Better Buildings Residential Network Data & Evaluation Peer Exchange Call Series: *Program Automation*

Call Slides and Discussion Summary

November 21, 2013

Agenda

- Call Logistics and Introductions
- Featured Participant:
  - Chris Jones, Greater Cincinnati Energy Alliance
- Discussion:
  - What are some examples of programs using automation and what is the range of approaches available?
  - What are the benefits of automating various parts of the program and do certain aspects lend themselves better to automation than others?
  - What are the main challenges with automation and what are ways to overcome them?
  - Are there any other questions/issues related to program automation participants have?
- Future Call Topics Poll

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Call Participants

Austin Energy

Cadmus Group

Chicago, IL

Civic Works (Baltimore, MD)

Clean Energy Durham

CORE

DC Sustainable Energy Utility

Eagle County, CO

Efficiency Vermont

Energize New York

Greater Cincinnati Energy Alliance

Greensboro, NC

Kansas City, MO

Nashville, TN

New York

Spirit Foundation

Vermont Energy Investment Corporation

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Featured: Greater Cincinnati Energy Alliance (GCEA)

Highlights: GCEA

- Use a Customer Relationship Management (CRM) system to:
    - Serve as a hub for the program and contractors.
    - Connect to a website that allows homeowners to request an assessment.
    - Conduct QA services.
    - Process home energy upgrades to completion.
- CRM does not allow homeowners to connect into the hub to see the status of their energy upgrade.
- GCEA inputs the resulting customer energy data manually. The utility sends it as an Excel file.
- GCEA is looking at a contractor fees and other revenue sources to fund system operation and maintenance in the future.

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Discussion Questions

- What are some examples of programs using automation and what is the range of approaches available?

- What are the benefits of automating various parts of the program and do certain aspects lend themselves better to automation than others?

- What are the main challenges with automation and what are ways to overcome them?

- Are there any other questions/issues related to program automation participants have?

Lessons Learned

- Several programs are planning to fund automated project tracking systems with fees from other aspects of their program (e.g., contractor participation fees, loan processing fees, etc.)

- Several programs are using CRMs as their central project hub and have found ways to customize them to their needs at varied levels of cost.

  - Energy Smart Colorado has an à la carte style with web applications, such as Formstack, to keep costs low.

  - NYSERDA has two processes for forms to be uploaded into its CRM. Homeowners can either send their information to the program to be uploaded (at which point it gets reviewed by the program), or they can upload information directly into the system via a portal. Contractors also have these options.

  - Non-profits receive a discounted rate on Salesforce which can make it more cost effective for programs. Both Kansas City and Cincinnati house their systems with non-profits

Lessons Learned

- While some programs do not have difficulties gaining access to customer utility data, the format the data is available in can be a hurdle to using it.

  - Utility participation in the Green Button initiative (www.greenbuttondata.org) would allow these programs to acquire customer energy use data and use it in their systems in a more automated fashion. It has been difficult to get smaller utilities to sign up for the program so far.

- Energize NY has homeowners upload their data directly. For homeowners, understanding how to collect and submit data has been a challenge. To address this, they have video and written tutorials, people available to answer questions via phone, and grassroots outreach network through libraries who are getting trained to help answer data collection questions. The website instructions have halved the number of submission problems.

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Lessons Learned

- Tablets can be useful tools in the field for contractors to input data immediately into project tracking systems and reduce dual data entry.
    - Energy Smart Colorado integrated use of iPads during their workforce training component with contractors. They have PDF forms to input data. Many contractors were already familiar with the technology and were comfortable using it in the field.

Future Call Topics Poll

- Which of the following topics are of interest for future Data & Evaluation series calls?
  - Customer- and contractor-focused data tracking systems: 63%
  - Evaluating increases in real estate values from EE upgrades: 50%
  - Cost-effectiveness tests and measuring like a utility: 38%
  - Optional program benchmarking: 25%
  - Designing effective evaluation plans: 13%