



Better Buildings Residential Network Peer Exchange Call Series: *Leveraging Service Calls and Emergency Repairs*

November 13, 2014

Call Slides and Discussion Summary

Agenda

- Call Logistics and Introductions
 - Go-around – please be prepared to state your name, organization, and interest in the topic
- Residential Network and Peer Exchange Call Overview
- Featured Speaker
 - Robert McCracken, Project Development Manager, Greater Cincinnati Energy Alliance – *Residential Network Member*
- Discussion
 - What experience does your organization have with leveraging service calls and emergency repairs?
 - What approaches for driving demand for energy efficiency upgrades by piggybacking on immediate needs have you tried? Are there any lessons learned from those approaches?
 - What are some challenges with translating ideas to implementation? How have you or do you plan to address those?
 - What messages have worked well? Do they differ from overall program messaging?
 - Other questions/issues related to the topic?
- Closing Poll
- Ideas for 2015 Peer Exchange Call Topics

Call Participants

- Arlington County, VA
- Bloomington Commission on Sustainability
- Center for Sustainable Energy
- Clean Energy Works
- CLEAResult
- Community Power Works
- Corvallis Environmental Center
- Ecolibrium3
- Energy Programs Consortium
- Greater Cincinnati Energy Alliance
- green|spaces
- Midwest Energy Efficiency Alliance
- NeighborWorks of Western Vermont
- Philadelphia Gas Works
- Wisconsin Energy Efficiency Corporation
- Yale University

Better Buildings Residential Network

- **Better Buildings Residential Network**: Connects energy efficiency programs and partners to share best practices to increase the number of American homes that are energy efficient.
 - Membership: Open to organizations committed to accelerating the pace of existing residential upgrades. Commit to providing DOE with annual number of residential upgrades, and information about benefits associated with them.
 - Benefits:
 - Peer Exchange Calls
 - Tools, templates, & resources
 - Newsletter updates on trends
 - Recognition: Media, materials
 - Optional benchmarking
 - Residential Solution Center

For more information & to join, email bbresidentialnetwork@ee.doe.gov.

- **Better Buildings Residential Network Group on Home Energy Pros**

Join to access:

- Peer exchange call summaries and calendar
- Discussion threads with energy efficiency programs and partners
- Resources and documents for energy efficiency programs and partners

<http://homeenergypros.lbl.gov/group/better-buildings-residential-network>

Better Buildings Residential Network Group on Home Energy Pros Website



Better Buildings Residential Network

Created by Better Buildings Support

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Information



The Better Buildings Residential Network connects energy efficiency programs and partners to share best practices and learn from one another to increase the number of American homes that are energy efficient.

Website: <http://betterbuildings.energy.gov/bbm>

Latest Activity: 8 hours ago

Join the conversation in the discussion forum below. You can use the "Follow" link at the bottom of the forum to receive an email whenever a new discussion is posted.

Open the table of contents below and follow the links to access topical materials and resources.

Helpful Links

- Table of Contents
- Better Buildings Residential Network
- Better Buildings Neighborhood Program Website
- Home Performance with ENERGY STAR
- Home Energy Score



Table of Contents



+New Discussion



Peer Exchange Call Archive



Better Buildings Network View



Tools



Related Events

Discussion Forum



Attend Today's Peer Exchange Calls on Program Sustainability and on Workforce

Don't miss today's calls. "Collaborating with Utilities on Residential Energy Efficiency" begins at 12:30 p.m. Eastern and "Engaging Efficiency First Chapters and Other Trade Associations in Energy Efficiency Programs" begins at 3:00 p.m. Eastern.

Continue

Tags: Peer Exchange Calls

Started by Better Buildings Support 8 hours ago.



Register for Upcoming DOE Webinar About On-Bill Financing

Sign up to attend the DOE State and Local Energy Efficiency Action Network (SEE Action) webinar, "Case Studies: Financing Energy Improvements on Utility Bills," taking place June 11, 2014, from 2:00 to 3:30 p.m. Eastern. To learn more on this topic, read

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Home Energy Pros

Home Energy Pros was founded by the developers of Home Energy Saver Pro (sponsored by the U.S. Department of Energy,) and brought to you in partnership with Home Energy magazine.

Latest Activity

[What brings you here?](#)

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Tucker Henne commented on David Byrne's blog post Does Aereoseal work? An auditors review

"I would like to begin with a disclaimer that I am an Aereoseal contractor. One of the reasons I..."

16 minutes ago

T.J Alexander posted a blog post

So many homes have fiberglass insulation that is poorly installed in New Hampshire and elsewhere

Doing testing of existing homes it is typical to see mottled patterns of surface temperatures with...

See More

1 hour ago

[0](#)

CleanEdison updated an event



Entry Level Solar Photovoltaic at Cotuit, MA

September 30, 2012 to

Peer Exchange Call Series

- Calls are held the 2nd and 4th Thursday of every month at 12:30 and 3:00 ET
- Calls cover a range of topics, including financing & revenue, data & evaluation, business partners, multifamily housing, and marketing & outreach for all stages of program development and implementation
- Upcoming calls:
 - January/ February 2015 calls to be announced soon!
- Send call topic ideas or requests to be added to additional call series distribution lists to peerexchange@rossstrategic.com.

Peer Exchange Call Summaries

Discussion: Challenges and Solutions

- Overcoming Challenges - Solutions:
 - Access trusted, local messengers
 - Engage your satisfied customers as champions to turn them into "lifetime customers"
 - Invite people to make a pledge with a few simple EE activities they can take
 - Connect with the right local partners (Connecticut conducted "community asset mapping")
 - Directly involve the homeowner through DIY work or as energy efficiency demonstration homes to help them feel engaged (San Diego demonstration homes)
 - Minimize paperwork to make it easier to participate

20



Poll Results

Participant Poll: Which of the following best describes your program's experience with energy efficiency behavior change efforts?

- Currently implementing: 31%
- Planning to implement: 31%
- Thinking about it: 19%
- Haven't thought about it: 0%
- Not applicable: 19%

The screenshot shows the 'HOME ENERGY PROS' website with the tagline 'Connecting home energy professionals'. The navigation menu includes Home, Invite, My Page, Members, Forum, Blogs, Groups, Photos, Videos, and Events. The main content area is titled 'Peer Exchange Archive: Program Sustainability' and lists several call summaries with their dates and PDF links:

- [Incorporating Behavior Change Efforts into Energy Efficiency Programs](#)
July 10, 2014
[Presentation and Discussion Summary \(PDF\)](#)
- [Collaborating with Utilities on Residential Energy Efficiency](#)
June 12, 2014
[Presentation and Discussion Summary \(PDF\)](#)
- [BBRN Voluntary Initiative: Partnering to Enhance Program Capacity](#)
May 8, 2014
[Presentation and Discussion Summary \(PDF\)](#)
- [Complementary Energy and Health Strategies](#)
April 10, 2014
[Presentation and Discussion Summary \(PDF\)](#)
- [Mastermind: Jim Mikel, Spirit Foundation](#)
March 13, 2014
[Presentation and Discussion Summary \(PDF\)](#)

How do you eat an elephant? One bite at a time. A slight shift in perspective goes a long way.

Understanding how EE can solve a financial, public relation, or customer service problem for the utility is the right place to start.

Residential Program Solution Center

Web portal of residential EE upgrade program resources, & lessons learned to plan better, avoid reinventing the wheel.

- BB Neighborhood Program, Home Performance with ENERGY STAR Sponsors+
- Provides:
 - Step-by-step guidance
 - Examples
 - Tools
 - Templates
 - Lessons learned
 - Best practices
 - Tips
- Continually add content to support residential EE upgrade programs—member ideas wanted!



<https://bbnp.pnnl.gov/>

Program Experience: Greater Cincinnati Energy Alliance

Service Calls and Emergency Repairs



What we know

- Service calls and scheduled maintenance visits provide an opportunity for contractors to promote home performance services
- Emergency repairs provide an opportunity for contractors to sell high efficiency equipment and to promote financing programs
- Service calls and emergency repairs provide an opportunity for contractors to sell additional services

Service Calls



What we did

- Spoke with contractors about marketing home performance and the Energy Alliance program during service calls
- Provided basic marketing materials that service technicians could leave with homeowners
- Offered to create additional marketing materials to better meet the contractors needs

Emergency Repairs



What we did

- Developed an emergency loan product for energy efficiency equipment
 - 9.99% fixed rate with terms up to 10 years
 - No assessment required
- Provided materials to contractors
- Offered training on how to sell and use the loan

Service Calls and Emergency Repairs



What we found

- Service calls
 - Technicians are not informed about home performance
 - Technicians are pressed for time and want to get to their next call
- Emergency Repairs
 - With an emergency loan product, ease of use is critical and time is of the essence

Service Calls and Emergency Repairs



What we learned

- In our market, most contractors with a high volume of service calls and emergency repairs are not active in the home performance space
- It is important to educate the people on the front lines about home performance
- Marketing materials need to be designed for service technicians and sales staff to use

Service Calls and Emergency Repairs



What we learned

- The residential loan market is highly competitive
- Most contractors will choose “easy” over “better” if given a choice

Discussion Questions

- What experience does your organization have with leveraging service calls and emergency repairs?
- What approaches for driving demand for energy efficiency upgrades by piggybacking on immediate needs have you tried? Are there any lessons learned from those approaches?
- What are some challenges with translating ideas to implementation? How have you or do you plan to address those?
- What messages have worked well? Do they differ from overall program messaging?
- Other questions/issues related to the topic?

Presentation and Discussion Highlights:

Effective marketing strategies

- Technicians need to be trained on Home Performance and provided easy to use marketing materials, e.g. a simple home checklist of needed energy efficiency measures (attic insulation, efficient heating system, efficient hot water heater, etc.)
 - While it's important to coordinate with company managers/owners, it's imperative that the technicians receive direct training.
- Marketing materials may be most effective if they directly relate to the situation at hand (service call, emergency).
- Small contractors are more likely to be interested in selling Home Performance as a specialty/niche service (as compared to large contractors with more stable customer bases).
- Marketing Idea: Think about your house as you do your car; home systems (heating systems, roof, etc.) require preventative care to avoid emergency situations.
 - Preventative care service calls create opportunities to educate homeowner on energy efficient technologies and measures.

Presentation and Discussion Highlights:

Ideas for timely marketing

- In emergency situations, homeowners want their systems fixed or replaced immediately (comfort comes before anything else) and they likely haven't anticipated the associated costs.
 - Therefore emergency repairs are opportunities to sell efficient replacement units, but “up-selling” additional energy efficiency measures is difficult.
 - Additional efficiency measures are more effective when presented during routine maintenance calls.
- Energy Efficiency programs could encourage trade allies to find well-matched trade partners that provide each other with leads, thus indirectly promoting whole-house approaches.
 - Example partnership: Philadelphia Gas Works partners with trade allies (contractors, supply houses, etc.), influencing them to promote efficient heating and cooling systems.
- Example service model that could integrate energy efficiency marketing: Energy Efficiency programs could partner with companies that provide monthly service calls/repairs for a small (~\$20) monthly “insurance” fee, creating opportunities for home performance discussions.

Presentation and Discussion Highlights:

Financing options and lessons learned

- With emergency repairs, time is of the essence. While an Energy Efficiency loan product may be better for the homeowner in the long-run (lower interest rate), if it requires paperwork and delays the install it is not as competitive as the quickly-accessible manufacturer's loan products (which often have special short-term rates).
 - Contractors tend to promote loan products that are easy to use, have quick approval processes and are virtually paperwork-work free.
- Financing options:
 - To incentivize whole-house projects, programs could provide homeowners with lower interest rates for deep retrofits, and higher rates for single measure projects.
 - Homeowners could pay for emergency projects on their credit cards, then pay them off with a subsidized loan products.
 - Example federal loan options include:
 - **PowerSaver loan product:** financing option through the U.S. Department of Energy: <http://energy.gov/eere/buildings/powersaver-loans>
 - **Housing and Urban Development (HUD) Energy Efficiency Programs:** http://portal.hud.gov/hudportal/HUD?src=/program_offices/comm_planning/affordablehousing/training/web/energy/programs/hud

Closing Poll Results

- After today's call, will you:
 - Consider implementing one or more ideas discussed? **80%**
 - Extend your efforts to leverage service/ emergency repairs? **10%**
 - Make no changes? **10%**
 - Start leveraging service calls or emergency repairs? **0%**

Ideas for 2015 Call Topics

If you would like to share your experiences on a call or have ideas for a future call topic, chat them in now or contact peerexchange@rossstrategic.com.

Thank you!