

## Sustainable Energy Resources for Consumers Webinar on Community-Based Social Marketing for Weatherization Programs

The following is a transcript of a Webinar recording on community-based social marketing for weatherization programs, which was presented on Jan. 11, 2011, for [Sustainable Energy Resources for Consumers Grantees](#) and sponsored by the U.S. Department of Energy. [Watch the video recording.](#)

*Liz:*

Thanks very much. Hi, this is Liz Doris. I'm with the National Renewable Energy Lab providing technical assistance to a number of different programs, including the SERC program. And we're really excited to have you join us today for the SERC Technical Assistance Webinar. Today, we're gonna hear from Amy Hollander on community-based social marketing, but before we do that, I just wanted to thank DOE for making these possible. They've been really active.

**Tyler Huebner**, who is on the line today, also has some background in this and is gonna be available to answer questions at the end of the webinar. But Tyler and his team have been really active in making sure that you all get the assistance that you need and get the access to the expertise that you need. And we really appreciate that and the opportunity to bring you these webinars. Just so you know, the webinars are gonna be posted at [www1.EERE.energy.gov/WIP/SERC](http://www1.EERE.energy.gov/WIP/SERC). That's the SERC webpage that you've probably gone to a number of times.

And under "Technical Assistance" there you'll be able to find the webinar, the voice recording including the slides timed with that as well as it'll be closed captioned so that you don't even need headphones to listen to it. We'll probably have that up – we're aiming for about a week to ten days after the presentation, and the presentation itself will go up there in just a day or two. Obviously, if you have further questions on this webinar, you're more than welcome to email us at the technical assistance mailbox, which is [SERC\\_TA@NREL.gov](mailto:SERC_TA@NREL.gov).

And just to let you know, the next seminar – we do these every two weeks on Tuesdays at this time – same time, same place, and Tyler sends out an invite to everyone, so you'll get that the 25<sup>th</sup> of January. And that's gonna be **Otto Van Geet** from NREL talking about PV technology and cost options. That should be a really interesting one as well. For some logistics today, the sound is off for recording purposes, as **Lisa** mentioned, so that we can get a good, high-quality recording. But you will be able to – at the end of webinar, be able to press #1 and speak your question.

So if you have questions during the webinar, what you can do is to up in the corner of your screen. There are five drop-down menus, and the fourth one over is “Q&A,” and if you click on that and type your question, Amy’s gonna periodically check for those, and she can answer during the webinar. Also, she’ll probably take a look at the end of the webinar and answer questions then. So I think that’s it for logistics. Let’s get to today’s presentation on community-based social marketing. Amy Hollander is our presenter.

She’s a Senior Project Manager here at NREL and has been very active in providing technical assistance under this program. If you’ve had a technical assistance question that you’ve asked, you’ve probably talked to Amy at some point during the answering of that. Prior to working with NREL, she directed a local weatherization agency in Colorado for over 20 years. So she’s got a lot of background in this, and we’re really looking forward to her presentation. Thanks for being here, Amy. Take it away.

*Amy:*

Thank you very much, Liz. Good afternoon, everyone. Thank you so much for your attention today. I want to start by talking about community-based social marketing. It was a phrase that was coined by the environmental psychologist, Doug McKenzie-Mohr, who is from Canada. He continues to lecture around the world on this topic. He has done some fascinating research, and I think it’s a particularly interesting topic because so much has happened in the world today, and I think – regarding the environment, regarding buying green and sort of the whole green transformation that we’ve seen, and it’s so much due in part to some of the social community norms that have been established.

And that’s the large part of what Doug McKenzie-Mohr’s research is about. So the definition is just creating effective community programs to foster sustainable behavior. And in our case of these SERC grants, we’re talking about energy conservation behavior. I worked with Tyler on some of these slides to get accurate information on exactly what you all can do with your SERC grants. He also is pointing out that there are so many challenges to all of the grantees that are dealing with client education. It’s been very neglected in the weatherization programs throughout the United States.

It’s something that usually people don’t have time for, and yet it’s proven to really save lots of energy. We also know from Doug McKenzie-Mohr’s research that clients can greatly benefit from energy education. It’s also very difficult to measure success, which I know a lot of you are grappling with. And we also know

that it's difficult to break through when low-income populations are often facing more serious challenges. There is a flipside to this barrier, and we'll talk about that later. The SERC grant goals for community-based social marketing are – I'm gonna talk about those here.

We just wanted to remind you that you should be attempting to change clients' behavior to save energy. This activity is analogous to a new technology allowing – allowed in SERC for the first time. So we need to be saving energy in and of itself, not just marketing for weatherization and for other services. So some small examples of that are, you know, changing behavior such as turning off lights, adjusting and setting thermostats, saving hot water, and learning about the myths of CFLs, perhaps debunking some myths and also doing energy coaching.

SERC grant goals are – we have four of them listed here that they cannot be used for items funded by regular weatherization grants. SERC dollars can be used congruently on units receiving weatherization services. So you can still make those energy conservation measures, but you must use weatherization dollars for those and use the SERC for something normally unfunded by weatherization. SERC dollars can be used on units that received weatherization in the past as well, and SERC dollars can be combined with utility dollars or other sources, and I'll give some good examples of that coming up here.

So first, we're gonna talk about program design, and then towards the end I'm going to talk in more detail about a community-based marketing energy sweep that proved to be very successful. A quote from Doug McKenzie-Mohr is as follows, and I'm gonna let you read it yourself, but generally his research shows that information campaigns alone will rarely bring about behavior change. So we can't just sit down and talk to people, and worst of all would be handing them a flyer and saying, "Goodbye," or handing them a booklet full of energy-saving information saying, "Read this and try to save energy."

We really need to design a program that offers a lot more than that. We know that conventional methods to promote behavior change are often very ineffective. So there are four general styles of marketing that you're all familiar with, and these are listed in the order of effectiveness. We all know that the one-on-one conversation is the most powerful, especially when it comes from a friend or a community leader. Television is powerful, radio, and unfortunately the printed word or flyers, brochures and junk mail are the least effective marketing tool.

Community-based social marketing does expand on the person-to-person social interaction, which you'll hear a lot about. In program design, we're gonna go over these eight items. They're basically identifying barriers and finding solutions to those barriers, getting our intentions to produce actions, using prompts and building social norms, marketing your message even if it's a person-to-person message – there's a way to do that – providing incentives – and we are gonna include here specific incentives that are allowable with SERC grants – removing external barriers, and, of course, doing some kind of evaluation when you finish your program.

So I'm covering barriers and benefits. There are a number of things that you wanna do before you plan your program, and I know some of you are already down the road in planning, and so just take a look at these next couple of slides and decide if you've covered some of these areas. You definitely need to figure out what your barriers are, and the first step in that is indentifying your mandate and targeting what behaviors you want to change. And then go ahead and do research and read articles and reports on what's been done in those areas in the past.

The second way to uncover barriers is to do qualitative research – an observational study – like an example of that might be if you were going to observe somebody recycling and see how they respond to the different containers. So doing observational studies are very powerful. And the best example I can think of in the weatherization world is to maybe have your energy auditors observe clients' ability to change behavior and then really use your energy auditors in your program design. Focus groups are another way to do qualitative research.

Focus groups are a little expensive, although you can spend your SERC dollars on these. They're very interesting. You wanna use six to eight individuals, and you want to pay them so that they do not feel burdened by the information they're going to provide for you. You want to define the focus group to have clearly defined questions. You want to randomly choose community members as much as possible. Some examples of focus groups that might be applicable to your SERC grants are to conduct a group of low-income eligible residents to discover their current attitudes towards energy conservation or conduct a focus group on how low-income residents may respond to energy counseling.

The final way to uncover your barriers and discover what might benefit your clients is to do a survey. It's usually very inexpensive. Often it only produces results – I think the going rate

is five percent. Now, Doug McKenzie-Mohr, he quotes that you can get a 20 percent response rate, and I found that surprising, but I know he's done a lot of surveys. And perhaps in the sustainability field he is getting a higher rate, perhaps because he's not selling anything. Phone surveys provide a more random sample, and an example of a survey may be surveying low-income clients to measure what they already do to save energy.

So you could get phone numbers of qualified clients and find out what their level of ability is just by what they're already doing based on trying to save money. So this slide talks about building commitment in your program design. And this always has been proven to be so effective, and I've had a lot of experience with this, and the results have always been tremendous. Whenever you ask someone to sign something, it usually binds a very strong commitment. People have an innate desire to be seen as consistent, and when they sign something they usually wanna hold true to that signature.

But you do wanna keep your pledge simple, and you most definitely don't want it to be authoritarian or full of guilt. Guilt is something that does not work in these types of programs. Some examples of a written pledge are to possibly – try to use the clothesline every four loads of laundry, or have them pledge to lower their thermostat whenever they leave the house, or perhaps even a pledge to turn off their plasma television when they're not watching it. Those are some examples.

And the block leaders are extremely effective, and one example is a lot of recycling programs try to identify block leaders, and then they ask these block leaders to go door-to-door and offer information on recycling. And it's so effective to have a member in your community. I know in my own weatherization program, we had a woman who lived in a mobile home park, and she was the community matriarch. She was very good at helping everyone, and she knew everybody, and as soon as she got weatherization everybody wanted it.

And she kept applications, and she helped them fill them out, and she was very, very essential to getting her entire mobile home park weatherized. An example of using that within the SERC grant is to identify perhaps a community IT expert who can help others with learning how to use the Google Power Meters. I know some of those power meters through the computer have been proposed in some of the SERC grants. So another part of your program you're gonna wanna include is going to be prompts.

And one thing that I've had first-hand experience with is we targeted a neighborhood for a neighborhood energy sweep, and we mailed out letters telling them that we were gonna be arriving, and through many pilot projects we had perfected this approach. And we learned right away that people did not remember getting a letter, but when we put up yard signs with permission – because you do need to have permission from the resident to put a yard sign in their yard – when we did that people almost always said, “Yes, I saw the signs that you were coming.”

And this might help if you're targeting a multifamily unit that's qualified. Stickers on light switches are still popular because there is a myth that fluorescent lights wear out if you turn them on and off, and that is a myth. And so it doesn't hurt to continue with that type of prompt. Notes of praise for achieved energy savings and reminders after retrofits are performed is another idea of getting people to – giving them that positive feedback in the form of a prompt. So building social norms is one of the most interesting parts of community-based social marketing.

And this inner-community modeling is something that could be really valuable if you can find the right people in your low-income areas to do this. An example is the 1930s farmers in the United States. I know the picture I've got here makes it look more like I'm in Peru, but really the farmers of the 1930s during the Dust Bowl – they all received brochures to encourage topsoil mitigation, but they completely failed. And so what was successful was when they trained a few farmers in a community and asked them to go and work with other farmers and teach them – at least convey a little bit of information on how they should do something.

And that program was extremely successful, and that's a perfect example of how community-based social marketing is so effective. Also, with social norms you can establish community norms. Some examples of community norms are something like – now I know that in your SERC grants it's not technically approved to use clotheslines, but the fact that someone would give out a clothesline to save energy, it sort of establishes a community norm that that's acceptable.

Also, giving out buttons that say, “I conserve energy,” or “We compost,” it sort of just sets the stage for people realizing that it's not strange, and it's something that everybody's doing. The other thing I like about community norms is it really gives the low-income residents a way to contribute to the greater good because this is something that's very rewarding. When you're often having trouble in your life, and you don't have money, maybe you have

other social problems, people feel very good about being able to contribute.

And oftentimes, when I'm working with seniors, I'll suggest that if they don't wanna take a handout they should do it for the sake of saving energy. I'm gonna check on the questions. It looks like I don't have any questions yet. So now we're gonna talk about marketing your message. The major influence on our attitudes and behaviors is not the media, but rather our contact with other people, and this is a core result of what Doug McKenzie-Mohr found in his research.

So when you're learning to market your person-to-person message or whatever kind of message you have, make sure you know your audience. Use nonpolitical language. Don't talk about reducing greenhouse gasses. Instead, talk about improving air quality, helping asthma sufferers or reducing pollution. Make your message easy to remember, make it specific, and when you give examples of saving energy it really helps to use examples that they can relate to.

In other words, having someone relate to the amount of CO<sub>2</sub> saved might not have as good of an impact as telling them that one incandescent bulb will consume 82 pounds over its lifespan, and that's 100 times more than a CFL. So here are some examples of some other – I mean, just telling them that a CFL will save 75 percent on their lighting bill is usually something they can relate to, and it's something that your people can also remember to tell them. So here are some more tips on developing your message. You want to listen to the clients' interest, and this is something that I really picked up in a seminar – an all-day workshop that I went to on sustainability and community-based social marketing.

They talked about really finding out what the client wants to know about and then tailoring your conversation with them based on that. One way we did this was we carried an accordion file with lots of different types of information, so instead of inundating them with paper, if they really wanted more information we could pull out a one-page flyer and offer them exactly what they needed instead of giving them a lot of confusing and unnecessary information.

Other ways you can get them interested is to thank them for contributing to the nation's efforts to reduce energy consumption, especially if they don't really care about the environment. That's always a good one. Always stay positive and avoid fear-rousing messages. That's very important when you're constructing your

message. So incentives are definitely allowable for SERC grantees. And Tyler gave me some really good examples of what can be paid for with SERC grants. So you can do – you can offer prizes for high energy savings.

And if you're gonna do a competition amongst neighbors I encourage you to keep it friendly and light, and don't make the stakes too high. I think a raffle or a lottery is a good way to make awards; then nobody's too disappointed if they feel their neighbor cheated to win or something. Public recognition is a great way – if you tell the neighborhood or the weatherization clients that they can get their name printed for saving the most energy or saving a lot of energy. You can fund fiestas or block parties to try to get people involved in community energy savings, which has proved to be tremendously successful.

McKenzie-Mohr did a really interesting thing where they simply gave out energy reports showing people how much energy they used and how much they saved, and for some reason by using the smiley face it made a huge difference in their results. They either used smiley faces or frowny faces, and I suppose this goes back to our elementary school days, but it's for some reason very effective. And we advise not giving away a lot of junk giveaways like pens and key-chains and magnets. I think chap-stick is a more useful item, but oftentimes a lot of these things end up in the landfill. Just remember the goal is to create incentives and to remove disincentives.

So I'm gonna talk a little bit more about removing external barriers. And here are just some examples. So if you identify what the barriers cost – I think it's extremely successful, and it's becoming more common as well to give away free things. I think it's being done a lot more on television, and it's being done a lot more in communities and especially with rebates. And an example of that is, you know, a utility might spend millions of dollars marketing trying to get people to save energy for their demand-side management program, and instead they could have used the millions to provide retrofits, and the good word would travel without much effort on their own.

If you have a barrier of inconvenience, be sure and allow your audits to be scheduled on Saturdays to accommodate a low-income person's work and school schedule. And if something's unpleasant, such as having your house torn apart, be sure and train the crews to leave the homes cleaner than when they arrived. So the four basics of designing your program are listed here. And if you follow these four items I can almost guarantee you'll have a



successful program. When you do design, again, you wanna identify the barriers and the benefits and use tools to do so. And the power of a pilot project is enormous.

The community-based social marketing that I did included a lot of pilot projects, and we finally got it down to something that produced \$20,000.00 in energy savings in one Saturday, and that was an annual savings amount for the 300-and-so houses that we went **through**. But we started out doing things very differently than the way we ended up doing things. So when you go to implementation, be sure and design your programs so that you can change it based on your pilot. In other words, don't go buying thousands and thousands of items when you're not even sure they're gonna work without testing them on a market or testing them on a few clients first.

So be sure and design your program to be flexible. And at the very minimum, please have your customers fill out a feedback form. This could be in terms of just a short survey, a postcard. It's always good to ask them to send something back after you've left, so they don't feel inhibited. This slide just lists some of the resources that are available to you. The nice thing about the Doug McKenzie-Mohr website is it's completely free. You can sign up to be a member, and they will email you things based on topics that you've said you're interested in.

They also offer a workbook. I believe you have to buy that, but I've heard it's a very effective workbook. And you can also purchase books off of his site. Unfortunately, his latest book is about ten years old, and I know he's very soon going to be releasing a new version, but I don't know when it's going to be available. So I'm going to check and see if there are any questions. And it looks like there aren't. So I'm gonna go ahead and talk about this example I keep referring to. So this is an example – and I talked to Tyler about this example and how it could be tailored to SERC grantees.

I know that there are two or three of you that have utility dollars, and perhaps some of you have access to other community dollars as well. So you could conduct a neighborhood energy sweep. What you could do is use weatherization funds for energy conservation measures, which we're calling ECM. You can use utility dollars for low-income that are not eligible for weatherization and pay for ECMs out of utility dollars. And you can use the SERC dollars to do the energy education to expand into areas that normally – that weatherization can't cover.

And if you combine these three funding sources, you could potentially design a program where you could go door-to-door in a low-income neighborhood or a multifamily unit. You can use the weatherization funds to try to get people signed up for weatherization, but at the same time you can go in and install measures and either charge them to weatherization, to your utility or your other funding source or – and then you can do the education with the SERC funding. So this particular example offers one-on-one engagement.

It really engages the residents, and the focus is to identify their human interests, not what yours are. You want to offer resources that work such as DVDs and a small amount of paper. You want to go ahead and install energy conservation retrofits – whatever you can think of that's allowable. And I'll give you some examples of that. And you want to suggest behavior changes in a very non-authoritarian style. So this is what we did. The other successful thing about this particular program is we used high school students or college students and we paired them up with a senior volunteer.

It was actually a program where seniors were working off their property tax, which is pretty common in different organizations – different governmental organizations. Then we put them together in a low-income neighborhood. We trained them at previous sessions on the concepts and on what we were gonna do. And together the energetic concepts coming from the students combined with the trusted wisdom of the seniors created a great situation where the doors just flew open and we got a 50 percent entry rate. This was done on a Saturday morning, and here's a photograph of one of the energy sweeps we did.

You can see we've got seniors and students there. These are the totes that they carted around full of CFLs and different items. It worked fabulously well. We did require the use of a park or a parking lot or a church or a school, and we did not have children come to this. That's a picture of my son who I had to bring along that day, but children were not involved, just so you know. The reason I put this slide in here is because you've got a team here, and – by the way, these folks had a lot of fun. I can't tell you how easy it was to get volunteers because word-of-mouth spread and people were very excited to volunteer for this project in the future.

But the reason I like this photo is because you can see him carrying trash bags, and he's got a step-stool there, and it's – we bought these dollies for \$20.00 - \$25.00 as well as some other ways we experimented with carrying items around. But this is a prompt,

and I call it a “live prompt” because when we went in to install CFLs, we would throw away their incandescent lightbulbs. Now, obviously if they were attached to them and they really didn’t wanna throw them away because they didn’t know if their CFL would please them or not, of course, we let them keep some or – it was up to them.

But we really encouraged them to just throw them away, and we took them with us so that they could really understand that in this case it paid to install these things right away and not wait until the incandescent wore out. Something else we did is we worked with the local water utility or the city water utilities, and they often gave us free items to install in the houses. And the students were great at doing installation. It didn’t require any extra insurance for our agency, and it worked out tremendously. They installed low-flow showerheads. They installed CFLs in difficult-to-reach lighting and it seemed to be very effective.

We did pay some bilingual advocates because obviously when you’re going to a neighborhood where 70 percent of the population speaks Spanish, you want to have someone who can talk to them, and these folks had a lot of fun, as you can see. So the power of the one-on-one interview is tremendous. Seniors especially were receptive to this. They enjoyed learning about energy conservation, about all the new things that were happening out there. And this particular senior was a retired social worker, and she really enjoyed getting back into the homes of some people that were a lot like her old clients, and it was a really fun experience. So these are the results of the energy sweep.

As you can see, it was tremendous. The neighborhood – the volunteers – we used about 40 volunteers including organizers, and we swept through 327 homes. 55 percent allowed us to come in, and you can see the energy savings, the greenhouse gas emission reduction, and the fact that in one Saturday over a six-hour period we saved almost \$20,000.00, and that’s an annual figure. So you can see how this type of marketing was really effective.

So that’s the end of the presentation. We still have 20 minutes, and I want to offer to anybody who wants to converse with other SERC grantees who would like to do a conference call to share your ideas of what you’re doing, I’d like to offer you to go ahead and type your email and your name in the Q&A, or you can email me. But if you somehow give us your name and contact information we can get a hold of you, and we will set up a conference call so we can all talk about your programs and share information on what’s working and what’s not and answer

questions as well. So I'm gonna ask Lisa to come on the phone. She's our operator, and she's gonna turn on the Q&A.

*Operator:* Thank you. At this time if you'd like to ask a question, please press \*1 on your touchtone phone. Please unmute your phone and record your name clearly when prompted. Your name is needed to introduce your question. To withdraw your request, press \*2. Once again, that's \*1 for questions.

*Liz:* So this is Liz. I have a question. Can you clarify what the – or can you I guess go through again what the different roles of the different funding pieces would be. Like when you said chap-stick – would that be something that this SERC grant money could purchase or no?

*Amy:* I believe it can. I think chap-stick with the name of your agency on it in case they want to contact you is considered a marketing material. The reason I brought up chap-stick was because at least it's something that probably is more usable than another key-chain. And of course, that's completely up to the SERC grantee. Tyler, are you on the line?

*Tyler:* Yeah.

*Amy:* So I –

*Tyler:* Yeah, that would be – I mean, the folks that are going through and doing this – I mean, everyone's gonna have a little bit different design, and all these types of sort of individual questions are really gonna be answered case-by-case with the grantee and what they're proposing to do with their rollout of community-based social marketing and the project officer and myself involved in making sure that it's following all the rules and policies of SERC. So it's – if it's chap-stick related, it's gonna have to be a pretty convincing case of how that eventually is gonna save energy.

As Amy pointed out, the key distinction as everyone knows with SERC is twofold: activities, one, that are benefiting clients and saving energy and, two, activities that cannot be done in WAP. So it's an energy-saving activity that we can't do in WAP, and the proposals that came in are promising but spare on the details, and that was what was expected. So we look forward to working through details like that with you guys on how you're proposing to roll this out.

*Amy:* Yeah, I did get a question – or somebody had a request if they could get a copy of the energy sweep budget, and it turns out I do have some great material to share that includes the cost of doing

the sweep. So I'll be happy to send that to you if you wanna send me your email. You can do it right now in the question box, or you can email me at the address which is on the screen.

*Operator:* At this time there are no questions from the phones.

*Amy:* So I have a question here – a written question. This person would like to – let's see – the question is, "What amount or limits of our awards could be used for consumer education? Granted activities are different for each of a subgrantee's subrecipients." So I don't think we have in mind a percentage to be used for consumer education, but I know that some SERC grants are based on trying several methods to get people to save energy through energy education. Do you wanna add anything to that, Tyler?

*Tyler:* No, it's gonna be – you're right on, and it's gonna be just related to the budgets that have been approved through grantees, whether it's administrative or program operations or whatever. But you're right on, Amy. Some grantees have approved projects specifically to drive these community-based social marketing or behavioral change approaches, and that's I think like nine or something like that of the local agencies.

*Amy:* I have a feeling the question may be related to – you know, say if they don't have community-based social marketing activities, can they still use some amount to get the attention of the changes they're trying to make? And I would think that's allowable, but do you have any ideas for people who don't have the activities earmarked?

*Tyler:* Yeah – we don't have a percentage outlined at this point – a percentage maximum. But it is allowable, obviously, to do client education, and we expect that you will undertake client education whether it's this kind of activity or if it's a new technology to explain those technologies to the homeowners or to the clients that get SERC projects done in their units.

*Operator:* Excuse me. We do have a question from the phones.

*Liz:* Go ahead.

*Operator:* Okay – our question comes from Pete. Thank you. Your line is open.

*Question:* Hi. Yeah, I was wondering if you could tell me the difference between the pilot that you did and the sweep, and what you might have learned from the pilot that changed the way you did the sweep?

*Amy:* Yeah, that's a great question, Pete. The first pilot we did, we just handed out boxes of CFLs and a few other items because we weren't sure that we wanted people going into the homes. So what we realized is that people would take the box of lightbulbs, and they'd put it on their shelves because they didn't wanna be wasteful and throw away a perfectly good incandescent bulb. So then we kind of scratched our heads and said, "Well, we need to do something more assertive," and as soon as we got approval we were going into the homes and installing up to 10, 20, sometimes 25 lightbulbs per house.

We decided that installation was the best way to actually make these retrofits occur. A lot of times we noticed, too, when we gave the incandescent back to the clients after we installed CFLs, we would notice that they didn't wanna throw them away; they wanted to keep them. So that's another change we made; we decided it was best to ask them if we could take them away. And unfortunately, we couldn't tell them that we were gonna recycle them because we couldn't find anywhere that would recycle them unless we – I think there was a drop of lead in each bulb they would – we could find recycling for.

But the main thing is we – let's see – when I left we had done ten of these, and we learned a lot from each one. And the things we learned in the final development was to make sure we did direct install, to have a bilingual person available. We also had weatherization crews on-hand because we found a few times we walked into homes that were having no heat, and so we got them signed up with weatherization and even fixed their heat, which was really powerful because when you walk into a home and somebody's freezing, and they're sick, and they don't know what to do, it's pretty powerful to be able to help them.

We also used the weatherization crews to help us if we had a problem. And the whole time doing this we only had one light fixture break, so we had somebody run to the hardware store and buy a new light fixture and install it, and everyone was happy. So those are some examples of the differences moving from pilot to implementation. Does that answer your question?

*Question:* Thank you. Yeah.

*Liz:* How large was the pilot?

*Amy:* The pilot – well, it's funny because we started out a lot larger. We used to sweep 500 to 600 houses, and we'd have about 20 different teams – or no, excuse me, we'd have about 30 different teams.

And then we decided it was more manageable to do smaller sweeps. Another change that we never made that we thought about was trying to train the volunteers right before the sweep. Training is often an issue because you have to ask somebody to show up for a session a week or so before. And then you ask them to read all this material, and – it's kind of – I think you lose a lot, and I think it would be more effective if we had the people sign up for training.

We'd give a training session of about an hour to an hour and a half and then send them out to do the sweep. And I know that's how the city of Denver did it, so that's an equally successful way to do it. I think our barrier with doing the training ahead of time right before the sweep was that we couldn't find a staging area that provided everything we needed plus a classroom atmosphere. These neighborhoods were selected based on census data of low-income as well as looking at **LEAP** lists – you know, looking at folks who are receiving utility subsidies. That helps us identify neighborhoods and multifamily units as well.

*Liz:*

So just as a reminder, these presentation slides are gonna be available in PDF on the SERC website – the EERE SERC website as well as the NREL website. And then in about – hopefully in about ten days we'll have the recording of today's session as well as closed captioning on that so that you can listen to it or read through it on that website as well. We also have the older presentations up on that site, and we'll have future presentations as well. Are there any other questions?

*Amy:*

Yeah, this is a good question. “Will there be tracking devices or monitoring equipment to track energy savings or information available as to where to acquire this kind of equipment?” And Tyler, I know you're planning another webinar. Do you wanna talk about that?

*Tyler:*

Yeah, two things – one, I just sent out an invite earlier today for an evaluation webinar, which will get into this type of thing a little bit. But secondly, it's definitely allowable for you guys to invest in some equipment that can track energy usage to try to prove the energy savings associated with these types of behavior-based energy reduction programs. The specifics, again, I'll defer and say will be probably case-by-case to be approved by your grantee and/or DOE project officer. But this is exactly what we're looking for, is proof that these types of things work, and to do that you're gonna have to do some data and some crunching and some evaluation as Amy pointed out in the last step of the program design.

*Amy:*

So I have another question. Someone's wondering about the overhead cost of the sweeps. I believe the \$10,000.00 does not include program planning and all the training, but I'm not sure. I'll have to go back and look at those. It's been a while. The other question is, "How do we create jobs from this type of thing if it's based upon volunteers?" And again, I just wanna emphasize that doing a sweep like this probably takes a special situation, but anything – any information, you know, you can get from this to inspire your own program is brilliant, I'm sure.

And in terms of how to create jobs, I think what was really fun to see with the energy sweeps was the students definitely became interested in doing more of this. We ended up spawning an energy auditing program after this that was funded by the utility. Some of those students became energy auditors. Some of them were studying environmental science and other degrees that were pertaining to the situation. So I can't say that an energy sweep would employ a lot of people.

However, it would employ a program manager who would be somebody – I mean, it is a full-time job to organize these depending on how many you're doing and how much money you have. The seniors especially loved it. I think they consider their property tax write-off programs to be more of a volunteer situation where they get opportunities to get into a community and work again. So it's – in that sense, it's a great community event. But no, it does not provide 40 jobs. However, it did give people income.

And I think – Tyler, you can answer this, but I think it would be allowable to pay people to go door-to-door. You could pay them \$8.00 or \$10.00 an hour for a Saturday. I don't know if it's worth getting them signed up for employment, but I think that's probably an option. Is that the case, Tyler?

*Tyler:*

This is an area that I know nothing about, but if someone had that specific question we could get the answer for you. You could either email Amy or myself – respond back to the calendar invite. So please do that.

*Amy:*

Yeah – and if you've gotten some ideas from this webinar today please feel free to ask Tyler or myself if something's allowable. I think we're really interested to hear what kind of programs you all are developing. I've got a couple of requests to look at the budgets for the sweeps, and I'll be sure and send those. And hopefully some of you are interested in having a conference call. Perhaps we need to wait until you get into the program planning, but the idea



of a conference call is to go over programs that are similar with a small group – maybe a group of about ten – and discuss different strategies and different allowable expenditures. So be sure and email me if you're interested in that.

*Liz:*

I think we're gonna go ahead and wrap up. Again, this is Liz with NREL. Please feel free to send us any follow-up questions either directly to Amy and Tyler or through the SERC\_TA mailbox here at NREL. We'll try to get back to those as quickly as we can. We really appreciate your time on these calls and your attention. And please do also let us know if there are topics that you are interested in us covering that aren't on the upcoming agenda. Like I said, we have – we'll post these to the web as soon as we can.

And also, we'll have another one of these webinars on PV on January 25<sup>th</sup> at the same time, which is 12:00 p.m. Colorado time and 2:00 p.m. Eastern Time. Thanks so much, and have a great afternoon.

*Operator:*

Thank you. That does conclude today's conference. You may disconnect at this time.

*[End of Audio]*