Better Buildings Residential Program Solution Center Demonstration

Amanda Chiu: My name is Amanda Chiu, and I'm with Energetics, Incorporated, on behalf of the U.S. Department of Energy (DOE) Better Buildings Residential Program. Thank you for joining us today, and welcome to a demonstration of the Better Buildings Residential Program's Solution Center. We have with us today Danielle Byrnett with the U.S. Department of Energy. Danielle is the supervisor for the Better Buildings Residential Program, and overseas, DOE's Existing Homes Program.

Before we get started, let's go over a few logistics. First of all, everyone has been put on mute to prevent background noise during the presentation today. So if you haven't already, and if you're using a phone to join us, please enter your two or three digit audio pin number. And your audio pin is in the control panel box on the right side of your screen. Just press pound and then the two or three digit number, and then pound again. And then, we ask you to do that so we can unmute your lines if you have any questions later during today's presentation. And if you're listening to the presentation through your computer speakers, you will not be able to ask questions orally.

So during the Q and A part of today's webinar at the end, you can virtually raise your hand by clicking on the blue circle button with the hand in the control panel, and we can unmute you. And you can also type in questions at any point during the webcast, during today's webinar, in the questions box in the control panel. And we will make sure to address those questions.

Lastly, today's webinar is being recorded, and the recording and the presentation itself will be posted online, and we'll make sure to email you with the link once they're available. OK. All right. So that's it for logistics. So I'm going to turn the floor over to Danielle for the demonstration. Danielle? All yours.

Danielle Byrnett: Great. Thanks, Amanda. Welcome, everyone. We're really excited to share with you the new Better Buildings Residential Program Solution Center. I am going to share with you what our agenda looks like for today, and we will leave plenty of time in the middle and again at the end for questions. And you'll have the opportunity to see what the Solution Center is all about through both some slides and background and a live demo. So we're going to start with trying to get a sense of the folks who are participating in the webinar, so I know what pieces to emphasize. We'll talk about the components of an effective energy efficiency program, which is really what the Solutions Center is all about. Talk about structure, and then we'll show you the content through a live demo of the website itself. And then we'll do that for about 15 minutes, and then go to questions and answers. In order to get us started, we're going to kick off with a little more information about the folks who are participating, and then we'll jump into the details. So Amanda, would you set up the poll?

Amanda Chiu: Sure. Let's see… Here we go. Ok. So Danielle mentioned, we're very interested in knowing and understanding who's in our virtual room today. So please select the options that most align with what you do. Your top responsibilities. So what do you do? Are you involved in designing or implementing an energy efficiency program? Do you assess or install efficiency measures in homes? Do you conduct energy efficiency research, or any other related research? Do you train program staff or contractors? Or do you do something else that's not listed here? And I'm sure a number of folks wear multiple hats, so please just chose the option that is probably the most… your main area of work.

OK. Great. So we're going to close the poll now. And the results are here. So it looks like the majority of people in the room today work on designing or implementing programs. 29 percent. And 25 percent, a quarter of the people on the line today, work in assessing or installing energy efficiency measures in homes. Followed by 18 percent who are doing other. So that's very interesting. If you're one of the folks who selected other, I welcome you to just type into the chat or questions and just let us know what you do. And then 14 percent of folks on the line conduct research. And then the other 14 percent train program staff or contractors. Great. Well thank you very much for your participation in that. OK.

Danielle Byrnett: Great. Thank you. Well that sounds like we have a very diverse audience today. Which is kind of exciting. The Solution Center itself is primarily targeted at program administrators and implementers, so our 28 or 29 percent, I don't remember, who actually deliver programs. We also expect that folks who are involved as service delivery partners, those who go into homes, contractors, assessors, etcetera, will find a majority of the information valuable, and will help them be more successful as they work within the context of residential energy efficiency programs. And then we have also catered to program evaluators. We know that there are numerous resources in here that can be helpful for program evaluations, for baselining comparisons, and for example evaluations. So it sounds like we have done a pretty good job of getting our target audience onto the webinar, and I'm excited for you to be able to see what it is that we have created to help you perform your jobs that much better. And the real purpose of all of this is just that, and to help folks refrain from starting from scratch. There's been a lot of variability and a lot of new actors in the residential efficiency space over the last, at least five years, frankly much more. And so DOE recognized that not a lot of information was really written down to describe what's happened in the past, how well it worked, what some opportunities might be for new directions and expanding into, expanding successes and replicating them.

We found some reports here and there, but not all of that information in one place. And through talking with our stakeholders, which has included many of you folks, we learned that there really was an appetite to be able to understand and take advantage of past efforts. So Solution Center is really designed to help programs minimize trial and error on their path to success, as their planning, operating, and evaluating their programs. It's important to note, though, that we are releasing this as a new resource and materials. It is intended to be a living repository, so we will be continually expanding and updating it as we go. And I'll talk about that a little bit more throughout the presentation.

So the content for the Solution Center really reflects the expertise and the experience of numerous types of potential program administrators and partners of DOE and other entities. The majority of the content and the examples come from DOE's Better Buildings Neighborhood Program, which was a Recovery Act funded program that operated in almost 100 communities through 41 state and local governments between 2010 and 2013. It also reflects the experience of home performance with ENERGY STAR sponsors across the country, utility program administrators, and other energy efficiency organizations. So it's wide reaching content, it includes resources from all of the organizations you see here at the bottom, but also much more. And there was a lot of new content that was generated specifically for the Solution Center.

And the last bullet, of course, is you. We invite submissions by users. I'll show you later in the presentation where you can find the information about submissions, but we would love to keep this up to date. We would love to fill in gaps where there might be some. If you have examples that might be relevant to the topics we're talking about, or where we discuss different approaches in the Solution Center, we would roundly welcome you share with us what those examples are, and we would love to consider including it.

One other note is that the content in the Solution Center is really targeted at existing home programs, not new homes. ENERGY STAR and the Zero Energy Ready homes programs cover the new homes base very well, with a target audience of program administrators and builders. This is really intended to help those who are working with existing homes, which represent more than 90 percent of the building stock in the United States.

Before I show you the Solution Center itself, I'm going to step back briefly—just what we have come to the conclusion are central components of an effective residential energy efficiency program that's targeting existing homes. Because this forms the backbone of what you'll find in the Solution Center. So there are six major components, and I'm going to go through them one by one, but you can see up here where we're heading. Market Position and Business Model, Program Design and Customer Experience, Evaluation and Data Collection, all supported by Marketing and Outreach, Financing, Contractor Engagement and Workforce Development. So let's go through those.

So the first piece is really answering the question of who are you? And a successful program understands what the opportunities and constraints are of their organization in the marketplace. They understand the market for products and services in their locality, whatever that reach might be, whether it's thinking about geography or thinking about income strata. And they understand what it is that they're good at. What are they capable of, and who might they need to partner with in order to meet the needs of potential consumers in the market.

The program design and customer experience piece really answers the what do you do, of course, but the key takeaway there is that a program needs to make things simple for a customer, ensure a customer-centric process that ensures the customer is cared for from beginning to end, that they don't drop off, and we end up losing them as a potential project that's completed at the end. And that we are creating opportunities to engage that really reflect what customers want.

The third piece from our top row is how well do you do it? And that of course is your program design. And we answer that through evaluation and data collection. So it's important successful programs develop effective data collection and evaluation strategies, so they can understand in both real-time for continues improvement and over time, what the impacts of their program are. This helps with adjusting course as needed when actually implementing, and also claiming savings, claiming benefits, to be able to talk about what it is you're really achieving, to garner more support from stakeholders and funders, etcetera. So successful programs really think about and have a plan for attacking each of these pieces. They also get into the details, of course.

So the three final program components really relate to the program design and some of the specifics around program design. The first is marketing and outreach, which is where almost everyone wants to start, because it seems like the most fun part. But this addresses, how do you find your customers? How do you understand which potential consumers out there are really going to be your customers? How are you going to motivate them to actually take some action, not just agree with you and be interested, but go through the process, engage with your program, and have them be a likely customer to go through the entire process?

The next one is, how will your customers pay for the upgrades you want them to install? And financing is certainly one of the ways to do that. So it's important to note that we don't talk about an expectation that all programs offer financing; there are lots of opportunities to partner with financial institutions for whom that is central to their business model, and so ensuring customers have access to affordable financing or that they're going to be able to pay for services doesn't necessarily mean that you are the one as a program administrator who's going to be paying for it or giving them the loans. And we talk about that a lot.

And then the last piece, which is perhaps the most important, is the partnership with contractors. Those are the folks who are actually going to go into someone's home and do the work. So designing a program that provides value for contractors that aligns with their business models and ensures that the contractors who are in homes are appropriately trained: they have the skills that are needed, and that they're really engaged in a partnership with your program. And sometimes that involves workforce development and actually offering opportunities to enhance skills, whether they're technical or business skills, but no matter what, always involves true contractor engagement and partnership. And that's one of the hallmarks of the most successful programs out there.

So with that as a backdrop, we at DOE worked with the grant recipients that I mentioned from the Better Buildings Neighborhood Program, home performance sponsors, and numerous others to distill effective program elements into those six buckets or those six categories. And we used that to create the Solution Center itself. And now I'd like to jump into some of the key pieces of the Solution Center and how it's organized. And then I will take questions before we go to the live demo.

So the Solution Center itself, you're looking at a picture of the home page, we will also bring it up, and if you want to be following along on your own, it's energy.gov/rpsc, for Residential Program Solution Center. And the Solution Center is centered by those program components we just talked about. But you can also explore the resource in it by program design cases or thinking about where you are in the development of your program, whether it's planning, strategy, implementation, or evaluation. And what I'm showing you right here is a framework for accessing all of the content in the Solution Center. As you can see across the top, we have those program components, and on the left side are the program design pages. This is actually an index that's accessible in the Solution Center. And you can see that we have a consistent structure across the entire Solution Center. So for marketing and outreach, you can get information about how to assess the market. You can also get comparable information about how to assess the market when you're thinking about contractor engagement. And similarly for developing implementation plans, delivering your program, and communicating about the impact. So you will see a number of… what the links look like as we go through the next 40 minutes, but know that it all lines up in a consistent way. So once you get started in one of these handbooks, you'll have the opportunity to understand how it all works.

So each of those links would take you to what we call a handbook in the Solution Center. And this is where the majority of content is. All of the real text, not just resources. I'm going to walk through a handbook, each of the tabs, and show you what kind of information you would find. For each of these handbooks, you'll see that they are for a different program component or a different stage, so you just get some flavor of what kind of information you will see.

So the first tab in every handbook is the description. And it explains why that stage is important, and what a user or reader will learn. This allows you to check in to see that you're in the place you thought you wanted to be. What we're going to address in this handbook is the kind of information you're looking for. You might often find a key resources box or other links that can send you to comparable information. So here under contractor engagement in our overview, we have links to guidelines for home energy professionals and the Building America Solution Center, both of which provide extensive resources for contractors.

The next tab in every handbook is the step by step. And the step by step describes what and how. What is it that you actually could do or should do when you're working through this particular stage, and how would you go about doing it. So each of the steps has displays in the collapsible fields. So you can click on one of these and actually expand it to get the details. So you have a quick of seeing which steps you might be interested in and want to look at, at that point, but not all of them. In this one, we're in market position and business model, and we're describing how to assess the market. Specifically, the step we opened is around potential market demands. And this describes a number of places that you can go to understand state, local, and regional policies, which influence market demand and certainly are an important part of understanding what the business environment is—what you're operating. And this includes links to a few databases, resources for policy information, etcetera.

Our third tab in each of the handbooks is the one that probably most people will want to jump to. This is called the tips for success. And these reflect the lessons learned from dozens upon dozens, almost a hundred, different program implementers across the country over the last five years. DOE asked them multiple times, what were some of the kinds of things that you wished you hadn't had to learn through experience? What were some of the challenges you faced and how you overcame them, that you would want to help someone else in a similar situation overcome without the painful process of learning by doing. And so we refined those over time and distilled it down to roughly top ten type lists for each handbook. The tips for success in program design and customer experience you see here includes things like keeping the program simple for customers, providing customers with a single point of contact to help customers through the process, emphasizing the action you want a customer to take when you are putting together your offers, your materials, your incentives, etcetera. One of the other ones is making upgrade options clear and concise for customers. When you open any of these tips of success, which operate functionally the same way as step by step, you'll see a paragraph of information or so about why this tip is important—what barrier it's trying to overcome, how has it been applied over time through different program experience. And then you'll find explicit examples from programs that have in fact gone through the process of making upgrade options clear and concise, what it is that they did, how it worked, and potentially even more links to additional information. In this example, you can see at the bottom right, when we're talking about LA County's program, the Flex Path link has a PDF logo next to it, so this is a resources you can open up and download. And you'll find resources and hyperlinks throughout to get you more information. Also in the tips for success, we have embedded numerous videos—these are five minutes or less. These are videos from program implementers in their own words talking about what it is that they learned, and how it was important to them and valuable. You can get more information, additional detail around some of these tips for success, straight from the folks who have learned that lesson themselves, the hard way.

So our fourth tab is called examples. And these are curated examples in the form of case studies, program presentations and reports, and other materials from energy efficiency programs. All of these are materials that were developed by or for the programs themselves that they've actually used or that describe a specific program and how it's operated. And you can grab these by just clicking on any of the links. And it is a curated list; it's not everything in the Solution Center, but it's one we and our experts thought were the top hits—the ones you'd be most likely to want to take a look at. So this one includes a case study on Austin, Texas, and their efforts to use a short term promotional offer to get hundreds of upgrades completed in a really short time period. And how they've talked about that within the context of financing.

Moving on to our fifth tab is our toolbox. The toolbox includes downloadable templates and forms and tools and calculators. These are materials that other colleagues' programs around the country have used and said that they would be happy for others to adopt to use themselves. It also includes templates and forms that DOE has developed in support of residential efficiency programs. And you can find both of those types of things in there, and EPA. So one example is the Connecticut workshop survey. This is a piece of collateral that the Connecticut Neighbor to Neighbor Energy Challenge created, that they used when they were doing workshops and wanted to get some information about how they were being received. So you can take a look at this, decide if some of the questions might be helpful for your thinking about the workshop survey, and copy those and use it instead of starting from scratch.

So last tab is called topical resources. This is the kind of information that most people find on websites. This is where you'd find presentations, publications, webcasts, the reports that get published regularly, and again, we have a curated list in this tab of the handbook. You can also find additional resources through a search, but the topical presentations and topical resources relate to something about the stage at a higher level. So it's not specific to just one program, but takeaways that might be relevant broadly to numerous programs or provide guidance to numerous programs, numerous entities that are trying to do something similar. So in the presentation piece, one example we have here is five steps to a profitable contractor base. This is from a conference that DOE hosted and describes engaging business partners. So within the contractor engagement context, how would you engage contractors and be sure that you're delivering a program that works for them and that helps them with their own profitability and helps you meet your goals as a residential want efficiency program.

So those are the tabs in the handbook, but I also wanted to show you a few other features in each handbook, so that you know some of the options for how to work with this and use it. Then we'll jump into the live demo. So as you can see on your screen, we've highlighted that just above the tabs we were going through, on the upper right hand corner, there's an option for "print this page" and PDF. So essentially, if you want to be able to print the entire handbook, you can actually hit print this page and it'll come out nice and formatted from HTML, and you can print and go. If you actually want to save the handbook, you can do the PDF version, and it will download for you. You get all of the tabs of the handbook with all of the hyperlinks being active, and you can actually save it, take it to someone, print it of course, but it'll be a fully functional PDF. Also at the top of each handbook, moving to the left side, is a "where am I" hyperlink. The "where am I" hyperlink allows you to understand what handbook you're in, relative to all of the other handbooks in the Solution Center.

So we're in program design and customer experience: make design decisions. When you click "where am I," you can see program and experience. I'm in the strategy development stage of things, and I'm almost all the way to planning. If you are finding the kind of information that you like here, and you also want to read, what does “make design decisions” look like in financing, or in marketing and outreach. Now you have a map to help you get to where it is that you want to go and provide that kind of context. Also, if you want to go forward or backward in the handbook, you can get there very easily this way.

The last two buttons at the top of a handbook, just above the tabs, are the favorites, which I think is really cool. You can click the heart to add any handbook content or search materials, resources, to your own customized favorites folders. So if you create a login, you register and create an account, which is free, and a place you like that you want to come back to, you can just click on the heart and it will save that piece in your favorites folders. I’ll show you that in one second. You also have that option within any resource. So it’s not necessarily just for a handbook. You can save a whole handbook, and you can also save a particular resource. You’ll see this when I show you the search and filter later. As you can note, in the upper right hand corner, you can create different folder. So you can save any of these resources to any folder you want, and you can create as many folders as you like. So you can see from this last slide on the favorites, once you’re logged in, at the top of any screen, you’ll see a “my favorites” button. If you go to that, you’ll find all of the handbooks and resources, broken out by category as they are here, that you have saved for your favorites. So you can come back to them easily, if you know something caught your eye and you’ll want to go back to it, but you don’t have time right now, so rather than creating an additional bookmark through your browser, you can actually do it straight here through the Solution Center.

And then the last piece is subscribe. This is comparable in customization, but has a different function. If you click subscribe for any handbook, you can be notified whenever updates are made to that handbook—anything substantive. So if we add new resources in the examples or an additional tip for success, or we change something, some of the text in the step by step. If you subscribe, you’ll get a notification. You can select whether you want to receive those notification emails daily or weekly. You can also take a look at all of your subscriptions and change them as you like. You can subscribe to changes, be notified if there are changes to any handbook, to anything in a program component, anything in a program design space, if you’d like, or also by content type. So if you know you’re really just tracking case studies, and if there are any new case studies uploaded to the Solution Center, you want to be notified, you can, through your account, select that box and we’ll let you know whenever there’s a new case study added. So this is an interesting customization feature you can add. And the way you get there is through the home page or anyplace else in the Solution Center in the upper right hand corner above the search box. There’s a register button, or a login once you’ve registered, and that’ll allow you, once you’ve registered, to use my favorites and subscribe.

The last piece that I wanted to mention before we go to the examples is that we do have a page about how to submit content for potential inclusion. You can find the submission guidelines. By submitting, you are granting us permission to feature your materials, and we will thank you for it if we do. And you will ultimately end up emailing them to our Solution Center email address which you can find on the screen and also on the website. So Amanda, why don’t I pause, and let’s see if we have any questions before we jump into the live demo.

Amanda Chiu: OK. It looks like we don’t have any questions at this time. Just a reminder, if you do have any questions at any time, feel free to type them into the question box, or you can raise your hand virtually, and we will address the questions at the end of the presentation.

Danielle Byrnett: Great. OK, well then let's force some engagement. Would you please bring up the next poll, and we'll find out what kind of examples would be most interesting to the people on the webinar today.

Amanda Chiu: OK, great. So… What example are you interested in seeing? What kind of information are you interested in finding out about in Solution Center? We have a couple options here. What we'll do is walk through probably the top three questions here. So the options are, starting at the top:

- A program needs contractors to perform upgrades. How do I identify or recruit contractors to develop a local workforce?
- Second option is more along the lines of, program is starting soon, and you want to research what the market for energy efficiency looks like in your community. What should I do to understand the market?
- The third option here is related to an organization that doesn't want to run a financing program on their own. What are the tips on developing an RFP to find a partner—a financial institution perhaps—for financing that a customer needs?
- The fourth option here is looking to explore how to create or improve a quality assurance program. What kind of resources and information do we have there?
- And the last option here is along the lines of collecting data to assess program progress. How should I think about investing in an IT system?

So please select the top question that you're most interested in, and we'll make sure to walk through the top three examples during today's webinar.

Danielle Byrnett: And if there's a different example that you're interested in specifically, feel free to type that in at any point over the next 20 minutes. If we have time, we'll get to it. I'd be happy to walk you through.

Amanda Chiu: Great point. So we'll close the poll in five seconds, so select your options now please. All right. So let's close the poll. And here are the results. So 30 percent of folks on the line are interested in our second option on understanding the market, assessing the market. And then 23 percent of you are interested in tips on developing an RFP to find a financing partner. And 20 percent responded with interest on how to identify and recruit contractors to develop a local workforce. So Danielle, why don't we start with the second example on understanding the market.

Danielle Byrnett: Sounds great, thank you. OK. So hopefully you can see that I have moved the presentation to the live website. And again, if you want to follow along or do your own exploring at this point, you can get there easily by typing energy.gov/rpsc. So we are on the home page, and we are going to go figure out how to assess the market. And the way that I would start doing that is by going to our program design stage page. Not exactly sure where assess the market would be otherwise, and we want to be able to figure out where we're going to find the kind of information that we need.

So if you see our program design stage page, it describes what the different stages are, and where you're going to find the kind of information you want. Fortunately, assess the market is the first one under strategy development. And so we can go straight there to the strategy development and it will bring up all of the handbooks that relate to strategy development. And we have the option of selecting the handbook that talks about assessing the market for contractors, for financing, for market position business model, market outreach, you can see where I'm going with this. Assuming we're interested in the broader marketplace, let's pick the one for market position and business model. And that will take us to the handbook for market position and business model. You can find, when you get here, you can see all of the tabs that we went through on the webinar, so far at this point. You can see a general description of how to assess what kind of energy efficiency activities and actors exist. So assessing the nature of current and potential demand for products and services.

The handbook will also talk to you about identifying how the market is already being served by other organizations. So you can figure out where your organization can provide value. And we'll also walk you through some analysis around your organization's strengths, capabilities, constraints, and providing products and services. These are the kinds of things you'll find in this handbook around market position and assessing the market.

You might decide that you actually thought that this was where you were going to want to be, but as it turns out, you're probably looking for information about identifying and prioritizing or assessing the market for target audiences. So as you can see, if you scroll down, for any of these handouts with a description, you'll see what are the comparable handbooks to this one in the other program component. If we're actually more interested in target audiences than in service delivery options, you can get there very easily by clicking at the bottom for the assess the market handbook for marketing and outreach, and you'll see that it describes what kind of topics are described in the marketing and outreach, assess the market, which in this case relate to audience research and target audiences. So that is one of the ways of getting at assess the market, probably the quickest one. And it includes things like tips for success and examples, of course—case studies and reports for how to assess the market.

So I think Amanda you said that the next one that was of interest was around developing an RFP around financing services. Is that right?

Amanda Chiu: Yes, correct.

Danielle Byrnett: OK, great. Let's go back to our home page. And since we know we want financing this time, we will select financing from our handbook, and if you select any of those icons in the beginning, it's going to take you to the overview handbook for that particular component. So we're here within financing, and if we want to do an RFP, or we want to think about partnering with a financial services company, we're probably talking about identifying partners. You can see here that we have information about partnering with financial institutions that can help your customers access financing. So let's go into that handbook, in order to see where we talk about things like RFPs.

So we are in the identify partners handbook for financing. And you can see that this handbook describes the types of lenders that might be able to offer capital services and also the process for engaging lenders, soliciting for proposals, etcetera. That's exactly what we wanted—we wanted to understand how to do RFPs. In the step by step, which is our what and how section, we can find things like identify lenders, engage lenders, determine the process for soliciting proposals, evaluate proposals, and negotiate and execute.

Let's take a closer look at the process for soliciting proposals. And you'll find in here detailed information about the different options that you face when you're thinking about engaging with a financial institution, and specifically at what point in your process you might want to do an RFP. In this case, we're talking about the option to engage for a formal partnership early on in the process, versus through information processes, and then identifying a lender who can meet your target audience, so coming up with options and then engaging in a formal process. And either is fine and appropriate. You'll find information about pros and cons in here. We do note that involving your lender partners in the decision making process helps build confidence and is more likely to lead to success, because you'll have a shared vision for your program. But as you keep going down, you'll see we even have key items to include in your RFP. Program background for you to include, things about your specific program and market, and then suggestions for items to ask lenders to respond to. And as you can continue going down, you'll also see that you can get to examples and toolboxes within this handbook that will give you more opportunities to avoid starting from scratch when it comes to developing the scope of work and your RFP.

So the examples tab includes various program materials, sample RFPs that other programs have used when they're trying to engage lenders, and in the toolbox, you can find templates and forms, including a template financial institution RFP that the Department of Energy developed in 2010, when we were helping a lot of programs develop these kinds of partnerships. So I just clicked on a PDF, and the PDF comes up, you can download it and you can actually see example language that you can adopt and use, if it works for you, for designing and putting out an actual RFP for a financial institution partner.

So that is our second example. And I believe Amanda you said recruiting contractors was the third one that folks were interested in?

Amanda Chiu: Yes it is.

Danielle Byrnett: OK, great. So let's go back to our home page. If we are interested in contractor engagement, of course we can go to our contractor handbook and get to our overview. And as we've already described at this point, we know that there are different stages and engaging contractors would be pretty comparable to looking for financial institution partners. So we'll select our identify partners handbook and go into our step by step. Comparable to what we saw earlier, we have steps for developing strategies for contractor recruitment. And this will describe through text, bulleted information and links to additional handbooks and examples, different strategies that have been used by various programs across the country to engage contractors, get them interested in participating with the program. You'll see one example here is of an HVAC contractor who moved into home performance. We have also a little mini case study example here about a program in southwest Pennsylvania which did quite a bit of work to engage contractors and get them involved. And then even some case studies that are embedded in the text around step by step. So this one is a Better Buildings case study on Portland Oregon making the program work for contractors. And you can get a PDF of that example right from the handbook, without having to navigate away from the handbook and get yourself lost.

So those were the specific examples. I would love to show folks also a couple of other features that the Solution Center offers. It looks like someone sent in a question about historical things. Let's chose that as our search. I wanted to show you that on the upper right hand corner of the Solution Center, there is a search box, and it will accept any search terms that you want to use. So Amanda, did you get a specific question? Do you want to reiterate what that was?

Amanda Chiu: Sure. The question was general: Are there resources specific to historic buildings in the Solution Center, and how are historic buildings covered in the Solution Center?

Danielle Byrnett: Great, thanks. So historic buildings as a topic would be something that you'd find resources on that we have specifically tagged with those key words. The way that you might think about how the Solution Center would help is that it'll walk you through understanding the market of buildings in your area. So that's under the market position and business model section. And I'll walk you through the steps to find resources for identifying what kind of building stock you actually have, and how to think about ways you might want to tackle that. Then what kind of partners you would engage with, and then think about your program design. So the answers to some of those questions might be that your building stock includes a lot of historic buildings, and then you need to engage with the appropriate partners, like historic preservation societies, etcetera. And it walks you through how to identify who those folks are, and provides some examples. We'll use historic buildings specifically to test our search terms. And so you can see that the search results include four resources as of right now. And if you have more, please send them to us. We'll include them. So the first item is building infrastructure, retrofit historic homes in Charleston. We also have some information about market sizing and financial models. So this is talking about historical barriers to energy efficiency. Maybe not exactly what you were hoping for. Then there's also tips for success. Make sure there are enough target customers in your market to achieve your goals. And think about working with financial institutions when you do your RFP and how that might be relevant to historic buildings.

So within the filter, you can, if there were a longer list of pieces here, filter by the type of content. So we saw that two of these are tips for success. If we were only interested in tips for success or case studies, we can select one of those filters. Those are our two tips for success. You can also filter by state or territory. We know from the headlines that one of these was about South Carolina, so South Carolina shows up as an option. One of the resources is specifically about multifamily, one of the others is about single family, so you can select by building sector. And you can also find that we have tagged resources by organization or program.

So let's come up with another search term that we commonly use, where there might be many more options for filters to get to the kind of information that you're interested in. So I just typed in quality assurance. We have numerous resources about quality assurance. It's a pretty popular topic. If you were curious about where we discuss quality assurance, you could filter by content type to see just the handbooks where it's discussed and note that there are seven handbooks that touch on the topic. If you were interested maybe just in a specific region of the country and you wanted to know if we had information about quality assurance plans in a particular area, you might be interested in looking by state or territory. Or, if you thought there might be something about quality assurance with a particular program partner, you've heard about them before, you could filter by organization or program. You can see through the filter, a quick list of all the organizations or programs for which we have that kind of resource or information.

So that's a quick hit on our search terms. The last thing I want to mention before we go for questions is on the left hand navigation of the home page, you can find the handbook index that I showed you earlier. This gives you a quick link to all of the handbooks in the Solution Center. We also have factoids that are frequently, or facts that are frequently asked questions relating to residential energy efficiency. So DOE gets these questions all the time. We've put this information here to help you when you're thinking about your market assessments, when you're thinking about program materials. You might find it valuable to be able to quickly insert a factoid. We also have a glossary. If you are not sure what we mean by a certain term or are curious how we refer to different kinds of activities, you can see that we have a glossary that's hyperlinked by alphabet. We talk about home energy assessment, we talk about auditors as home performance assessors, etcetera. And you can jump around to all of those.

So Amanda, let me turn it back over to you, and let's see if we have any questions about the resources or the navigation in the Solution Center.

Amanda Chiu: Ok great, thanks. And so if you have any questions, feel free to type them into the questions box or raise your hands virtually. OK. All right. Well I think, Danielle, you probably addressed everything during your presentation.

Danielle Byrnett: OK. Very good. Well let me flip back quickly to our… If I can… Sorry… Here we go. Just wanted to also mention, for folks who are interested in the Solution Center and its materials, you might also be interested in the opportunity that we have to connect with colleagues around the country who are tackling similar challenges, coming up with innovative solutions, and developing lessons learned in real time that will help to expand what we have in the Solution Center as far as resources and opportunities, and that's our Better Buildings Residential Network. You can find out more at betterbuildings.energy.gov/bbrn.

Better Buildings Residential Network offers peer exchange calls that tackle many of the topics included in the Solution Center, and develop tools, templates, and resources that leverage what's happening in the Solution Center, what's there, and also add to what's in the Solution Center. Our network members get recognition in media and materials. There are new member requested initiatives that are ongoing. There's also a newsletter for updates on trends in the residential space. So I would encourage you to check this out if you are interested in this topic. Presumably you are if you are looking at the Solution Center.

And we'll end with one last slide with a hyperlink to the URL, and feel free to email us any time if you have suggestions, you have questions, you have concerns. The email address is at the bottom of your screen. And I will just say that we will make these slides available, and we will post this webinar on our website.

Amanda Chiu: And Danielle, actually a few more questions just happened to come in. I think there was a bit of a lag. So since we have a few minutes, I thought we could address at least a few of them. Does that sound good?

Danielle Byrnett: Great.

Amanda Chiu: Great. OK. There's a question on how much the Solution Center offers multifamily buildings. Is that covered, or is there an emphasis on single family buildings?

Danielle Byrnett: Great question. I will say that most of the examples relate to single family buildings, but there are numerous resources for multifamily buildings, and the process and steps suggestions are just as relevant to multifamily as they are to single family. But you will find that part of the reason we separated out by sector in the filters, multifamily and single family, is of course we know when it comes down to actually implementing, those two areas look pretty different. So you can search for multifamily and find all the resources we have in there, but the steps and stages and handbooks that are described are absolutely relevant.

Amanda Chiu: OK, great. And we have a question from Terry. Terry, I'm about to unmute you—I see that your hand is raised. Terry, are you there?

Terry: Here I am! Am I here?

Amanda Chiu: Yes, great.

Terry: Would any of the lenders… Do you know if it's feasible to use anybody other than a lending institution, such as a hedge fund that's looking for investors?

Danielle Byrnett: When we talk about lenders, we're typically talking about financial institutions, typically looking at credit unions, community finance development finance institutions, local/regional banks, there's been some involvement by national banks as investors. I'm not aware of any discussion in the Solution Center about hedge fund opportunities. But we do talk about secondary investments. Secondary investors and the possibility for selling portfolios to secondary markets. So that would be where…

Terry: …[inaudible] a hedge fund would be interested in the sale to the secondary market.

Danielle Byrnett: So there is definitely discussion about what would be necessary to get a loan portfolio ready for the secondary market. Specifically around standardization of the loan and documenting loan portfolio performance and whatnot. There is information like that in the Solution Center in the finance section.

Terry: That's wonderful!

Danielle Byrnett: And if you see any gaps, feel free to email us and let us know what you'd like to see in there as you're going through.

Terry: The only question I have is how am I going to access all of this when we're all done?

Danielle Byrnett: [laughs] energy.gov/rpsc.

Amanda Chiu: Thanks, Terry. And we have one more question. Is there a place where we can find information on energy use intensity in the Solution Center?

Danielle Byrnett: So if you go to the energy data FAQ, we can find some information… You can find information about energy consumption from the residential sector, household spending, etcetera. And also, at the bottom, when you're looking for more residential energy data, you can find the building energy data book, which does include tables about building characteristics, including EUI. Also, RECS (Residential Energy Consumption Survey) has energy intensity information. So yes, we've got links here for where you can get that kind of information. And again, we're in the energy data FAQ in the Solution Center. You can get to it from the left navigation.

Amanda Chiu: Great. OK. Well I think that's all of the time we have for questions today, so thank you, everyone. And thank you, Danielle, for leading us in today's demonstration. So we're going to wrap up today's webinar a tad bit early, so perhaps you can use that time to go check out the Solution Center.

And as a reminder, we will be sending you an email with a link to today's presentation and recording, and you're welcome to share that with… for your reference or with your colleagues.

OK. So I wanted to make sure to let you know that we do have one upcoming webcast that might be of interest to you. And that webcast is on providing an overview of the draft guide for benchmarking residential program progress. So we will send the registration link to you through the chat feature. You should have received it now. The webinar is taking place two Wednesdays from now—Wednesday December 3, from 2:30 to 3:30 Eastern Time, and you're welcome to attend. And DOE will be providing an overview on this new guide and looking for comments from you on the draft. So please join us and register for that webinar as well. So that wraps up today's webinar. Thank you again, very much, for joining us, and have a good day. Bye!