildings Residential Program Solution Center

Tour

U.S. DEPARTMENT OF ENERGY

Home Page

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Better Buildings Residential Program Solution Center

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BROWSE BY:

- Program Components
- Program Design Phases
- Content Types

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

Explore Program Components

Information in the Residential Program Solution Center is organized around the primary functions typically overseen by a residential energy efficiency program administrator, termed "program components" throughout this tool. Select a program component below.

Look Across Program Design Phases

If you are not interested in jumping into a specific program component, you can explore the same information by choosing one of the four major phases in a program's lifecycle. Each "design phase" includes handbooks from the six program components to help you and your partners strategize, plan, implement, and evaluate your program. Select a program design phase below.

MY FAVORITES

- Finance Favorites
  6 items
- Marketing & Outreach Materials
  4 items
- New Favorites Folder

RECENTLY UPDATED RESOURCES

- Contractor Engagement & Workforce Development – Set Goals & Objectives
- Better Buildings Program Element Flowcharts
- Options for Raising Capital (and Leveraging Public Funds) for Residential Energy Loan Programs
- Trusted Partners: Everyday Energy Efficiency Across the South
- State Fact Sheets on Household Energy Use

MOST POPULAR HANDBOOKS

- Marketing & Outreach – Overview
- Market Position & Business Model – Overview
- Financing – Overview
- Program Design & Customer Experience – Overview
- Financing – Set Goals & Objectives

Better Buildings U.S. DEPARTMENT OF ENERGY

Content: Six Program Components

Content: Four Program Design Phases

Access Handbooks by Program Component or Program Design Phase

Access handbooks through navigation bar or central graphics

Access Handbooks by Program Component

After selecting a Program Component, the user is taken to the Program Component's Overview handbook.

Market Position & Business Model – Overview

Where Am I? | Subscribe | PDF version | Print this page

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

Description

A vibrant residential energy efficiency market provides the benefits of reduced energy use, improved public health and safety, lower energy bills, job opportunities, and a better environment. The first step in entering this market is to define your organization's niche in the market for providing energy efficiency services, otherwise known as your market position. You can then use your established market position to create a viable business model, the overarching administrative and financial structure of the organization, before designing and implementing an energy efficiency program.

Key Resources

- Better Buildings Neighborhood Program Business Models Guide is a resource for those interested in entering, or expanding their services in, the residential energy efficiency market. The guide also aims to enhance understanding of critical market players as organizations identify partners for long-term growth.

To position yourself appropriately in the market you will need to understand the energy efficiency value chain and what it looks like in your market. A value chain highlights all key participants and how they interact to deliver value to customers. It includes the actors with whom you may cooperate or compete in the marketplace, the products and services these actors provide to customers, and the policies, incentives, and other factors that shape how actors operate in the market. An example of a national view of the residential energy efficiency value chain is described in Assess the Market and Section 1.3 of the Better Buildings Neighborhood Program Business Models Guide.

To understand your market's value chain and the potential for your position in it, you will need to assess the market to understand:

- Market demand for energy efficiency products and services
- How the market is already being served by other organizations and programs
- Existing gaps in the market that your organization might fill
- Your organization's strengths and capabilities to provide products and services in the market
- What public or private sector entities you want to partner with to complement your organization's capabilities.

7 Tabs in Every Handbook

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

Contractor Engagement & Workforce Development – Overview

Where Am I? Subscribe PDF version Print this page

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

Description

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

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

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

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

Key Resources

- DOE Guidelines for Home Energy Professionals include standard specifications for quality work, critical tasks and core competencies for effective training programs, and a framework for professional certifications. The website includes job task analyses that describe the tasks and skills needed for specific jobs, information about accredited training programs, downloadable training modules, and other resources.
- DOE Building America Solution Center provides home performance professionals with building science resources, integrated energy efficiency tools, case studies, and best practices designed to dramatically reduce energy use in new and existing homes. This website includes expert information on hundreds of high-performance design and construction topics, including air sealing and insulation, HVAC components, windows, indoor air quality, and more.

Handbooks – Step-by-Step (1 of 2)

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

Market Position & Business Model – Overview

Where Am I? Subscribe PDF version Print this page

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

Step-By-Step

The following steps list important activities for successful program administrators to take when implementing Market Position & Business Model 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 step to access the handbook.

- **Assess the Market**
  Assess current market offerings, new opportunities for energy efficiency services, and organizational role and capacity.
- **Set Goals & Objectives**
  Establish or update organizational mission, vision, and goals related to energy efficiency.
- **Identify Partners**
  Engage stakeholders in business model design and establish targets for strategic partnerships.
- **Make Design Decisions**
  Establish governance and decision processes; develop value proposition and business model for energy efficiency services.
- **Develop Implementation Plans**
  Develop or revise business, financial, and staffing plans.
- **Develop Evaluation Plans**
  Develop continuous improvement strategies and procedures.
- **Develop Resources**
  Develop management and operational systems.
- **Assess & Improve Processes**
  Examine procedures for operating the organization and refine as needed.
- **Communicate Impacts**
  Publicize benefits and lessons learned resulting from organizational operations.

Handbooks – Step-by-Step (2 of 2)

Market Position & Business Model – Assess the Market

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

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 to provide products and services in the market

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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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.

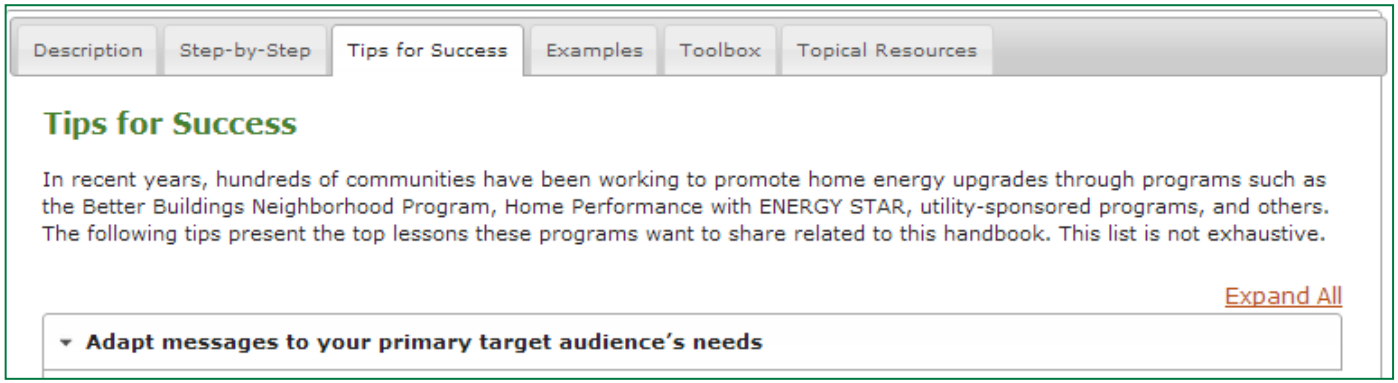
- Keep the program simple for your custo
- Provide the customer with a single point
- Make upgrade options clear and concise
- Keep the program simple for your contra
- Emphasize the action you want your cus
- Measure and evaluate performance at k

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)



In Their Own Words: Benefits of Market Segmentation

Source: U.S. Department of Energy, 2012.

In Their Own Words: Messaging to Motivate

Source: U.S. Department of Energy, 2012.

Handbooks - Examples

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

Financing – Communicate Impacts

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

Examples

The following resources are examples from individual residential energy efficiency programs, which include case studies, program presentations and reports, and program materials. The U.S. Department of Energy does not endorse these materials.

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
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 BetterBuildings-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 assessments, inspections, improvements, and loan origination, while learning valuable lessons along the way.

Using Credit Enhancements to Leverage Existing CDFI Capacity: Indianapolis EcoHouse Project Loan Program **(433 KB)**
Author: Lawrence Berkeley National Laboratory
Publication Date: 2012
Highlights the EcoHouse Project Loan Program, which provides fixed interest rate loans as a tool for enabling energy improvements among households that are otherwise unlikely to be able to access affordable financing at market rates.

Handbooks - Toolbox

Toolbox: Templates, forms, tools, calculators

Evaluation & Data Collection – Conduct Evaluation

Where Am I? Subscribe PDF version Print this page

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

Toolbox

The following resources are available to help design, implement, and evaluate possible activities related to this handbook. These resources include templates and forms, as well as tools and calculators. The U.S. Department of Energy does not endorse these materials.

Templates & Forms

Los Angeles County Energy Issues Phone Survey **(194 KB)**
Author: Los Angeles County, California
Publication Date: 2010
Sample script Los Angeles County used to survey homeowners about energy issues.

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 workshop participants. The workshop allowed the program to share its energy efficiency offerings with homeowners.

EnergySmart Residential Survey **(81 KB)**
Author: Boulder County Energy Smart
Publication Date: 2013
Example survey about a homeowner's experience with a visit from an energy advisor as part of EnergySmart in Boulder County, Colorado.

Handbooks – Topical Resources

Topical Resources: Presentations, publications, webcasts

Contractor Engagement & Workforce Development – Deliver Program

Where Am I? Subscribe PDF version Print this page

Description | Step-by-Step | Tips for Success | Examples | Toolbox | 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 and about individual programs.

Topical Presentations

The Contractor-Participation-Inducing Home Performance Program Design Recipe Part 1
Author: Mike Rogers; OmStout Consulting; LLC
Publication Date: 2012
Presentation summarizing the important elements needed to induce and sustain contractor participation in home performance programs.

Five Steps to a Profitable Contractor Base **(2 MB)**
Author: Courtney Moriarta; SRA International; Inc.; Emily Levin; Vermont Energy Investment Corporation; Tiger Adolf; Building Performance Institute; Brad Geyer; Fayette County Better Building Initiative; Sammy Chu; Suffolk County Department of Labor; Sam Flanery; Building Science Academy
Publication Date: 2012
Presentation on five steps to building a profitable contractor base. The steps include sensible program design and administration, certification and credentialing, communicating with contractors, contractor requirements (business vs. trade), and training and sales support.

Residential Contracting Business Boot Camp **(40 MB)**
Author: Mike Rogers; OmStout Consulting; LLC
Publication Date: 2013
This presentation provides guidance to contractors on business fundamentals, marketing and lead generation, successful consultative selling and closing, and measuring and improving performance.

Handbooks – Quick Links

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

Market Position & Business Model – Overview

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Quick Links

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

- **Business Models for Providing Energy Efficiency Services**
  Every organization or business has a particular set of motivations and revenue generating opportunities that comprise their business model. Typical business models for providing energy eff documented for utility and non-utility program administrators, remodelers, HVAC (heati tractors, home performance contractors, home inspectors, utilities, energy servi
- **Cost-Effectiveness Tests**
  Cost-effectiveness tests compare the benefits of a utility or non- fficiency with its associated costs. The five most common tests used by public uti t test (PCT), the utility/program administrator cost test (PACT), the ratepayer imp ce cost test (TRC), and the societal cost test (SCT).
- **Non-Energy Benefits**
  Energy efficiency programs provide identifiable benefits beyond energy savings, such as job creation, economic development, avoided emissions, and water savings. Quantifying these non-energy benefits may help program administrators demonstrate progress toward stated program and/or policy goals, or increase general awareness and support for program activities.
- **Policies and Regulations Impacting Energy Efficiency Programs**
  Policies and regulations, such as energy efficiency targets, utility cost-effectiveness tests, financial regulations, and others, influence how your organization provides energy efficiency services.

Future feature: Clicking on a topic name will provide access to related resources

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 | Ex

Description

Successful energy efficiency prog... address
opportunities, and challenges of their local ma
likely to succeed aren't those that pick progra
options. Instead, you should develop a coord
elements that are designed to overcome multi
the greatest fit of your program to your local
your program is tailored to your specific marke
on:

- Your market assessment, which identified
market. Your program will be designed to sei
overcome the barriers to adopting energy ef
- Your program goals and objectives, which
seeks to achieve.
- Your partners who will help you deliver th
understanding of local contractors and their

If your organization has a detailed business pl
program design. If your organization does not
decisions as you develop your program design

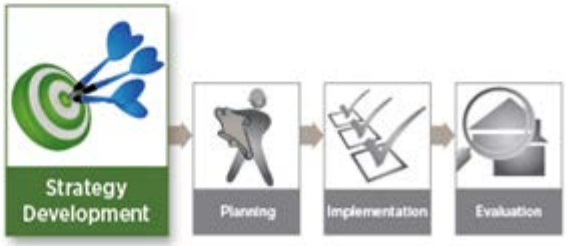
Program Design & Customer Experience – Make Design Decisions

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



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Navigation & Functionality

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About (If You Want a Refresher) (1 of 2)

About

In recent years, hundreds of commu
programs such as the Better Buildings

The Better Buil ngs Residential Progr
collected from e experience of these
evaluate resid al energy efficiency p

- Content
- Organization
- Acknowledgments

Note

This version of the
not include all co
content, and provi

The Residential P
back often as we

Content

The content in the Residential Program Solution Center reflects the expertise and experience of the U.S. Department of Energy's Better Buildings Residential program staff and consultants, Better Buildings Neighborhood Program grant recipients and partners, Home Performance with ENERGY STAR Sponsors, DOE's Office of Energy Efficiency & Renewable Energy (EERE) Technical Assistance Program, and existing program guidance published by a variety of organizations working to improve energy efficiency in residential buildings across the country. All content is based on qualitative and quantitative evidence of lessons learned and best practices from energy efficiency programs. Third party experts will be reviewing the content and linked materials within this beta version of the Solution Center. Visitors to the Solution Center are invited to submit additional content or materials for possible inclusion by emailing: BBRPSolutionCenter@erg.com.

program achievements as well as opportunities for making program improvements.

- **Marketing & Outreach** – Spur consumer demand for your program's services by understanding your target audience and motivating them to act using effective messaging, marketing and outreach tactics, and attractive program offers.
- **Financing** – Ensure that your program's customers will have access to affordable financing, so they can pay for the

Acknowledgments

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- Erick Shambarger, Milwaukee Office of Environmental Sustainability & Me^2 program
- Suzanne Shelton, Shelton Group

How to Use This Tool (2 of 2)

How to Use This Tool

The Better Buildings Residential Program Solution Center was designed in 2013 as a repository for key lessons, resources, and knowledge collected from the experience of these efforts. It is intended to help program administrators and their partners plan, implement, manage, and evaluate residential energy efficiency programs.

- What You Will Find
- Find What You Need
- Register to Customize Your Solution Center Content

What You Will Find

The Better Buildings Residential Program Solution Center presents information in a series of handbooks organized around the primary functions typically overseen by a residential energy efficiency program administrator, termed "program components" in this tool:

- **Market Position & Business Model** – Identify your organization's preferred market position by assessing existing market actors, gaps, competitors, and potential partners. Develop a business model that will allow you to deliver energy efficiency services.
- **Program Design & Customer Experience** – Design a residential energy efficiency program that integrates marketing and outreach, contractor coordination, incentives, financing, and program evaluation to provide customers with the products and services they want through a customer-centric process.
- **Evaluation & Data Collection** – Develop evidence-based insights into your program's performance through third-party process and impact evaluations. Learn how to develop effective data collection strategies and timely evaluations to identify important program achievements as well as opportunities for making program improvements.
- **Marketing & Outreach** – Spur consumer demand for your program's services by understanding your target audience and motivating them to act using effective messaging, marketing and outreach tactics, and attractive program offers.
- **Financing** – Ensure that your program's customers will have access to affordable financing, so they can pay for the services you offer.
- **Contractor Engagement & Workforce Development** – Support and partner with the workforce who will deliver your program's energy efficiency services by understanding their capacity, recruiting contractor partners, enabling technical training and business development support, fostering clear communication, and refining program processes over time, in partnership with your workforce.

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

Description	Provides information about why the handbook is important and describes what someone will learn by working through it.
Step-by-Step	Provides detailed *what* and *how* information related to the handbook topic that program administrators need to be successful (e.g., key steps; relevant lessons, tips, and best practices; program design options).
Tips for Success	Provides lessons learned related to the handbook topic based on qualitative multi-source evidence that can help program administrators be successful.
Examples	Provides access to case studies, program presentations and reports, and program materials specific to individual residential energy efficiency upgrade programs.
Toolbox	Provides access to templates, forms, tools, and calculators that can be used to help design, implement, and evaluate activities related to the handbook topic.
Topical Resources	Provides access to presentations, publications, and webcasts related to the handbook that are topical in nature, rather than program-specific.
Quick Links	Provides links to resources and materials in the Solution Center related to the key topics listed.

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Organized by program component and design phase

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- Stage Handbooks

Program Design Phases	Market Position & Business Model	Program Design & Customer Experience	Evaluation & Data Collection	Marketing & Outreach	Financing	Contractor Engagement & Workforce Development
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Energy Data Facts

Following are data points and sources that programs and their partners frequently request from the U.S. Department of Energy when planning, evaluating, or marketing their programs.

National Residential Energy Facts

1. What percentage of total U.S. energy consumption is made up of consumption from the residential sector?
   - Households account for 21.4% of total energy consumption in the United States.
     Calculations based on data from: Annual Energy Outlook 2014 Early Release, Table 2: Energy Consumption by Sector and Source, U.S. Department of Energy, 2014.
2. What does the average U.S. household spend per year on its energy bills?
   - The average household spends $2,024 on residential energy annually, including heating, cooling, water heating, appliances, lighting, and electronics.
     Source: Residential Energy Consumption Survey 2009, Table CE1.1: Summary totals and intensities, U.S. homes, U.S. Department of Energy, 2012.

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Glossary

Glossary

Note

The glossary is a work in progress. The terms and definitions listed are only a partial list. The glossary will ultimately include all key terms and definitions used in the Better Buildings Residential Program Solution Center.

- **Accreditation** – Confirmation that contractors meet third-party criteria for business practices and standards (e.g., carrying insurance, employing certified workers).
- **Assessment** – A series of tests in a home or building that reveals opportunities for improved energy efficiency, such as poor insulation and air leaks. Also known as "audit" or "evaluation."
- **Assessor** – A person who performs a series of tests in a home or building that reveals opportunities for improved energy efficiency. Also known as "energy professional," "auditor," or "home energy expert."
- **Business case** – Demonstration of the value of energy efficiency programs in terms of costs and benefits, cost-effectiveness, or other performance measures.
- **Business model** – The overarching administrative and financial model for energy efficiency programs and/or participating contractors.
- **Certification** – Verification that workers meet third-party standards to perform work.
- **Co-branding** – An arrangement that associates a single service with more than one brand; in the context of energy efficiency programs, an organization might promote the use of its brand by a partner or contractor in marketing materials.
- **Co-marketing** – An arrangement in which programs and contractors or other partners jointly market the program, including using program-generated materials to which partners can add their own brand or marketing information (e.g., door hangers, yard signs).
- **Community outreach partner** – Public, private, and/or nonprofit institutions that assist with raising customer awareness about program services (e.g., community organizations, media outlets, social marketers, fuel dealers).
- **Contractor** – A private company providing energy efficiency upgrade services to customers (e.g., remodelers, heating ventilation and air conditioning [HVAC] contractors); often programs will have a list of approved, qualified, and/or enrolled contractors.
- **Contractor qualifications** – Certification, accreditation, training, and/or other technical standards and skills established by energy efficiency programs that contractors must meet in order to participate in the program.

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Filter All Content by content type or other filters

Items per page

100 Apply

$20 Billion Bonanza: Best Practice U for the Southwest

Author: Southwest Energy Efficiency Project
Publication Date: 2012
This report explores the best practices that utilities should undertake in the development and implementation of energy efficiency programs. The report calculates the impact that investing in energy efficiency will have on jobs, household income, and state and regional economies, along with the other public health benefits such as reducing pollution.

10 New Year's Resolutions to Keep the Customers Coming
Author: Home Energy Magazine
Publication Date: 2013
This article provides 10 tips home energy contractors can use to update their marketing outreach and improve their customer service.

20-Unit Windham Apartment Building Gains Energy Savings and Comfort
Author: Efficiency Maine
Publication Date: 2013
This case study highlights a 20-unit apartment building that gained energy savings and comfort through Efficiency Maine.

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 upgrades and the opportunities that exist for new home performance contractors; start-up needs and costs for firms entering the home performance contracting industry; home performance business approaches; and how established home performance contractors attract customers. It also contains detailed profiles of eight successful home performance firms across the United States.

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Search found 605 items

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- Tools & Calculators (27)

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- Program Design & Customer Experience (128)
- Evaluation & Data Collection (111)
- Marketing & Outreach (196)
- Financing (149)
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- Planning (284)
- Implementation (325)

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- Program Design Phase
- State or Territory
- Customer Income
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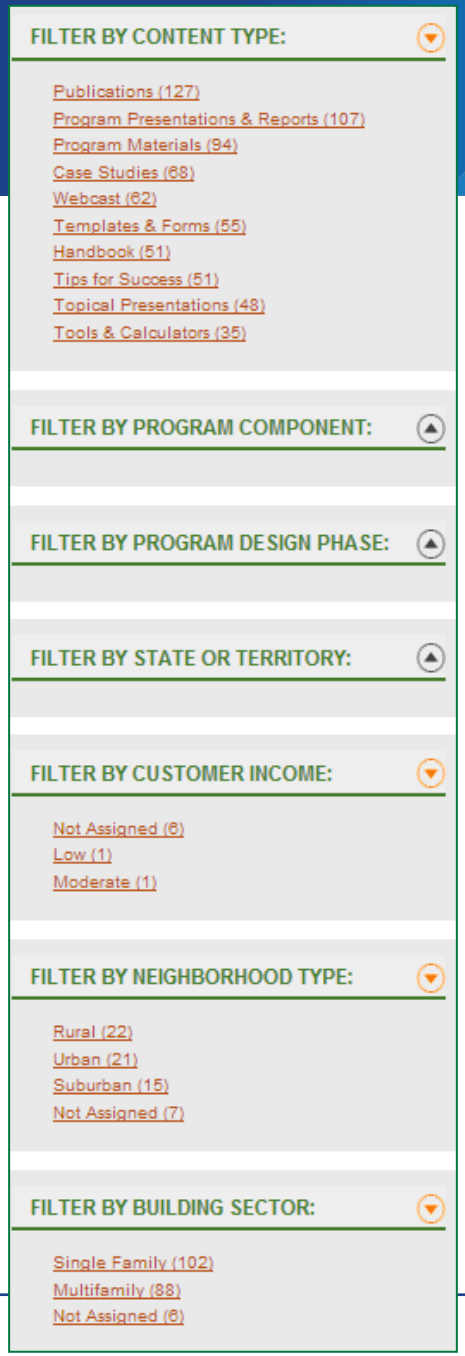

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program funding

SEARCH

BBNP Search

Enter your keywords

program funding

Search

Search results

Think broadly about potential funding sources and program administration partners

Clean Energy Program Funding: EPA Local Climate and Webcast Series
Presentation
Three-part webinar series. Part I discusses how to design and implement funding programs, line up partners, and gain support for clean energy programs through both conventional and non-conventional methods. Part II discusses how to locate available sources of funding. Part III explains how to leverage existing funds and make clean energy investments more affordable for clean energy program audiences.

Expanding North Carolina Energy Efficiency and Renewable Lending Programs: Market Snapshot
This market assessment evaluates lending options for funding energy efficiency upgrades in North Carolina.

What's Working in Residential Energy Efficiency Upgrade Programs: Greater Cincinnati Energy Alliance
Presentation on the organization, funding structure, and market focus of the Greater Cincinnati Energy Alliance.

Part I: Getting Started: Answering Big Picture Funding Questions
Presentation 1, Presentation 2, Presentation 3, Presentation 4, Transcript
This webcast (Part I of a three-part series) covers the big picture questions that local governments should consider for funding clean energy programs. What resources are available? What are the program priorities? How can these programs pay for themselves? What funding is available?

CURRENT SEARCH

Search found 12 items
program funding

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- Handbook (5)
- Program Presentations & Reports (2)
- Publications (2)
- Webcast (2)
- Tips for Success (1)

FILTER BY PROGRAM COMPONENT:

- Market Position & Business Model (7)
- Program Design & Customer Experience (2)
- Financing (4)

FILTER BY PROGRAM DESIGN PHASE:

- Overview (2)
- Strategy Development (9)
- Planning (6)
- Implementation (4)
- Evaluation (1)

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- Based on keywords, titles, and filter meta data
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- Use filters to further refine results.

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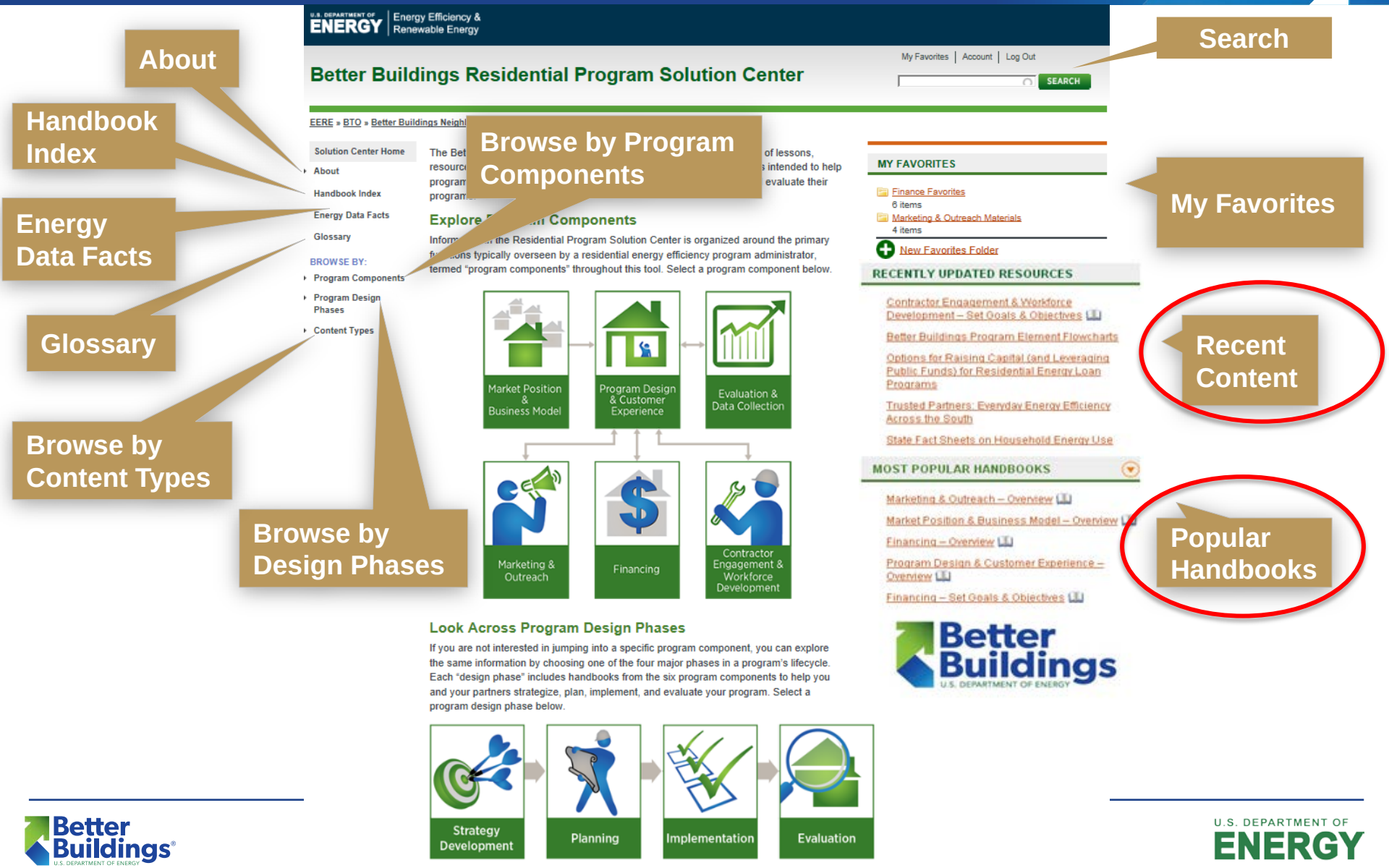

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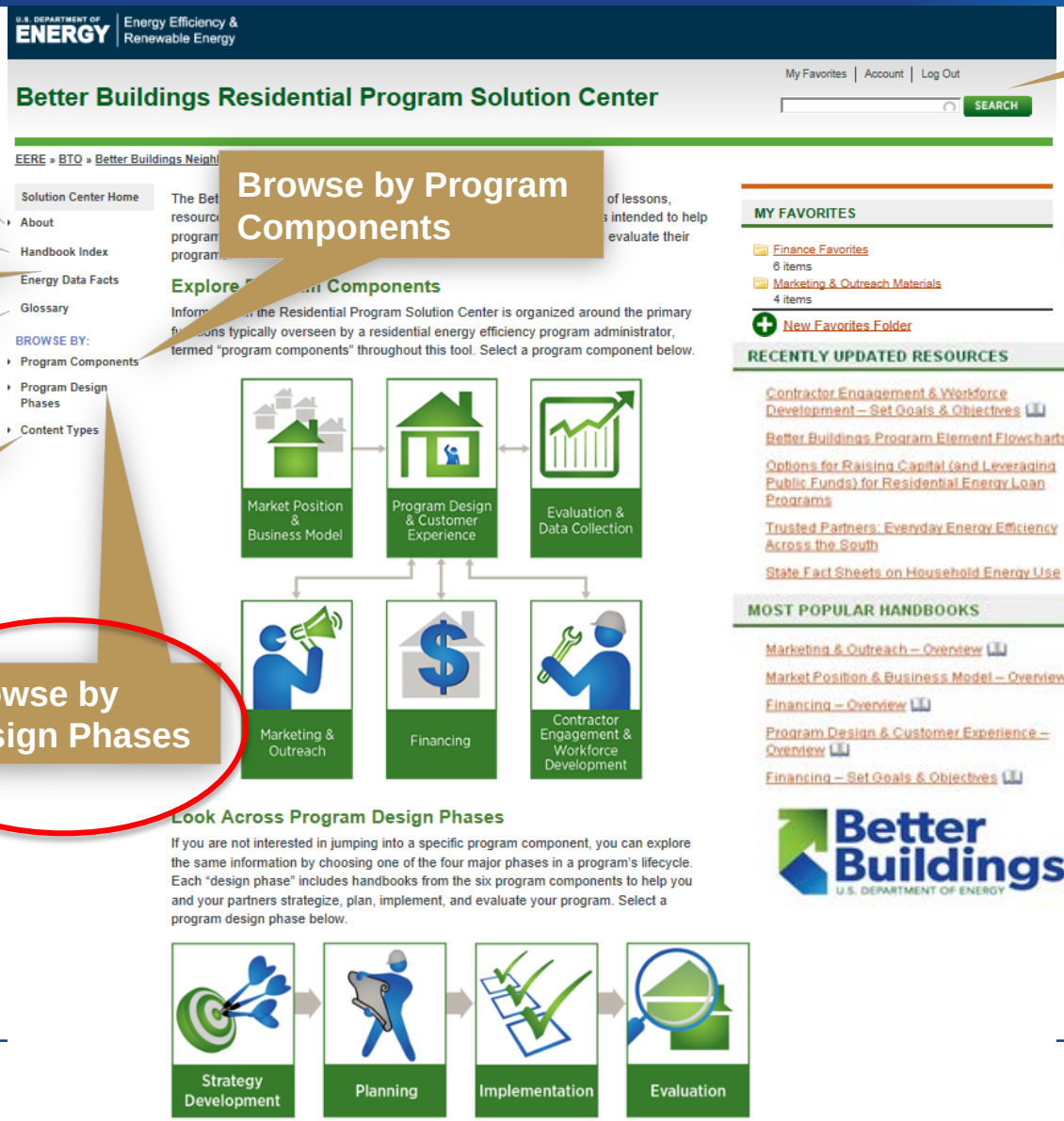

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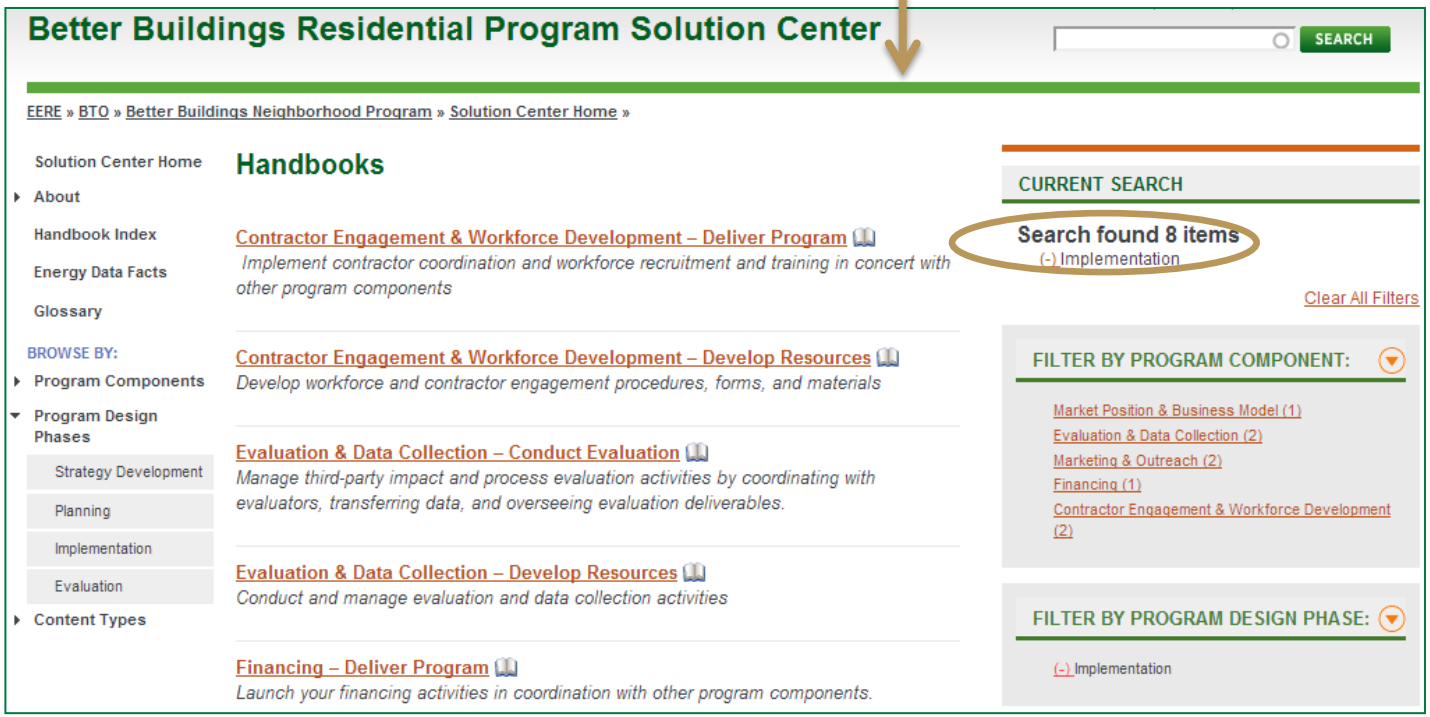

Better Buildings Residential Program Solution Center

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- Program Components
- Program Design Phases
- Content Types

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

Explore Program Components

Information in the Residential Program Solution Center is organized around the primary functions typically overseen by a residential energy efficiency program administrator, termed "program components" throughout this tool. Select a program component below.

Look Across Program Design Phases

If you are not interested in jumping into a specific program component, you can explore the same information by choosing one of the four major phases in a program's lifecycle. Each "design phase" includes handbooks from the six program components to help you and your partners strategize, plan, implement, and evaluate your program. Select a program design phase below.

RECENTLY UPDATED RESOURCES

- Financing – Assess & Improve Processes
- Program Design & Customer Experience – Make Design Decisions
- Financing – Deliver Program
- Contractor Engagement & Workforce Development – Develop Evaluation Plans
- Part III: Keeping it Going: Financing Options for your Clean Energy Programs

MOST POPULAR HANDBOOKS

- Marketing & Outreach – Overview
- Market Position & Business Model – Overview
- Financing – Overview
- Program Design & Customer Experience – Overview
- Market Position & Business Model – Assess the Market

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Evaluation & Data Collection – Overview

Where Am I? | Subscribe | PDF version | Print this page

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

Description

As the manager of an energy efficiency program, you need to be asking questions about the performance of your program. *How well is the program accomplishing its objectives? How effective are the marketing campaigns? How satisfied are participants with the available incentives, including any financing offered? Just how much of a difference are we making in the local home improvement market? Is the program cost-effective? How can we improve program performance?* Questions like these —about performance and outcomes—ultimately involve evaluation of the effects of a program.

Key Resources

- Energy Efficiency Program Impact Evaluation Guide provides an overview of the basic objectives, structure, and approaches that can be used to plan and conduct impact evaluations of efficiency programs.

There are three common types of energy efficiency program evaluations: impact, process, and market effects. These can include a wide range of assessment studies to determine the effects of a program. These include understanding or documenting:

- Program performance
- Program or program-related markets and market operations
- Program-induced changes in energy efficiency markets

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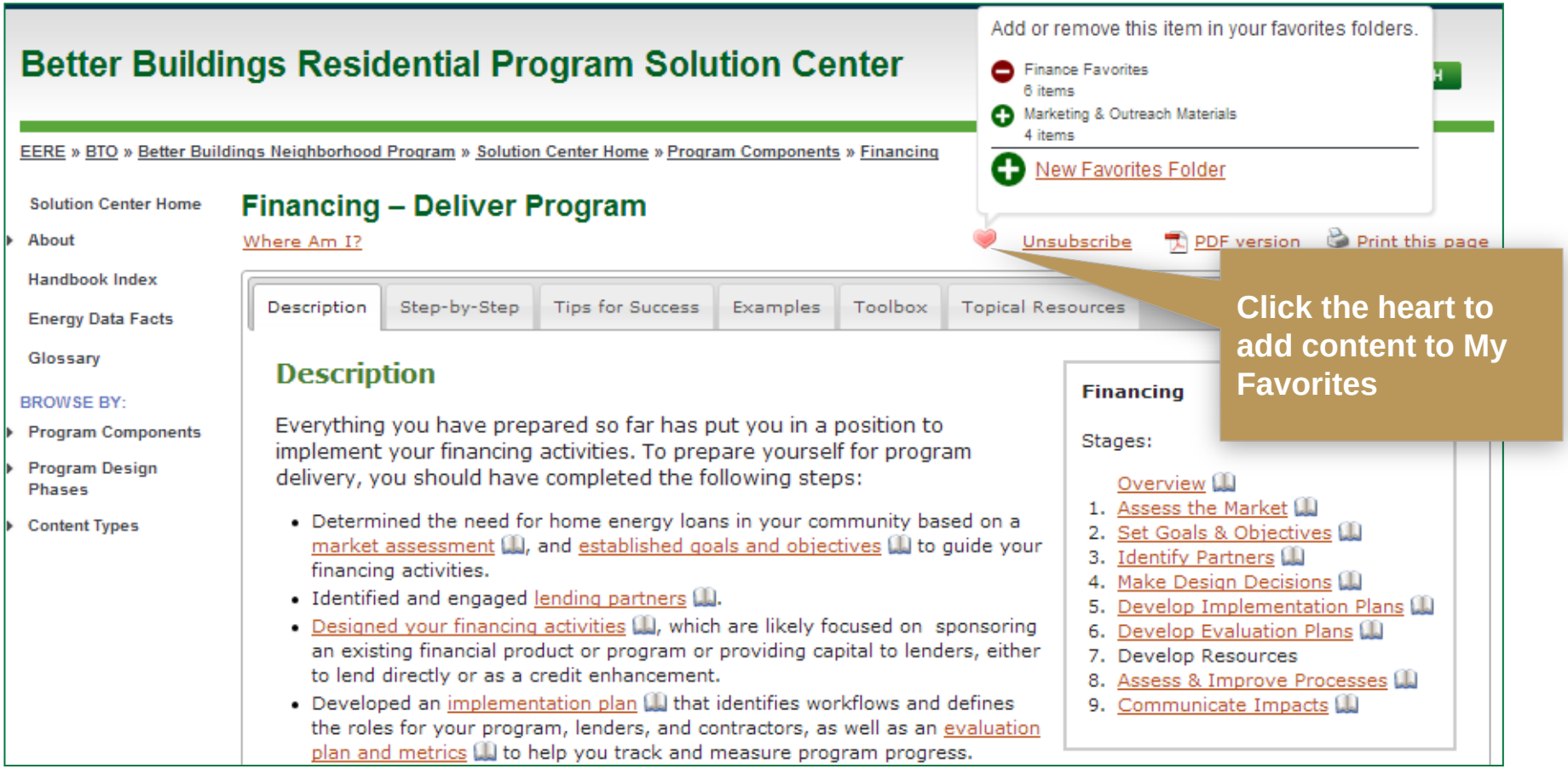

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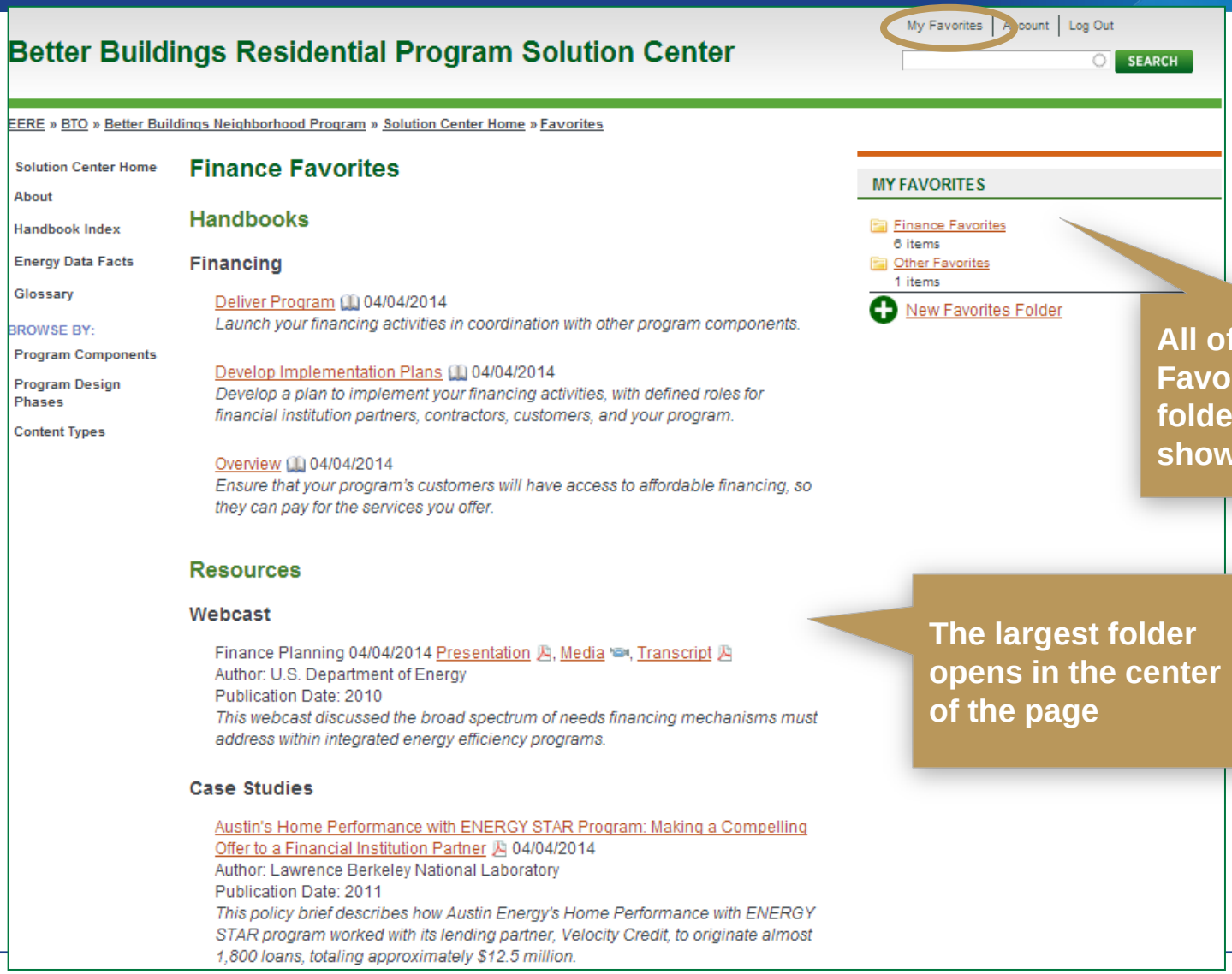

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My Favorites – Adding Resources

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

Add or remove this item in your favorites folders.

Finance Favorites
6 items

Other Favorites
1 items

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.

Better Buildings Residential Program Solution Center

Examples

U.S. DEPARTMENT OF ENERGY

Examples: Six Options (for today)

1. *I know many of my target customers are going to need help financing their upgrades.* **How should I approach a financial institution about making loans available?**
2. *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 assess the market?**
3. **How do I develop an RFP** *to procure the services I need for my program*?
4. *I am supposed to explore options for* **setting up a quality assurance** *program. Where do you talk about that?*
5. *I've found a lot of useful ideas and examples about* **marketing and outreach** *across the Solution Center. How do I save the materials so I can refer to them later?*
6. *What are other programs doing to* **engage and train their contractors?**

Example #1 (1 of 5)

I know my target customers are going to need help financing their upgrades. How should I approach a financial institution about making loans available?

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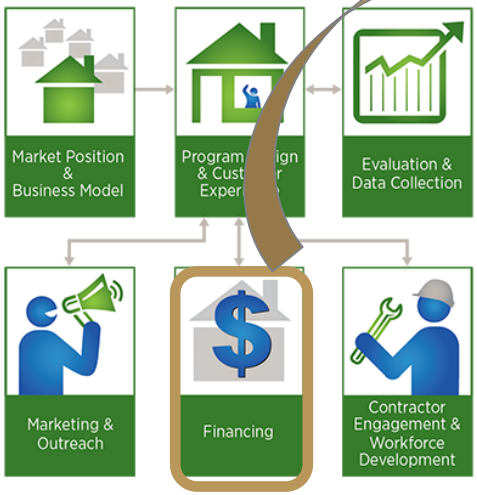
- Program Design Phases
- Content Types

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

Explore Program Components

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



Look Across Program Design Phases

Better Buildings® U.S. DEPARTMENT OF ENERGY

Financing – Overview

Where Am I?

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

Description

Customer access to affordable sources of financing can be an important part of successfully converting interest in your program into a completed home energy upgrade. Financing can help homeowners afford an energy upgrade by allowing them to pay for the improvements incrementally over time. The financed costs of energy upgrades may even be partially or entirely offset by energy cost savings from the installed measures during the loan repayment period.

While many contractors have used financing to increase the sales of all types of home improvement projects, recently contractors have begun using financing to drive the sale of home energy upgrades. In the past, the energy efficiency industry relied primarily on rebates that pay for only part of the cost of the energy upgrades to drive uptake. Financing applied to energy upgrades is a strategy that has begun to take hold over the last several years, with major new financing initiatives in California, Pennsylvania, Michigan, New York, Oregon, and many other states.

Financing can offer some key benefits to your program:

1. Financing allows your customers who don't have "cash in hand" to purchase energy upgrades, increasing overall uptake of energy efficiency measures in your community. Unlike rebates, financing can cover the full cost of an efficiency upgrade.
2. Financing allows your customers to purchase higher-cost upgrades than they might otherwise find possible, which can result in deeper energy savings. Early assessments of federal Recovery Act grantee finance programs show that those customers using financing consistently install larger projects with deeper energy efficiency savings than those without financing.

Financing does however have limitations, and is not by itself a robust enough tool to make a residential energy efficiency program successful. Specifically:

Key Resources

- Clean Energy Finance Guide for Residential and Commercial Building Improvements provides a collection of knowledge on the development of energy efficiency financing programs.
- DOE State and Local Solution Center: Financing for Energy Efficiency and Renewable Energy provides a wealth of tactical information for state and local governments working to set up financing programs.
- Energy Efficiency Financing Program Implementation Primer provides an overview of considerations for designing and implementing successful energy efficiency financing programs for existing buildings in the residential sector.
- Clean Energy Financing Programs: A Decision Resource for States and Communities describes financing program options, key components of these programs, and factors for states and communities to consider as they make decisions about getting started or updating their programs.
- Financing Program Decision Tool provides information on the different types of financing available and helps users identify the best options for their program.

Example #1 (2 of 5)

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

Step-By-Step

The following steps list important activities for successful program administrators to take 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 step to access its handbook.

Assess the Market
Determine how your target audience curren funds energy e cy services, to what extent upfront cost is a barrier, and whether improvements to their financing ons would increase uptake of energy efficiency measures.

Set Goals & Objectives
Establish goals, objectives, and timefra for your financing act

Identify Partners
Identify and partner with financial institutions that can provide ca customers to access financing.

Make Design Decisions
Determine if enhancements to existing financing products or the achieve your goals and objectives.

Develop Implementation Plans
Develop a plan to implement your financing activities, with define customers, and your program.

Develop Evaluation Plans
Establish an evaluation plan that will allow you to determine how

Develop Resources
Develop the procurement, outreach, and loan support resources r

Deliver Program
Launch your financing activities in coordination with other progra

Assess & improve Processes
Focus on the continuous improvement of your financing activities modifying strategies when needed.

Communicate Impacts
Communicate the results of your financing activities to internal a

Financing – Identify Partners

Where Am I? | Subscribe | PDF version | Print this page

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

Description

To help homeowners finance their home energy upgrades, you must develop relationships with lenders in alignment with your program's goals and objectives. Most residential energy efficiency programs either are not organized to directly provide loans to consumers or need to leverage private capital to support their financing strategy. Lending partners can:

- Accept loan applications
- Conduct loan pre-approvals
- Underwrite loans
- Originate and fund loans
- Maintain a portfolio of loans to maturity
- Service loans and collect on non-performing loans
- Partner on outreach strategies to identify and reach new customers
- Attract additional sources of capital or recapitalize the energy efficiency loan pool

This handbook describes the types of lenders that might be able to offer capital and services for your program. It also describes the process for engaging lenders, soliciting partnership proposals, and developing and negotiating a lending agreement.

Lending partners can become an important member of your program team and drive demand for your services. In addition to having the expertise and ability to provide loan products tailored to the needs of your community, some program administrators have found that lending partners can connect programs with potential customers that they might not otherwise have been able to reach. For example, credit unions and banks can market energy efficiency loan products to their customers.

Financing

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

Example #1: Financing Step-by-Step (3 of 5)

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 partne accessing loans for their home energy upgrades. Entering into a parallel with making financing design decisions. Regardless of financial partners in the program design process.

To establish relationships with lenders that will offer consumer fi the following steps:

- Identify lenders
- Engage lenders
- Determine the process for soliciting proposals from prospe
- Evaluate proposals
- Negotiate and execute the lending agreement

Identify lenders

The financial industry includes a range of lending institution types. Each potential lender will have its own goals and unique perspectives. It is up to you to decide the best lending partners for the program that you will be delivering.

To encourage lenders to participate in your program, take their interests, concerns, and regulatory or other constraints (e.g., service area and locations of bank branches, if a local lender) into consideration from the start.

- Community, commercial, regional and national banks are for-profit entities, with regulatory requirements and their own banking policies to which they must adhere.
- Some banks will want to participate in nontraditional lending as a means to support new market opportunities or to comply with regulatory requirements, such as the Community Reinvestment Act.
- Community development financial institutions (CDFIs) may offer more flexible loan qualification terms for reaching a wider market, such as low or moderate income households, and may also be restricted by charter to only serving income-eligible customers.
- Credit unions and community banks may be willing to develop more flexible lending products for their customers' needs or to expand their customer base.
- Some banks may be seeking out niche markets, while others may simply want to service loans for a fee and not assume any risks.

Historically, credit unions, community banks, CDFIs, and national lenders already specializing in energy efficiency loans have been more receptive to partnerships with residential energy efficiency programs.

- These institutions may be more interested in developing new products (e.g., unsecured loans backed by credit enhancements) and incorporating non-traditional qualifying criteria (e.g., utility bill repayment history).
- They may be more willing to consider the secondary benefits of attracting new customers such as improving the overall financial health of their local market or cross-selling other financial products.
- Local lenders are often more responsive to their customers' needs and are more inclined to create a niche lending product if they believe it will provide value to their customers.

National and regional lenders can offer home energy upgrade loans through conventional products such as home equity loans, home equity lines of credit, or signature loans. Few have offered specific residential energy efficiency loans. Most have typically wanted to see more detailed loan performance data for energy efficiency loan products than what has been available. Additionally, their business models traditionally focus on high volumes, large loan sizes, and low transaction cost products which have not matched well with residential energy efficiency.

Learn more about clean energy lending from the lender perspective in Chapter 8 of DOE's *Clean Energy Finance Guide for Residential and Commercial Building*, "Clean Energy Lending from the Financial Institution Perspective."

Example #1: Tips for Success (4 of 5)

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

Engage with potential lending partners early and closely, and make a clear and specific business case for their involvement

Back to Top

Engage with potential lending partners early and closely, and make a clear and specific business case for their involvement

Strong partnerships with lenders are critical to successful financing offerings. Many Better Buildings Neighborhood Program partners found that engaging potential lending partners early in the design process helped them to better understand both lender needs and the risks and opportunities of different financing strategies. Some lenders may perceive home energy lending to be too risky or not profitable enough for them to get involved. Engaging lenders early allows programs to make the business case for their involvement, which can include cross-selling customers into other profitable financial products at high rates; low customer default rates; and low customer acquisition costs due to program marketing. Many energy efficiency financing initiatives have been met with low (or, in some cases, no) lender interest—or have struggled to sell loan pools to private investors—because programs have developed loan products without engaging stakeholders to understand their needs.

- Since 2004, Austin Energy has fostered a strong partnership with Velocity Credit Union to offer residential energy efficiency and solar systems financing to its customers; first as a Home Performance with ENERGY STAR sponsor and then as a Better Buildings Neighborhood Program partner. Velocity Credit Union offers loans for upgrades to heating and cooling systems, Home Performance with ENERGY STAR whole home upgrades, and installation of solar electric and hot water systems. Velocity Credit Union has found that partnering with Austin Energy provides several compelling benefits, including low cost of customer acquisition for its other lending products and increased visibility through marketing and outreach. In addition, access to Austin Energy's rigorous quality assurance process ensures that loan-funded work is performed properly by qualified contractors. Between 2010 and 2013, Austin Energy's single-family and multifamily programs have resulted in the completion of more than 3,500 energy upgrades with an expected annual energy savings of over 20%, or about $2 million per year in savings for program participants. Between October 2012 and December 2013, 461 home energy loans were closed, totaling $3.8 million.

Example #1: Resources (5 of 5)

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

Case Studies

NYSERDA's Green Jobs–Green New York Program: Extending Energy Efficiency Financing to Underserved Households

Author: Lawrence Berkeley National Laboratory
Publication Date: 2011
Discusses innovative financing options designed to expand the accessibility of energy efficiency financing to households that typically do not qualify for traditional loans.

Austin's Home Performance with ENERGY STAR Program: Making a Compelling Offer to a Financial Institution Partner

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.

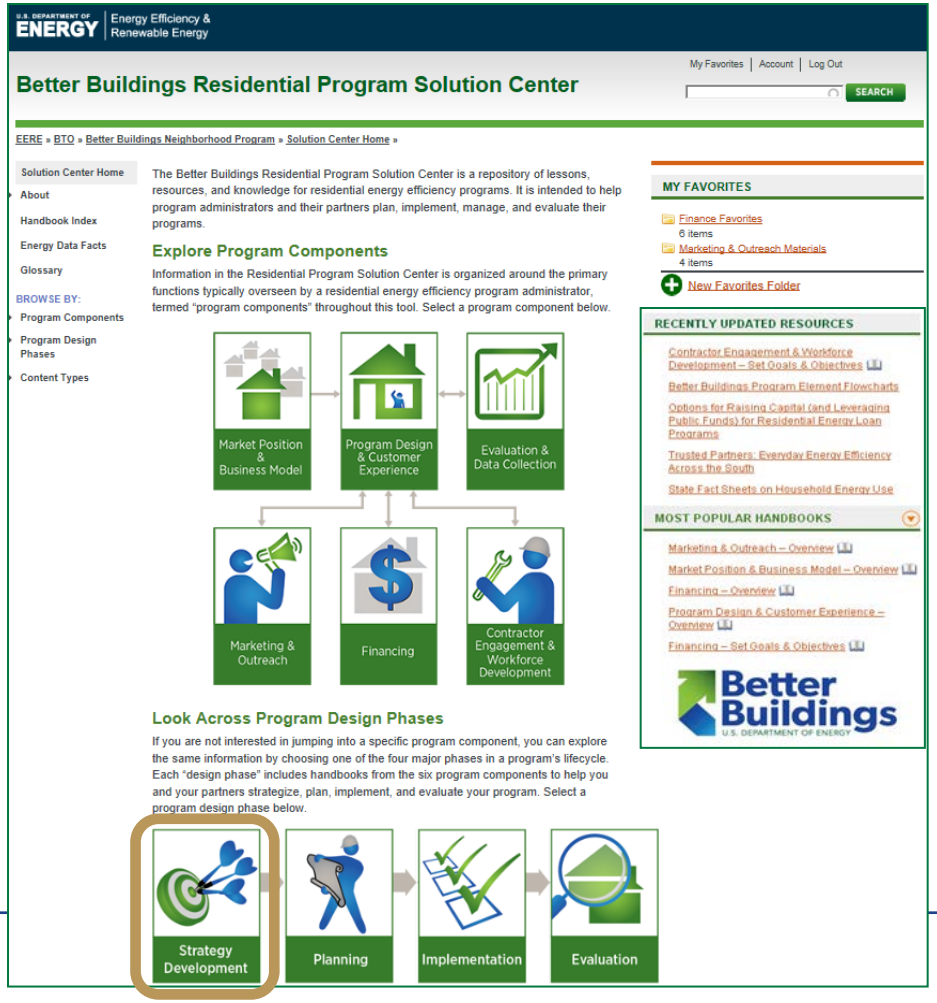
Description | Step-by-Step | Tips for Success | Examples | **Toolbox** | Topical Resources

Tools & Calculators

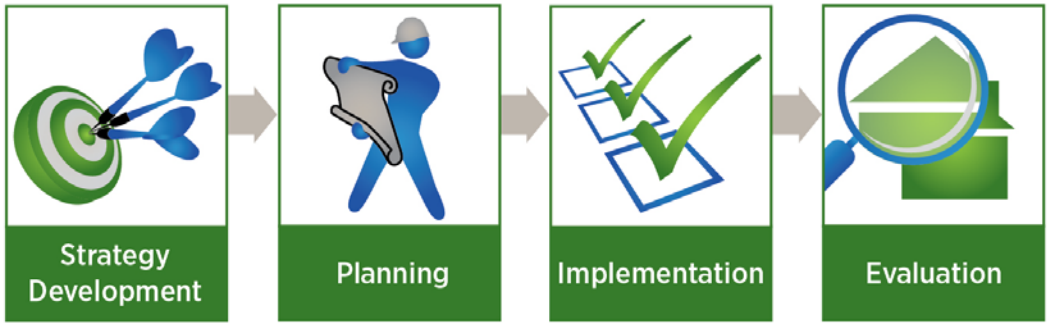
Financing Program Decision Tool
Author: U.S. Environmental Protection Agency
The Financing Program Decision Tool is for state and local governments just starting their clean energy financing programs. The tool provides information on the different types of financing available and helps users identify the best options for their program.

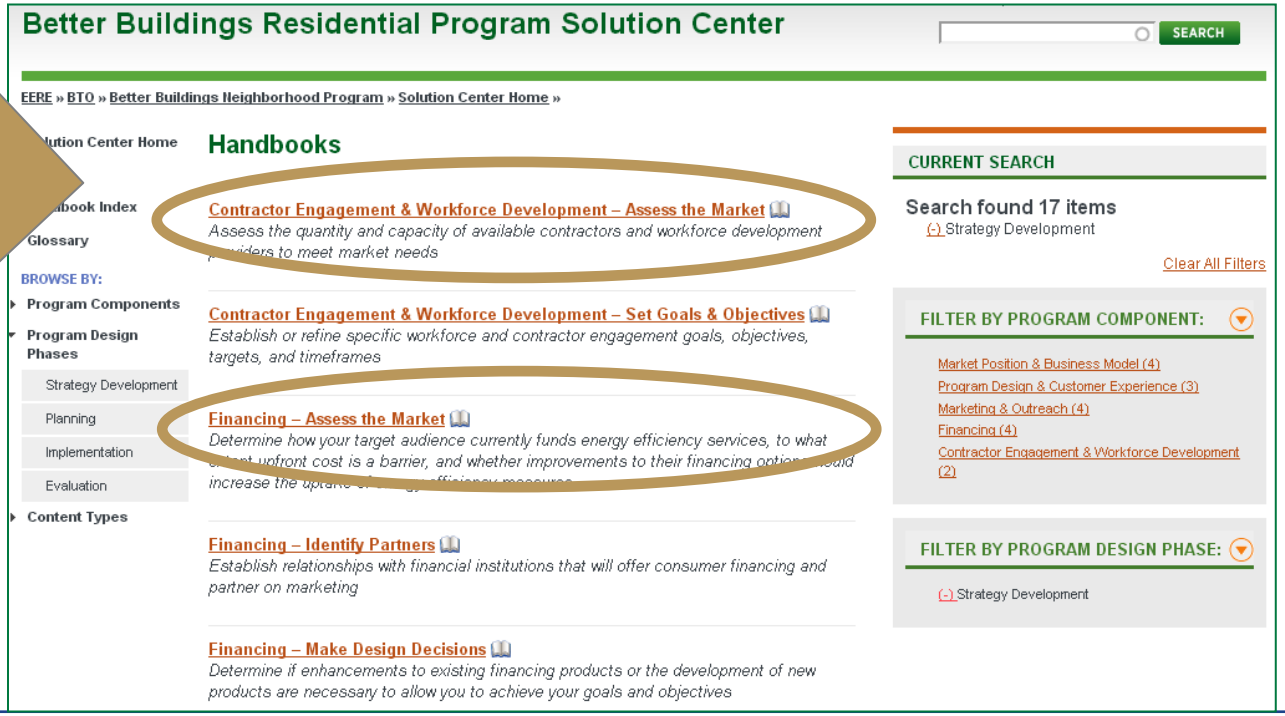
Example #2 (1 of 5)

Our program is starting soon and we need to research what the market for energy efficiency looks like in our community. What should I do to understand the market?



Example #2: Strategy Development (2 of 5)





Example #2: Handbook Index (3 of 5)

Program Components

Program Design Phases	Market Position & Business Model	Program Design & Customer Experience	Evaluation & Data Collection	Marketing & Outreach	Financing	Contractor Engagement & Workforce Development
	Overview	Overview	Overview	Overview	Overview	Overview
Strategy Development	1. Assess the Market 2. Set Goals & Objectives 3. Identify Partners 4. Make Design Decisions	1. Assess the Market 2. Set Goals & Objectives 3. Identify Partners 4. Make Design Decisions		1. Assess the Market 2. Set Goals & Objectives 3. Identify Partners 4. Make Design Decisions	1. Assess the Market 2. Set Goals & Objectives 3. Identify Partners 4. Make Design Decisions	1. Assess the Market 2. Set Goals & Objectives 3. Identify Partners 4. Make Design Decisions
Planning	5. Develop Implementation Plans 6. Develop Evaluation Plans	5. Develop Implementation Plans 6. Develop Evaluation Plans	1. Develop Evaluation Plans	5. Develop Implementation Plans 6. Develop Evaluation Plans	5. Develop Implementation Plans 6. Develop Evaluation Plans	5. Develop Implementation Plans 6. Develop Evaluation Plans
Implementation	7. Develop Resources	7. Develop Resources 8. Deliver Program	2. Develop Resources 3. Conduct Evaluation	7. Develop Resources 8. Deliver Program	7. Develop Resources 8. Deliver Program	7. Develop Resources 8. Deliver Program
Evaluation	8. Assess & Improve Processes 9. Communicate Impacts	9. Assess & Improve Processes 10. Communicate Impacts	4. Communicate Impacts	9. Assess & Improve Processes 10. Communicate Impacts	9. Assess & Improve Processes 10. Communicate Impacts	9. Assess & Improve Processes 10. Communicate Impacts

Example #2: Handbooks (4 of 5)

Market Position & Business Model – Assess the Market

Where Am I? Subscribe PDF version Print this page

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).

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

Find related information across other program components:

- Program Design & Customer Experience – Assess the Market
  Research and analyze the specific barriers, needs, and opportunities for a residential energy efficiency program in your community.
- Marketing & Outreach – Assess the Market
  Identify and prioritize potential target audiences based on their receptivity to energy efficiency services.
- Financing – Assess the Market
  Determine how your target audience currently funds energy efficiency services, to what extent upfront cost is a barrier, and whether improvements to their financing options would increase the uptake of energy efficiency measures.
- Contractor Engagement & Workforce Development – Assess the Market
  Learn about the capabilities and services of existing contractors and training providers working in your market.

Access Step-by-Step, Tips, and resources

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

Access related information across all program components

Example #2: Search (5 of 5)

My Favorites | Account | Log Out

Better Buildings Residential Program Solution Center

assess the market SEARCH

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

- Solution Center Home
- About
- Handbook Index
- Energy Data Facts
- Glossary

BROWSE BY:

- Program Components
- Program Design Phases
- Content Types

BBNP Search

Enter your keywords

assess the market

Search

Search results

Charleston SAVES: Market Assessment
Author: University of North Carolina Environmental Finance Center
Publication Date: 2010
This market assessment for CharlestonSAVES identifies the customers and potential demand for an energy efficiency upgrade financing program.

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.

Marketing & Outreach – Assess & Improve Processes
Monitor the effectiveness of marketing and outreach strategies and adapt as needed.

Home Energy Efficiency and Mortgage Risks
Author: University of North Carolina Center for Community Capital - Institute for Market Transformation
Publication Date: 2013
Study examining actual loan performance data to assess whether residential energy efficiency is associated with lower default and prepayment risks. Results show that default risks are on average 32 percent lower in energy-efficient homes, controlling for other loan determinants.

CURRENT SEARCH

Search found 53 items
assess the market

Clear All Filters

FILTER BY CONTENT TYPE:

- Handbook (37)
- Program Presentations & Reports (8)
- Case Studies (5)
- Publications (2)
- Program Materials (1)

FILTER BY PROGRAM COMPONENT:

- Market Position & Business Model (11)
- Program Design & Customer Experience (15)
- Evaluation & Data Collection (2)
- Marketing & Outreach (15)
- Financing (15)
- Contractor Engagement & Workforce Development (7)

FILTER BY PROGRAM DESIGN PHASE:

- Overview (6)
- Strategy Development (31)
- Planning (14)
- Implementation (6)
- Evaluation (6)

FILTER BY STATE OR TERRITORY:

- California (5)
- North Carolina (2)

Use filters to further refine results

Example #3 (1 of 3)

How do I develop an RFP to procure the services I need for my program?

Financing – Identify Partners

Where Am I?

Description | Step-by-Step | Tips for Success | Examples | Toolbox | Top

Step-By-Step

Developing strong working relationships with your lending partners w
customers in accessing loans for their home ene
more lenders can occur in parallel with makin
practice to involve prospective or formal financial

To establish relationships with lenders that will
efforts, consider the following steps:

- Identify lenders
- Engage lenders
- Determine the process for soliciting propos
- Evaluate proposals
- Negotiate and execute the lending agreem

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.

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 #3: Resources (2 of 3)

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

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 loan loss reserve funds to a financial institution partner.

Sample RFP: Greensboro Energy Efficiency Loan Products **(487 KB)**
Author: Better Buildings of Greensboro, North Carolina
Publication Date: 2011
A sample RFP from Greensboro, North Carolina, for energy efficiency loan products.

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

Templates & Forms

Financing Program Goals and Design Template Presentation Deck **(818 KB)**
Author: U.S. Department of Energy
Publication Date: 2011
Template for program administrators to fill out to help determine the goals and design of financing activities.

DOE Template Financial Institution RFP **(659 KB)**
Author: U.S. Department of Energy
Publication Date: 2010
A template competitive procurement procedure to award loan loss reserve funds to a financial institution partner.

Example #3: Search (3 of 3)

My Favorites | Account | Log Out

Better Buildings Residential Program Solution Center

RFP SEARCH

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

Solution Center Home
About
Handbook Index
Energy Data Facts
Glossary

BROWSE BY:
Program Components
Program Design Phases
Content Types

BBNP Search

Enter your keywords
RFP
Search

Search results

Strategic Marketing Services RFP (127 KB)
Author: Eagle County, Colorado
Publication Date: 2010
This is a sample request for proposals (RFP) from Eagle County, Colorado, for marketing services.

DOE Template Financial Institution RFP
Author: U.S. Department of Energy
Publication Date: 2010
A template competitive procurement procedure to award loan loss reserve funds to a financial institution partner.

Sample RFP: Michigan SAVES Loan Program
Author: Michigan Saves
Publication Date: 2010
Example RFP for the Michigan SAVES Loan Program, backed by a loan loss reserve fund.

Sample RFP: City of Independence, Missouri
Author: City of Independence, Missouri
Publication Date: 2010
A sample competitive procurement procedure to award loan loss reserve funds to a financial institution partner.

Financing Programs: RFP & Contract Terms and Conditions
Presentation, Media, Transcript
Author: U.S. Department of Energy
Publication Date: 2011
This webcast discusses financing program RFPs and contract terms and

CURRENT SEARCH

Search found 19 items
RFP

Clear All Filters

FILTER BY CONTENT TYPE:
- Program Materials (16)
- Program Presentations & Reports (1)
- Templates & Forms (1)
- Webcast (1)

FILTER BY PROGRAM COMPONENT:
- Program Design & Customer Experience (1)
- Evaluation & Data Collection (4)
- Marketing & Outreach (4)
- Financing (11)
- Contractor Engagement & Workforce Development (1)

FILTER BY PROGRAM DESIGN PHASE:
- Strategy Development (11)
- Planning (13)
- Implementation (13)
- Evaluation (2)

FILTER BY STATE OR TERRITORY:
- Colorado (3)
- North Carolina (3)
- Michigan (2)
- Washington (2)
- Alabama (1)
- California (1)
- Illinois (1)

Use filters to further refine results

Better Buildings U.S. DEPARTMENT OF ENERGY
U.S. DEPARTMENT OF ENERGY

Example #4 (1 of 4)

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

BBNP Search

Enter your keywords
quality assurance
Search

Search results

NYSERDA Quality Assurance Procedures (310 KB)
Author: New York State Energy Research and Development Authority
Publication Date: 2012
This section of NYSERDA's Home Performance Contractor Resource Guide describes quality control procedures for initial review, field inspection, and administrative review of projects. Supporting worksheets are available to assist with compliance and verification.

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

Quality Assurance and Enduring High Quality Work
Author: U.S. Environmental Protection Agency
Publication Date: 2011
Overview of quality assurance guidelines for Home Performance with ENERGY STAR.

Data Driven Quality Assurance & Quality Control
Author: Patrick Roche; Conservation Services Group
Publication Date: 2012
Presentation describing how Conservation Services Group uses data to monitor market transformation and for internal QA/QC purposes.

CURRENT SEARCH

Search found 13 items
quality assurance

Clear All Filters

FILTER BY CONTENT TYPE:
- Handbook (5)
- Publications (3)
- Program Materials (2)
- Topical Presentations (2)
- Webcast (1)

FILTER BY PROGRAM COMPONENT:
- Program Design & Customer Experience (5)
- Evaluation & Data Collection (3)
- Marketing & Outreach (1)
- Financing (1)
- Contractor Engagement & Workforce Development (6)

FILTER BY PROGRAM DESIGN PHASE:
- Overview (2)
- Strategy Development (5)
- Planning (3)
- Implementation (6)
- Evaluation (2)

FILTER BY STATE OR TERRITORY:

Use filters to further refine results

Example #4: Resources (2 of 4)

BBNP Search

Enter your keywords

quality assurance

Search

Search results

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

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

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

Program Design & Customer Experience – Identify Partners
Establish relationships with organizations that can help deliver your program by enhancing your knowledge, resources, capabilities and access to customers and contractors.

CURRENT SEARCH

Search found 4 items

quality assurance

(-) Handbook

Clear All Filters

FILTER BY CONTENT TYPE:

(-) Handbook

FILTER BY PROGRAM COMPONENT:

Program Design & Customer Experience (1)
Evaluation & Data Collection (1)
Contractor Engagement & Workforce Development (2)

FILTER BY PROGRAM DESIGN PHASE:

Overview (2)
Strategy Development (2)

Example #4: Resources (3 of 4)

BBNP Search

Enter your keywords
quality assurance

Search

Search results

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

CURRENT SEARCH

Search found 1 item
quality assurance
(-) Webcast

Clear All Filters

FILTER BY CONTENT TYPE:
(-) Webcast

FILTER BY PROGRAM COMPONENT:
Program Design & Customer Experience (1)

Better Buildings
U.S. DEPARTMENT OF ENERGY

Example #4: Resources (4 of 4)

Enter your keywords

quality assurance

Search

Search results

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

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

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

Search found 3 items

quality assurance

(-) Publications

Clear All Filters

FILTER BY CONTENT TYPE:

(-) Publications

FILTER BY PROGRAM COMPONENT:

Program Design & Customer Experience (1)
Contractor Engagement & Workforce Development (2)

FILTER BY PROGRAM DESIGN PHASE:

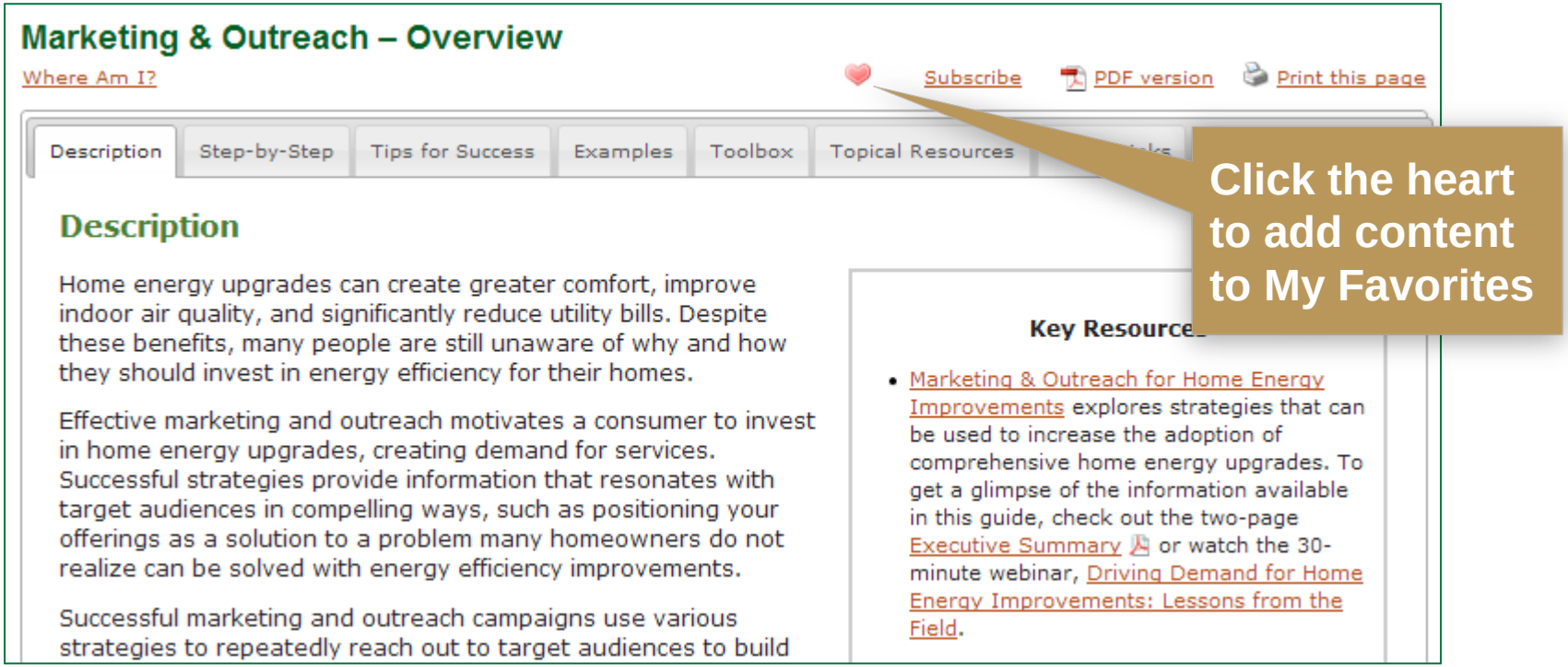
Strategy Development (1)
Planning (1)
Implementation (2)

FILTER BY STATE OR TERRITORY:

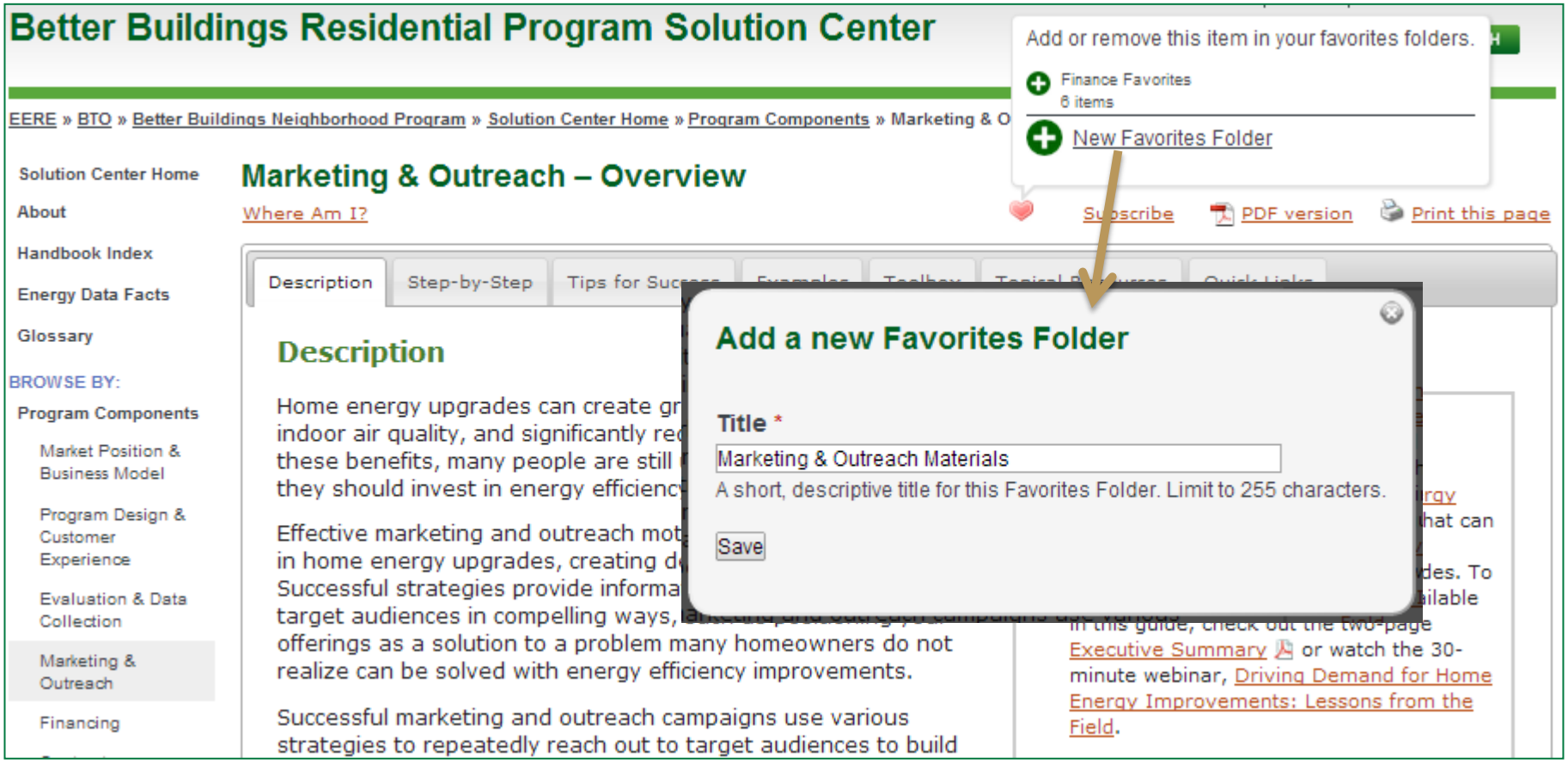
California (1)

Example #5 (1 of 4)

I've found a lot of useful ideas and examples about marketing and outreach across the Solution Center. How do I save the materials so I can refer to them later?



Example #5: Add Handbook to My Favorites (2 of 4)



Example #5: Add Resources to My Favorites (3 of 4)

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

Toolbox

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

Add or remove this item in your favorites folders.

Finance Favorites
6 items

Marketing & Outreach Materials
1 items

New Favorites Folder

Templates & Forms

Example of a Survey for Participants Who Completed Energy Upgrades **(144 KB)**
Author: U.S. Department of Energy
Publication Date: 2011
Sample email survey template for successful program participants.

Example Phone Survey for Screened-out Applicants **(211 KB)**
Author: U.S. Department of Energy
Publication Date: 2011
Sample phone survey for applicants who have been screened out from participating in the program.

How to Write a Press Release **(154 KB)**
Author: U.S. Department of Energy
This instructional template offers instructions on how to write a press release.

Example #5: Manage My Favorites (4 of 4)

My Favorites | Account | Log Out

Better Buildings Residential Program Solution Center

SEARCH

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

- Solution Center Home
- About
- Handbook Index
- Energy Data Facts
- Glossary

BROWSE BY:

- Program Components
- Program Design Phases
- Content Types

Marketing & Outreach Materials

Resources

Templates & Forms

How to Write a Press Release (154 KB) 04/25/2014
Author: U.S. Department of Energy

Remove this item from your Marketing & Outreach Materials Favorites Folder

Example Phone Survey for Screened-out Applicants (211 KB) 04/25/2014
Author: U.S. Department of Energy
Publication Date: 2011
Sample phone survey for applicants who have been screened out from participating in the program.

Example of a Survey for Participants Who Completed Energy Upgrades (144 KB) 04/25/2014
Author: U.S. Department of Energy
Publication Date: 2011
Sample email survey template for successful program participants.

Handbooks

Marketing & Outreach

Overview 04/25/2014
Spur consumer demand for your program's services by understanding your target audience and motivating them to act using effective messaging, marketing and outreach tactics, and attractive program offers.

MY FAVORITES

Finance Favorites
6 items
Marketing & Outreach Materials
4 items
New Favorites Folder

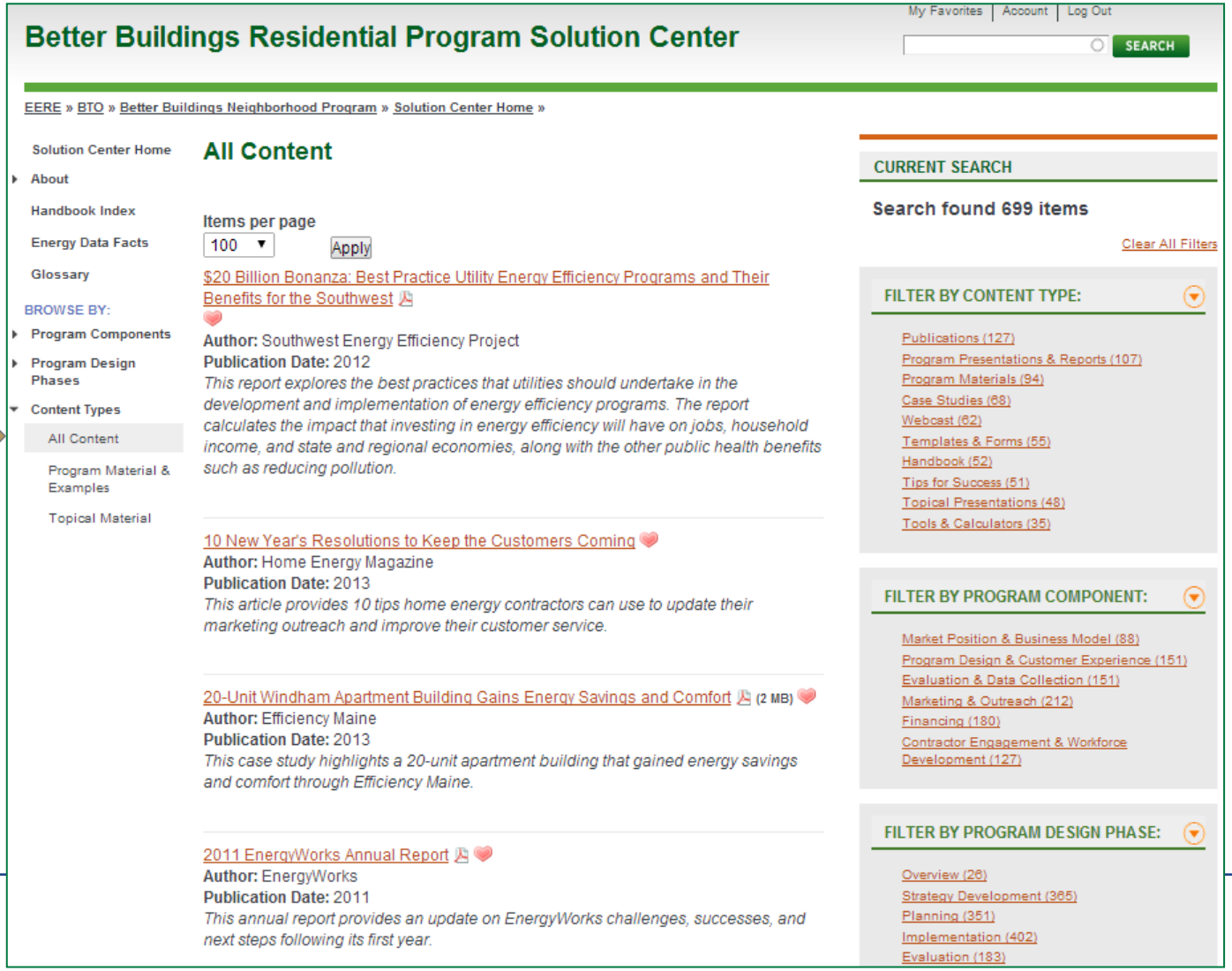
Hover over name to remove items

All of your "My Favorites" folders are shown here

Contents of "Marketing & Outreach Materials" folder is shown here

Example #6 (1 of 3)

What are other programs doing to engage and train contractors?



Example #6: Search for Tips for Success (2 of 3)

All Content

Items per page
100 ▼ Apply

Contractors are your sales team – educate and empower them with the skills to market your program

Design a program that provides value for contractors and aligns with their business cycles

Ensure that training programs focus on the skills that employers want and the community needs

Establish a clear system and process for ensuring quality work

Establish collaborative partnerships with contractors and communicate with them early and often

Have clear rules and systems for identifying and remedying contractor problems

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

Provide information to help customers pick the right contractor

Recognize and reward good contractor performance

CURRENT SEARCH

Search found 9 items

(-) Tips for Success

(-) Contractor Engagement & Workforce Development

Clear All Filters

FILTER BY CONTENT TYPE:

(-) Tips for Success

FILTER BY PROGRAM COMPONENT:

(-) Contractor Engagement & Workforce Development

FILTER BY PROGRAM DESIGN PHASE:

Overview (5)
Strategy Development (9)
Planning (5)
Implementation (8)
Evaluation (6)

Example #6: Tips Provide Program Examples (3 of 3)

Contractors are your sales team – educate and empower them with the skills to market your program

Contractors are your sales team – educate and empower them with the skills to market your program
Many home performance programs have confronted the challenge of how to reach out to more customers and to improve conversion rates of customer interest into completed upgrades. Realizing that the contractor is a primary face-to-face link between customers and the program, some Better Buildings Neighborhood Program partners took steps to empower contractors to market program services through co-marketing and sales training.

Programs have found that offering sales training to home performance professionals can significantly boost sales and improve customer experience and conversion rates. In addition to offering sales training, another approach is to empower contractors by co-marketing and co-branding with them to reach new homeowners. During sales training, technicians can learn about the program's upgrade process, how to sell it using non-technical communications with customers, and other techniques for transforming assessments into upgrades. Consider offering free or reduced-cost sales training as a partnership benefit for contractors. Taking the resources to offer this training to contractor staff helps ensure that technicians understand and can promote program benefits, rebates, and other incentives available to customers.

- Efficiency Maine boosted conversion rates with sales training, which helped contractors communicate with customers more effectively. Through monthly webinars and professional development courses, the program has helped contractors improve their skills in targeted communication and selling program options, thereby increasing home energy upgrade conversions. After conducting a two-day sales training course for contractors, coinciding with additional homeowner incentives and a filing deadline, Efficiency Maine's average monthly rate of energy upgrade conversions increased from 10% before the training to 60% a few months afterward.
- Energy Upgrade California in Los Angeles County provides marketing materials and sales training to contractors. Having learned that contractors often do not have the time or experience to create marketing tools, the program developed an online resource center with customizable marketing kits for contractors. Frequent networking events for contractors also provided training on specific aspects of marketing. Because contractors had limited budgets, Energy Upgrade California established an online, on-demand print center that contractors can use to print and deliver program marketing materials. The marketing materials raised the visibility of home performance professionals, helped homeowners find qualified contractors, and ensured a consistent message about the program.

Better Buildings Residential Program Solution Center

Next Steps

U.S. DEPARTMENT OF ENERGY

Summer 2014: Peer Review & Beta Use

- Peer reviewers will comment on technical validity, market relevance, and framing
- Beta User access:
  - https://bbnp.pnnl.gov/
  - Username: betauser
  - Password: bbrpsc
- Create a user account to customize experience
- Get involved!
  - Sign up to become a beta user now or email: BBRPSolutionCenter@erg.com

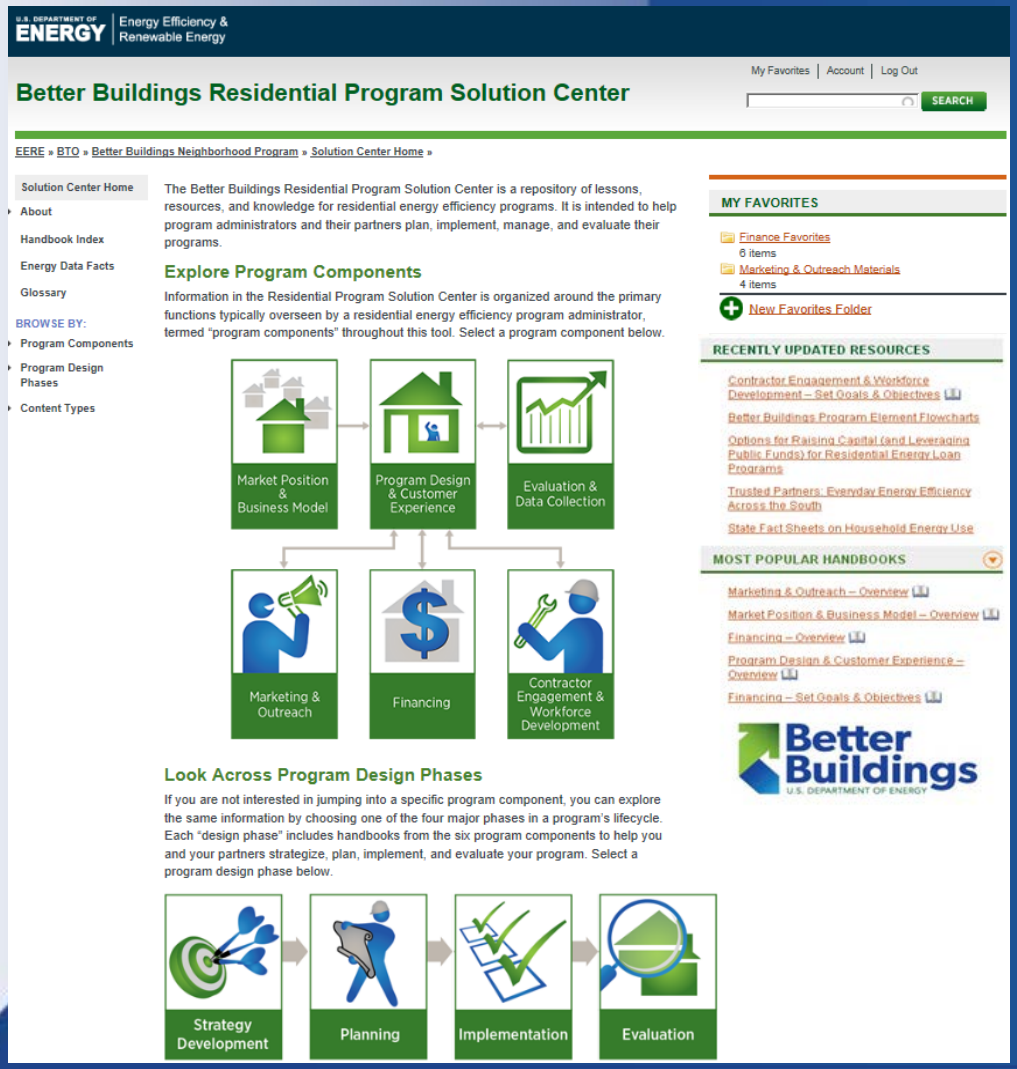
Future Enhancements

- Comments & ratings for content
- User submission process for new content
- Highlighted content based on your market and program – “Decision Tool”
- More multimedia
- What else?

Questions?

- How would you use the tool?
- What do you find helpful about the tool?
- What do you find confusing about the navigation or other features?
- What types of content should we add?
- What additional features would you like to see?

Access the Solution Center



Login information:

- https://bbnp.pnnl.gov/
- Username: betauser
- Password: bbrpsc

- Email comments about the Solution Center to:

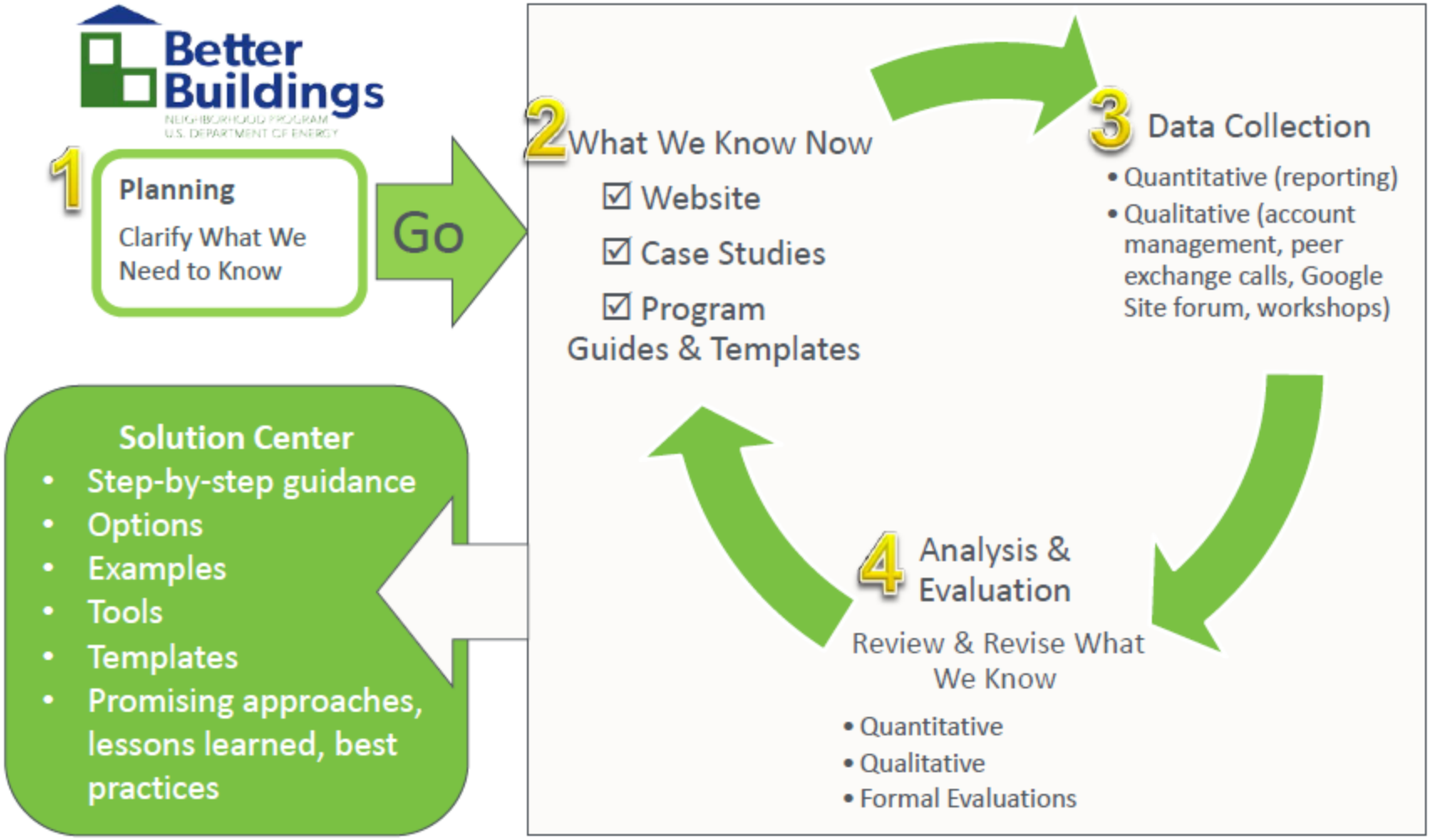
BBRPSolutionCenter@erg.com

U.S. DEPARTMENT OF ENERGY

Appendix

U.S. DEPARTMENT OF ENERGY

Content: Starting with Better Buildings Neighborhood Program



Six Program Components

- **Market Position & Business Model:** Identifying unmet needs in the marketplace that can be filled through a well-designed organizational business model that balances costs and revenues.

- **Program Design & Customer Experience**: Designing and implementing an integrated residential energy upgrade program that provides a positive experience to customers.

- **Evaluation & Data Collection**: Devising and implementing plans for continuously and periodically evaluating program efforts to identify successes and areas of weakness that require attention.

Program Components (cont.)

- **Marketing & Outreach**: Inspiring homeowners to action through effective marketing and other strategies for driving consumer demand for home energy upgrades.

- **Financing**: Ensuring that consumers have access to affordable financing that will enable them to pay for energy upgrade activities.

- **Contractor Engagement & Workforce Development**: Recruiting, training, and working in partnership with the energy efficiency contractors who will complete energy upgrade work in customers' homes.

Development Timeline

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

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

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

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

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

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

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

Manage Your Subscriptions: Handbooks & Resources

View | Edit | Subscriptions

Handbooks & Resources | Content types

Click "Subscriptions" tab on the Account page

Frequency of Notifications

Weekly

Select when to receive emails:
*As soon as possible
*Daily
*Weekly

Select Handbooks

- [ ] Subscribe to All
- [ ] 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
- [ ] -- Develop Resources
- [ ] -- Deliver Program
- [ ] -- Assess & Improve Processes
- [ ] -- Communicate Impacts
- [ ] Contractor Engagement & Workforce Development

Select individual handbooks or entire program components

Select Resources by Program Component

- [ ] Subscribe to All
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Select resources by program component

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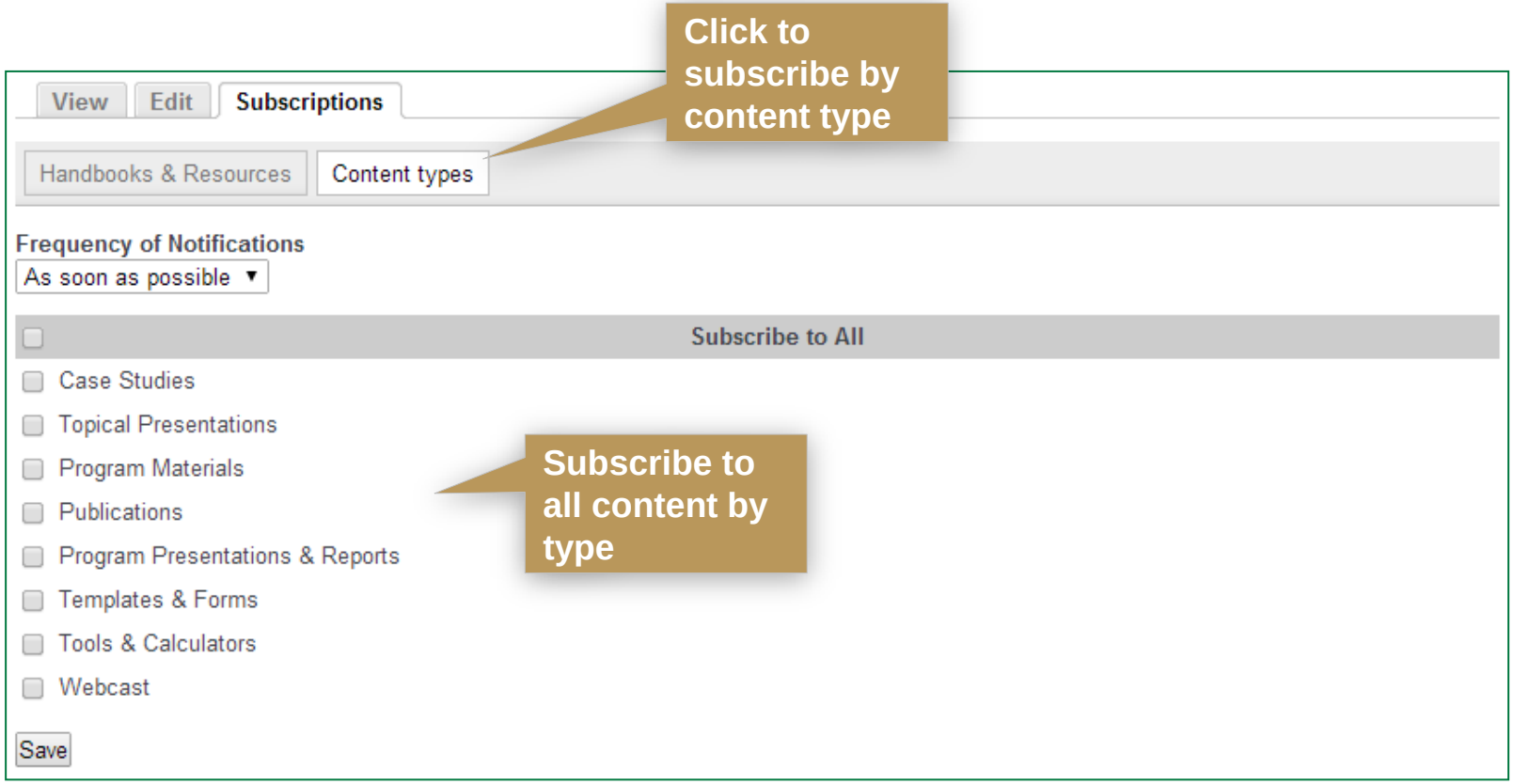

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Heavy Membranes at Valley and Roof Deck Penetrations

Feedback

Belongs to 0 Field Kits | Print this page | PDF version

This measure may not be appropriate for your climate. See the climate tab for more information.

Scope | Description | Ensuring Success | Climate | Training | CAD | Compliance | More Info.

Scope

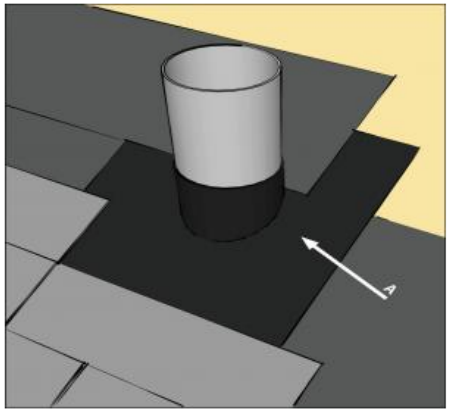
Water Managed Roof Assembly

Self-sealing bituminous membrane or equivalent at all valleys and roof deck penetrations.

A. Install a self-sealing bituminous membrane or equivalent at all valleys and roof deck penetrations prior to roofing felt.

ENERGY STAR Notes:

Not required in dry climates as shown in 2009 IECC Figure 301.1 and Table 301.1.



Content is specific to you based on information you provided

Peer Review

- Scheduled for summer 2014
- Comments/suggestions/recommendations will:
  - Examine technical validity and replicability
  - Evaluate market and strategic benefit
  - Enable us to reframe information
  - Help determine what to fix and how
  - Find information gaps
  - Determine additional resources
- Get involved!
  - Sign up to become a peer reviewer now or send an email to: BBRPSolutionCenter@erg.com

Contact Us

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Better Buildings Residential

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