



# Better Buildings Residential Program Solution Center

Danielle Sass Byrnett

# Agenda

- Overview
- Tour of Solution Center
  - Framework
  - Handbooks
  - Content through Examples
- Next Steps
  - Peer Review
  - Become a Beta User!
  - Future Enhancements

**Better Buildings Residential Program  
Solution Center  
Overview**

# Purpose: No More Starting from Scratch



- Help residential energy efficiency programs minimize trial and error to achieve success.



- Help programs and partners plan, operate, and evaluate their programs.



- Provide a living repository of examples, lessons, and resources.

# Audiences: Programs & Partners

- Target audiences:
  - 1<sup>0</sup> Program Administrators and Implementers
    - utilities, state energy offices, municipal governments, NGOs
  - 2<sup>0</sup> Program and Service-Delivery Partners
    - contractors, financial institutions, marketing firms
  - 3<sup>0</sup> Program Evaluators



# Development Timeline

## March - November 2012: Framework Development, Review, Consultation

Reviewed DOE guides, external literature, BBNP workshops and peer calls; vetted with stakeholders



## June - July 2012: Feedback from Key Partners & Intended Users

Feedback from EE NGOs and programs, identified complementary work, REES conference input and ideas



## July - October 2012: Drafted and Vetted Lessons Learned

Based on experience from 2 yrs of BBNP workshops and peer exchange calls, Now = Tips for Success



## November 2012 - April 2013: Platform Development

Built platform, designed content format, developed selection of handbooks



## April 2013 - April 2014: Content and Functionality Development (1<sup>st</sup> release)

All handbooks complete, additional Solution Center functionality developed



## May 2014 – September 2014: 1<sup>st</sup> Release Available During Peer Review & Beta Testing

Tips for Success enhanced, content & function vetted by external peer reviewers; beta users test all aspects



## Fall 2014: Public Launch (2<sup>nd</sup> release)

All content and functionality in place; ready for user submissions



# Solution Center Development Team

## Content Development

- Market Position & Business Model
  - Subid Wagley (DOE)
  - Athena Bertolino (Ross Strategic)
  - Rebecca Foster (Vermont Energy Investment Corporation)
- Program Design & Customer Experience
  - Megan Billingsley (Lawrence Berkeley National Laboratory)
  - Tom Beierle (Ross Strategic)
  - Richard Faesy (Energy Futures Group)
- Evaluation & Data Collection
  - Dale Hoffmeyer (DOE)
  - Stacy DeGabriele (Eastern Research Group, Inc. - ERG)
  - Nikki Kuhn (Vermont Energy Investment Corporation)
- Marketing & Outreach
  - Jonathan Cohen (DOE)
  - Kathleen Brady, Shannon Johnson (ERG)
- Financing
  - Steve Dunn (DOE)
  - Charlie Goff (ERG)
  - Matthew Brown, Dave Carey (Harcourt Brown & Carey)
- Contractor Engagement & Workforce Development
  - Megan Billingsley (Lawrence Berkeley National Laboratory)
  - Jennifer Tice, Darcy Peth (Ross Strategic)
  - Mike Rogers (OmStout Consulting)

## Editors

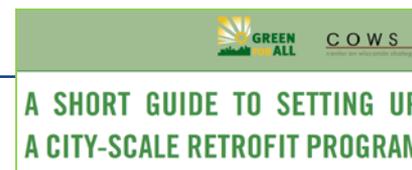
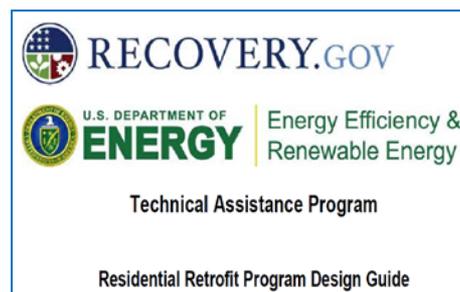
- David Lee (DOE)
- Danielle Sass Byrnett (DOE)
- Amanda Chiu (Energetics Incorporated)

## Platform Development

- Chrissi Antonopoulos (Pacific Northwest National Laboratory - PNNL)
- Michael Baechler (PNNL)
- Linda Connell (PNNL)
- Julia Walker (PNNL)

# Diverse Content Sources

- Content reflects the expertise and experience of:
  - Better Buildings Neighborhood Program grant recipients
  - Home Performance with ENERGY STAR Sponsors
  - EERE Technical Assistance Program
  - Guidance published by energy efficiency organizations about residential programming
  - *Future: submissions by users*



# Structured Criteria for Including Guidance and Examples

## Evidence Progression



New, relatively untested

### Innovation

- *Other websites*



Anecdotal evidence

### Promising Approach

- *Step-by-Step*



Qualitative data & multi-source anecdotal evidence

### Lesson Learned

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



Mature, fully supported, multi-source quantitative evidence

### Best Practice

- *Coming in 2015*

# What You Are About to See

- **Version 1 (beta) release**
- Contains ~95% of expected content
- Includes ~90% of features & functionality
- Allows users to review content, test the tool, and provide comments
- We welcome your feedback through this session or email: [BBRPSolutionCenter@erg.com](mailto:BBRPSolutionCenter@erg.com)

*Version 2 (full) release expected in Fall 2014*

**Better Buildings Residential Program  
Solution Center  
Tour**

# Solution Center Home Page

About

Handbook Index

Energy Data Facts

Glossary

Browse by Design Phases

Browse by Content Types

Browse by Program Components

**Better Buildings Residential Program Solution Center**

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

Solution Center Home

About

Handbook Index

Energy Data Facts

Glossary

BROWSE BY:

Program Components

Program Design Phases

Content Types

Center is a repository of examples, efficiency programs. It is intended to help generate, and evaluate their programs.

Handbooks

Market Position & Business Model

Program Design & Customer Experience

Evaluation & Data Collection

Marketing & Outreach

Financing

Contractor Engagement & Workforce Development

Explore Program Design Phase Resources

Strategy Development

Planning

Implementation

Evaluation

MY FAVORITES

Finance Favorites  
6 items

Marketing & Outreach Favorites  
1 items

New Favorites Folder

RECENTLY UPDATED RESOURCES

Program Design & Customer Experience – Deliver Program

Efficiency Maine Downloads and Forms Portal

New York State Energy Research and Development Authority (NYSERDA) Home Performance with ENERGY STAR Contractor Manual

EnergySmart Residential Survey (81 KB)

RePower Bainbridge Upgrade Survey (333 KB)

MOST POPULAR HANDBOOKS

Market Position & Business Model – Overview

Marketing & Outreach – Overview

Financing – Overview

Program Design & Customer Experience – Overview

Market Position & Business Model – Assess the Market

ACKNOWLEDGEMENTS

The U.S. Department of Energy thanks the following individuals who conducted an expert review of the Better Buildings Residential Program Solution Center handbooks:

Search

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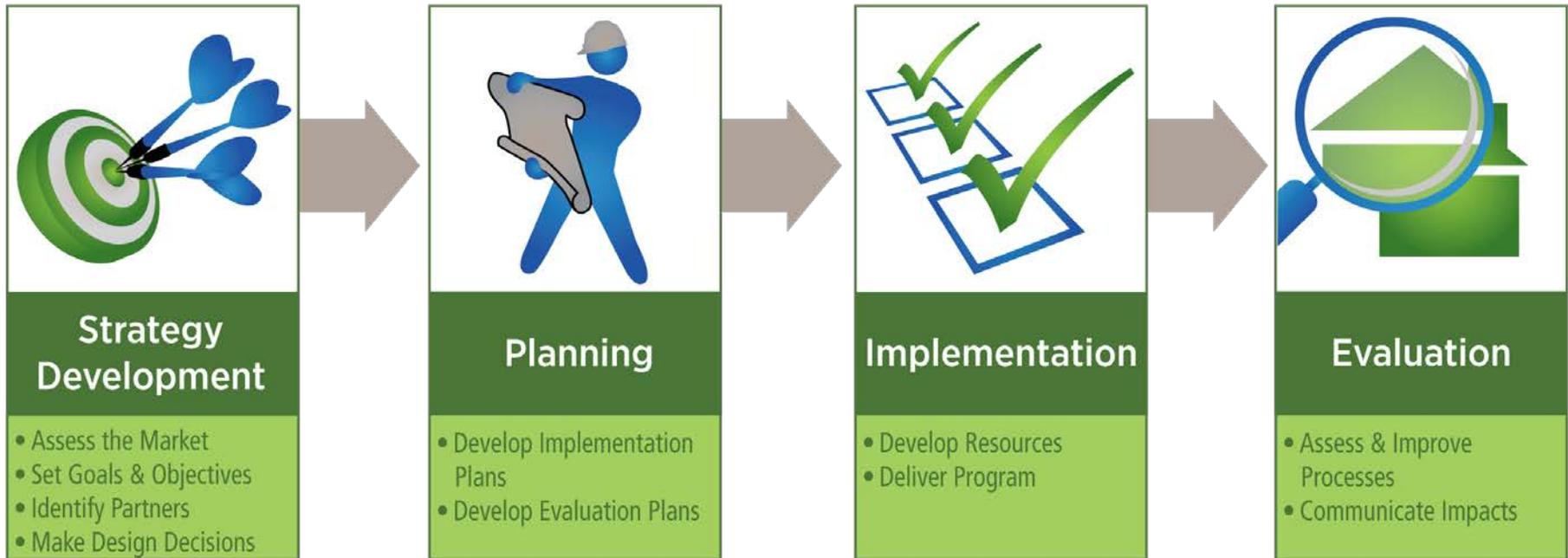
Recent Content

Popular Handbooks

# Content: Six Program Components



# Content: Four Program Design Phases



# 7 Tabs in Every Handbook

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

## Contractor Engagement & Workforce Development – Overview

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

### Description

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

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

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

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

#### Key Resources

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

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

### Market Position & Business Model – Assess the Market

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Description

Step-by-Step

Tips for Success

Examples

Toolbox

Topical Resources

### Step-By-Step

To determine your organization's market position there are several important steps to consider.

▶ Assess potential market demand for energy efficiency products and services

▶ Assess how the market is already being served by other organizations—and what gaps exist for your organization to fill

▶ Assess your strengths and capabilities to provide products and services in the market

[Expand All](#)

#### ▼ Assess potential market demand for energy efficiency products and services

As your organization enters the residential energy efficiency market or expands its existing role, make sure you have a solid understanding of current and potential market demand for such services. A variety of factors can influence demand. Examples include:

- Local, state, and regional policies (e.g., energy disclosure requirements, utility energy efficiency targets) that promote energy efficiency.
  - The [DSIRE database](#) provides comprehensive information on state, federal, local, and utility incentives and policies that are in place to support renewable energy and energy efficiency.
  - The U.S. Department of Energy's (DOE) 2007 report [State and Regional Policies That Promote Energy Efficiency Programs Carried Out by Electric and Gas Utilities](#) describes policies that could promote cost-effective programs, implemented by electric and natural gas utilities, to reduce energy consumption.
  - The [National Action Plan for Energy Efficiency](#) identifies key barriers limiting greater investment in cost-effective energy efficiency, describes policy recommendations to overcome the barriers, and documents policy and regulatory options for greater attention and investment in energy efficiency. The [State and Local Energy Efficiency Action Network](#) builds on the Action Plan by focusing on the assistance that states and local governments need to advance policies and practices that will bring energy efficiency to scale.

# Handbooks – Tips for Success (1 of 2)

## Tips: Lessons based on documented experience from multiple programs

**Program Design & Customer Experience – Overview**

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

### Tips for Success

In recent years, hundreds of communities have been working to promote home energy upgrades through programs such as the Better Buildings Neighborhood Program, Home Performance with ENERGY STAR, utility-sponsored programs, and others. The following tips present the top lessons these programs want to share related to this handbook. This list is not exhaustive.

**Make upgrade options clear and concise for customers**

Programs in many regions of the U.S. find that the concept of home performance is new to homeowners. These homeowners typically have little idea how energy efficiency measures compare (e.g., energy savings benefits of insulation versus new windows) and they might not have heard about some effective measures, such as air sealing. Several programs have devised simple approaches to help customers understand the energy and cost savings and other benefits they will achieve from various types of measures, so homeowners can choose what is best for them. Recognize though that customers may have other priorities when considering an assessment's proposed measure (e.g., improving the look of their home with new windows, replacing an aging furnace before winter weather sets in).

- [Austin Energy](#) developed a form to estimate energy savings using a point system that contractors could use with residents during a home assessment. The form helped contractors and customers quickly determine which measures would achieve 15% energy savings in the home. Texas A&M's Energy Systems Laboratory validated the point system for the program to ensure its accuracy and integrity. The program found that this streamlined approach was appealing to customers and contractors.
- [Los Angeles County's Energy Upgrade California](#) implemented the [Flex Path program](#) that used a point system to show the energy savings from a menu of energy upgrade measures. To be eligible for program rebates, residents then selected which measures they would like to undertake that would total over 100 points and achieve 15% energy savings.

▶ Keep the program simple for your customers

▶ Provide the customer with a single point of contact

▶ Make upgrade options clear and concise

▶ Keep the program simple for your contractors

▶ Emphasize the action you want your customers to take

▶ Measure and evaluate performance at key milestones

# Video Content (2 of 2)

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

## Tips for Success

In recent years, hundreds of communities have been working to promote home energy upgrades through programs such as the Better Buildings Neighborhood Program, Home Performance with ENERGY STAR, utility-sponsored programs, and others. The following tips present the top lessons these programs want to share related to this handbook. This list is not exhaustive.

[Expand All](#)

▼ **Adapt messages to your primary target audience's needs**

### In Their Own Words: Benefits of Market Segmentation



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

### In Their Own Words: Messaging to Motivate



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

# Handbooks - Examples

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

## Financing – Communicate Impacts

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

### Examples

The following resources are examples from individual residential energy efficiency program presentations and reports, and program materials. The U.S. Department of Energy

### Case Studies

#### [Spotlight on Austin, Texas: Best Offer Ever Produces Upgrades in Record Time](#)

**Author:** U.S. Department of Energy

**Publication Date:** 2011

*With its Best Offer Ever promotion, Austin Energy completed comprehensive energy upgrades in a record 564 homes in only six months--more than 10 times the utility's typical participation rate. To quickly develop momentum for BetterBuildings-Austin Energy's Clean Energy Accelerator program with homeowners, Austin Energy leveraged its existing Home Performance with ENERGY STAR infrastructure, experience, and contractor base but added a comprehensive rebate/financing offer for a finite launch period. Demand soared, and due to thoughtful planning, Austin Energy and its contractors were able to keep up with requests for energy evaluations, inspections, improvements, and loan origination, while learning valuable lessons along the way.*

#### [Using Credit Enhancements to Leverage Existing CDFI Capacity: Indianapolis](#)



**Author:** Lawrence Berkeley National Laboratory

**Publication Date:** 2012

*Highlights the EcoHouse Project Loan Program, which provides fixed interest rate financing for energy improvements among households that are otherwise unlikely to participate due to market rates.*

### Service Delivery

#### Spotlight on Austin, Texas: Best Offer Ever Produces Upgrades in Record Time

#### Key Takeaways

- Use valuable, short-term promotion to jump-start program interest
- Build on existing energy efficiency efforts to launch quickly and learn for the next iteration
- Plan for contingencies and resolve your errors

*"Getting on the landscape fast with some successes built positive momentum. There will be warts, so set reasonable expectations... but it is a great way to let people know you are on the scene."*

—Karl Rábago, Vice President, Austin Energy

#### Launch With a Short-Term Promotional Offer to Jump-Start Participation

With its Best Offer Ever promotion, Austin Energy completed comprehensive energy upgrades in a record 564 homes in only six months—more than 10 times the utility's typical participation rate. To quickly develop momentum for Better Buildings-Austin Energy's Clean Energy Accelerator program with homeowners, Austin Energy leveraged its existing Home Performance with ENERGY STAR infrastructure, experience, and contractor base but added a comprehensive rebate/financing offer for a finite launch period. Demand soared, and due to thoughtful planning, Austin Energy and its contractors were able to keep up with requests for energy evaluations, inspections, improvements, and loan origination, while learning valuable lessons along the way.

#### Figure 1. Best Offer Ever Promotion Results

Data reflect energy upgrades completed between October 1, 2010, and March 31, 2011, under the Best Offer Ever. The Best Offer Ever was only available to homeowners who signed up between October 1 and December 31, 2010.

Category	Count	Percentage
Energy evaluations	594	
Energy upgrades	564	95% of evaluated homes
Loans issued	564	100% of upgraded homes

#### The Best Offer Ever

Austin Energy's high-value promotion—the Best Offer Ever—presented customers who signed up for an energy upgrade between October 1 and December 31, 2010, with a significant financial incentive, resulting in 564 Home Performance with ENERGY STAR upgrades in six months. In the past, participants in Austin Energy's Home Performance with ENERGY STAR program received a free energy evaluation, but had to choose between a rebate or low-interest rate financing through a local credit union to complete the recommended upgrades. By signing up during the promotion, participants could receive both the rebate and financing, for a combined value of approximately \$2,300 per household. Even with the sizable incentive, Austin Energy leveraged \$4.39 million in loans using \$700,000 of its Better Buildings seed funding to pay for the incentives and marketing to launch the promotion.

The Better Buildings Neighborhood Program is part of the national Better Buildings Initiative led by the U.S. Department of Energy.

## Toolbox: Templates, forms, tools, calculators

### Evaluation & Data Collection – Conduct Evaluation

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Description

Step-by-Step

Tips for Success

Examples

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### Toolbox

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

#### Templates & Forms

[Los Angeles County Energy Issues Phone Survey](#) (194 KB)

**Author:** Los Angeles County, California

**Publication Date:** 2010

*Sample script Los Angeles County used to survey homeowners about energy issues.*

[Connecticut Workshop Survey](#) (76 KB)

**Author:** Connecticut Neighbor to Neighbor Energy Challenge

**Publication Date:** 2011

*Short survey for Connecticut's Neighbor to Neighbor Energy Challenge workshop participants. The workshop allowed the program to share its energy efficiency offerings with homeowners.*

[EnergySmart Residential Survey](#) (81 KB)

**Author:** Boulder County Energy Smart

**Publication Date:** 2013

*Example survey about a homeowner's experience with a visit from an energy advisor as part of EnergySmart in Boulder County, Colorado.*

)  
ou.

Town, Date  
nd 3/12/11  
Event Type  
Workshop  
Event ID:

\_\_\_ Efficient Appliances (please describe): \_\_\_\_\_  
\_\_\_ Heating, Ventilation, and Air Conditioning (please specify): \_\_\_\_\_  
\_\_\_ Clean energy (describe): \_\_\_\_\_  
\_\_\_ Other (please describe): \_\_\_\_\_

# Handbooks – Topical Resources

## Topical Resources: Presentations, publications, webcasts

### Contractor Engagement & Workforce Development – Deliver Program

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Description

Step-by-Step

Tips for Success

Examples

Toolbox

Topical Resources

### Topical Resources

The following resources provide additional topical information related to this handbook, which include presentations, publications, and webcasts. Visit [Examples](#)  for materials from and about individual programs.

### Topical Presentations

[The Contractor-Participation-Inducing Home Performance](#)

**Author:** Mike Rogers; OmStout Consulting, LLC

**Publication Date:** 2012

*Presentation summarizing the important elements needed for successful performance programs.*

[Five Steps to a Profitable Contractor Base](#)  

**Author:** Courtney Moriarta; SRA International, Inc.; Emily Building Performance Institute; Brad Geyer; Fayette County Department of Labor; Sam Flanery; Building Science Academy

**Publication Date:** 2012

*Presentation on five steps to building a profitable contractor business (administration, certification and credentialing, community vs. trade), and training and sales support.*

## Five Steps to a Profitable Contractor Base

*Session 2: Engaging Business Partners*

*Residential Energy Efficiency Solutions:  
From Innovation to Market Transformation*

Tuesday, July 10, 2012

Arlington, VA

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

### Market Position & Business Model – Overview

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

#### Quick Links

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

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

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

# Handbooks – My Favorites

**Better Buildings Residential Program Solution Center**

EERE » BTQ » Better Buildings Neighborhood Program » Solution Center Home » Program Components » Marketing & Outreach

Solution Center Home  
About  
Handbook Index  
Energy Data Facts  
Glossary  
BROWSE BY:  
Program Components  
Program Design Phases  
Content Types

## Marketing & Outreach – Deliver Program

[Where Am I?](#)

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- Finance Favorites  
6 items
- + New Favorites Folder

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

### Description

It is time to put all of your planning efforts to work on your program's marketing and outreach activities. As part of your program should be in place before you develop your [outreach partners](#), [staffing and workflow](#), [outreach materials](#), and [evaluation plans](#).

You and your partners will want to be ready for sudden program interest that can be generated by new marketing efforts. This includes working with contractors, relevant program staff, and financing the influx of energy assessments, upgrade work, related applications.

Your program will use a variety of marketing and outreach to reach your [priority audiences](#). As soon as your marketing is underway, you should also begin to [track progress](#) and use tactics to identify what works well in your local market.

### Marketing & Outreach

Pages:

- [Overview](#)
- [Assess the Market](#)
- [Set Goals & Objectives](#)
- [Identify Partners](#)
- [Make Design Decisions](#)

### Add a new Favorites Folder

Title \*

Marketing & Outreach Materials

A short, descriptive title for this Favorites Folder. Limit to 255 characters.

Save

# Handbooks – Where Am I?

## Where Am I: How the handbook fits into the Solution Center

### Program Design & Customer Experience – Make Design Decisions

Where Am I?

Description Step-by-Step Tips for Success Examples

#### Description

Successful energy efficiency programs address the opportunities, and challenges of their local markets. Programs likely to succeed aren't those that pick the most available options. Instead, you should develop a coordinated program with elements that are designed to overcome multiple market barriers. The greatest fit of your program to your local context is where your program is tailored to your specific market, your audience, and your budget.

- Your [market assessment](#), which identified needs in your target market. Your program will be designed to seize the opportunities and overcome the barriers to adopting energy efficient technologies.
- Your [program goals and objectives](#), which define the program's purpose and seeks to achieve.
- Your [partners](#) who will help you deliver the program. This includes understanding of local contractors and their capacity, and relationships with local utilities.

If your organization has a detailed [business plan](#), you can use it to guide your program design. If your organization does not have a business plan, you will make many of these types of planning decisions as you develop your program design. A business plan typically describes your organization's:

### Program Design & Customer Experience – Make Design Decisions

Overview

#### Strategy Development

- Assess the Market
- Set Goals & Objectives
- Identify Partners
- Make Design Decisions

#### Planning

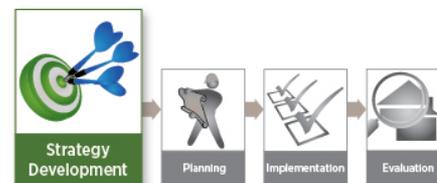
- Develop Implementation Plans
- Develop Evaluation Plans

#### Implementation

- Develop Resources
- Deliver Program

#### Evaluation

- Assess & Improve Processes
- Communicate Impacts



Better Buildings Residential Program  
Solution Center  
**Examples**

# Example #1 (1 of 7)

Our program needs contractors to perform upgrades. How do I identify and recruit contractors to develop a local workforce ?

**U.S. DEPARTMENT OF ENERGY** | Energy Efficiency & Renewable Energy

## Better Buildings Residential Program Solution Center

Contractor Engagement & Workforce Development – Overview

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

### Description

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

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

- Contractors that actively engage in your program and help meet your shared goals
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Recruiting, developing, and maintaining enough contractors to work with your program requires ongoing effort. Leading

### Key Resources

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- [DOE Building America Solution Center](#) provides home performance professionals with building science resources, integrated energy efficiency tools, case studies, and best practices designed to dramatically reduce energy use in new and existing homes. This website includes expert information on hundreds of high-performance design and construction topics, including air sealing and insulation, HVAC components, windows, indoor air quality, and more.

### Explore Program Components

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

Market Position & Business Model → Program Design & Customer Experience → Evaluation & Data Collection

Marketing & Outreach → Financing → Contractor Engagement & Workforce Development

Look Across Program Design Phases

# Example #1: Contractor Engagement Overview (2 of 7)

## Contractor Engagement & Workforce Development – Overview

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

### Step-By-Step

The following steps list important activities for Contractor Engagement & Workforce Development. Each step has a handbook that you need to take into account the unique needs of your program. Click on each step to access its handbook.

1. [Assess the Market](#) *Assess the quantity and capacity of available contractors and the skills of the local workforce.*
2. [Set Goals & Objectives](#) *Establish or refine specific workforce and contractor goals.*
3. [Identify Partners](#) *Establish relationships with contractors and training providers.*
4. [Make Design Decisions](#) *Decide on strategies for training, workforce development, and contractor recruitment.*
5. [Develop Implementation Plans](#) *Develop workforce development, contractor recruitment, and training plans.*
6. [Develop Evaluation Plans](#) *Develop a workforce quality assurance and evaluation plan.*
7. [Develop Resources](#) *Develop workforce and contractor engagement resources.*
8. [Deliver Program](#) *Implement contractor coordination and workforce development.*
9. [Assess & Improve Processes](#) *Monitor the effectiveness of workforce efforts, motivate continuous improvement, address low performers, and adapt as needed.*
10. [Communicate Impacts](#) *Communicate program results to workforce stakeholders and contractor partners.*

### Contractor Engagement & Workforce Development – Identify Partners

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

#### Description

A critical ingredient for your program's success is frequent engagement with contractors, initiated early and often. Your program may also want to work with training providers and local employment organizations to develop the skills of the local workforce and help connect those workers with jobs.

Your partners will include:

- Contractors that will become your most important service delivery partners
- Trade associations and economic development institutions that can help you promote your program to contractors and recruit them
- Training partners that can help you increase the number of trained and certified technicians in your workforce.

Your local [market assessment](#) revealed the many types of contractors you can partner with, including home performance contractors, HVAC contractors, insulation contractors, remodelers, and others. You also surveyed the range of local training and employment organizations that can help enhance the skills and qualifications of the local home performance workforce.

This handbook provides information and tools to help you:

- Assess potential contractor partners
- Develop strategies for contractor recruitment
- Establish ongoing relationships with contractors

#### Contractor Engagement & Workforce Development

Stages:

1. [Overview](#)
1. [Assess the Market](#)
2. [Set Goals & Objectives](#)
3. [Identify Partners](#)
4. [Make Design Decisions](#)
5. [Develop Implementation Plans](#)
6. [Develop Evaluation Plans](#)
7. [Develop Resources](#)
8. [Deliver Program](#)
9. [Assess & Improve Processes](#)
10. [Communicate Impacts](#)

# Example #1: Step-by-Step (3 of 7)

## Contractor Engagement & Workforce Development – Identify Partners

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Description

Step-by-Step

Tips for Success

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### Step-By-Step

Partnerships can broaden the reach of your relationships with contractors and establish effective partnerships.

▶ **Assess potential contractor participation**

▶ **Develop strategies for contractor recruitment**

▶ **Establish ongoing relationships**

▶ **Engage and recruit workforce**

▶ **Evaluate potential workforce**

▶ **Establish partnership agreements**

#### ▼ **Develop strategies for contractor recruitment**

Recruiting and sustaining contractor participation in programs generally requires ongoing effort. Effective contractor recruitment strategies:

- Are built upon good program designs that minimize administrative requirements, while still maintaining quality standards
- Establish a relationship between the program and the contractor
- Focus on the benefits of the program to the contractor and how they outweigh the costs of participation
- Help the contractor advance to the next stage of participation in the program, such as completing training/orientation or signing a participation agreement.

Your recruitment strategy should include identifying contractors, enticing them to participate, and continually supporting their participation in your program. As discussed when you [learned about contractors in your market](#) , canvas existing energy programs as well as local home performance contractors, HVAC contractors, and trade associations to identify contractors you might encourage to participate in your program. Consult online directories to find certified home performance professionals in your community. For guidance and resources on reaching out to contractors, including online contractor directories, see the [market assessment handbook](#) .

# Example #1: Tips for Success (4 of 7)

## Contractor Engagement & Workforce Development – Identify Partners

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Description

Step-by-Step

Tips for Success

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Topical Resources

### Tips for Success

In recent years, hundreds of communities across the country have joined the Better Buildings Neighborhood Program. The following tips present the top lessons learned.

▶ Design a program that provides training, networking, and mentoring opportunities

▶ Establish collaborative partnerships with local industry and community organizations

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

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

Entering a new market adds risk to contractors' businesses. As several Better Buildings Neighborhood Program partners focused on their efforts to attract contractors, they realized that it would be valuable for them to help contractors enter the home performance market. Many programs took steps to lower or eliminate unnecessary hurdles or barriers to contractors' successful entry into the market. These barriers included long delays to receive payment for the program, paperwork burdens that were sometimes excessive enough to make contractors reluctant to participate, and program expectations that were unclear to contractors. Programs have also used equipment loan programs, subsidized training, and other strategies to lower the upfront costs of entering the home performance market.

To help contractors learn the trade and enter the home performance market, many programs have offered training and mentoring. Taking steps to help contractors enter the home performance market can help you establish a trained workforce of high-quality contractors to support home performance work.

- [Fayette County, Pennsylvania](#) helped [contractors enter the market](#) by providing grants and financing to minimize startup costs, and by giving contractors the opportunity to provide Building Performance Institute (BPI) certification to their technicians. The program partnered with a local private industry council to train technicians to become BPI certified at no cost to students. The partnership program helped new home performance professionals start new businesses, for example, by providing grants and low-interest loans to purchase computer software and professional equipment. Training and certification in the home performance industry provides Fayette County residents with an opportunity for stable and well-paying careers.
- New Hampshire's [Beacon Communities Project](#) sought to reinvigorate the local economy of Berlin, New Hampshire, following the 2006 closure of a pulp mill. The program began working with local community colleges to provide BPI-certified training to develop more qualified home performance professionals. The program supplemented the training with mentoring opportunities for students who completed classroom trainings but needed more experience in the field before being hired by a contractor or starting their own company. In the nearly three years since the program's launch in September 2013, 42 students had been trained through these classes and mentorships. These trained students helped the program offer quality home performance upgrades to homeowners, and the mentorship is helping students become qualified home performance professionals.

# Example #1: Examples (5 of 7)

## Contractor Engagement & Workforce Development – Identify Partners

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Description

Step-by-Step

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### Examples

The following resources are examples from individual residential energy program presentations and reports, and program materials. The U.S. Department of Energy provides these materials.

### Case Studies

[A Business Case for Home Performance Contracting](#)  

**Author:** Pacific Northwest National Laboratory

**Publication Date:** 2012

*This report contains information on the market for home performance contracting; the needs and costs of home performance contracting in the industry; home performance business approaches; and how to reach customers. It also contains detailed profiles of eight successful contractors.*

[Home Performance with ENERGY STAR Contractor Stories](#) 

**Author:** U.S. Department of Energy

*These case studies highlight examples of participating contractors using ENERGY STAR to help homeowners improve their home's energy efficiency.*

[LaborWorks@NeighborWorks of Western Vermont Focus Series](#)

**Author:** U.S. Department of Energy

**Publication Date:** 2012

*LaborWorks @ NeighborWorks is a nonprofit temporary labor pool (NWWVT) to assist professional contractors involved with the Home Energy Assistance Team (HEAT). In the first of this Focus Series, DOE interviews Melinda on why NeighborWorks set up the temporary labor pool, how they manage it, and what programs to consider.*

U.S. DEPARTMENT OF  
**ENERGY**

Energy Efficiency &  
Renewable Energy

**BUILDING TECHNOLOGIES PROGRAM**



**BUILDING AMERICA ENERGY RENOVATIONS**

## A Business Case for Home Performance Contracting

PREPARED BY

Pacific Northwest National Laboratory

October 2012

# Example #1: Toolbox (6 of 7)

## Contractor Engagement & Workforce Development – Identify Partners

Where Am I?


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

### Toolbox

The following resources are available to help design, implement, and evaluate energy efficiency programs. These resources include templates and forms, as well as tools to endorse these materials.

### Templates & Forms

[Efficiency Maine Residential Registered Vendor Agreement Form](#)

**Author:** Efficiency Maine

**Publication Date:** 2014

A short, checklist-style form that contractors complete to verify whether they meet basic program qualifications, and describe other information about their business.

### Tools & Calculators

[Green for All Energy Efficiency Toolkit](#) 

**Author:** Green For All

**Publication Date:** 2012

This practitioner-focused Toolkit for Residential Energy Efficiency helps new, established, and future energy efficiency program managers assist new, established, and future energy efficiency program managers. It is intended as a practical program manager can deploy to implement a variety of energy efficiency programs. It includes summary documents, RFPs, contracts, and other program materials that nationwide have used to create their own efficiency programs.



## Residential Registered Vendor Agreement Form

To be listed as a Registered Vendor on the [Efficiency Maine website](#), please complete this form, sign it and submit it with the appropriate documentation.

**Section 1: Registered Vendor Information.** Please enter information you would like to appear on the website.

Business Name		Phone Number	
Street Address		Fax Number	
City, State, Zip		Business Email	
Contact Name		Website	

**Section 2: Basic Requirements.** Please include the following documentation when submitting agreement form.

<input checked="" type="checkbox"/>	Required Documentation
<input type="checkbox"/>	Code of Conduct: <a href="http://www.efficiencymaine.com/docs/EMCode-of-Conduct.pdf">http://www.efficiencymaine.com/docs/EMCode-of-Conduct.pdf</a>
<input type="checkbox"/>	General Commercial or Professional Liability Insurance (Minimum coverage: \$500,000)
<input type="checkbox"/>	Workers Compensation Insurance (Minimum coverage: \$500,000) <i>Please Note: A Sole Proprietor without employees is not required to have Workers Compensation coverage. Similarly, a Limited Liability Corporation without employees is not required to have Workers Compensation coverage for the owners. If your business is exempt from this requirement, please write "NA" in the checkbox to the left.</i>

**Section 3: Service Offerings and Qualifications.** To have the following services reflected on the [Efficiency Maine Locator](#), please check the rows that apply and **SUBMIT DOCUMENTATION OF APPLICABLE QUALIFICATION(S)**:

<input checked="" type="checkbox"/>	Service Offering	Qualification(s)*
<input type="checkbox"/>	Energy Advisor	<a href="#">Building Performance Institute (BPI) Building Analyst</a> AND <a href="#">Maine Limited Energy Auditor Technician (LEAT) license</a>
<input type="checkbox"/>	Air Sealing and Assessment	<a href="#">Building Performance Institute (BPI) Building Analyst</a> AND <a href="#">Maine Limited Energy Auditor Technician (LEAT) license</a>
<input type="checkbox"/>	Insulation	Insulation installation training
<input type="checkbox"/>	Heat Pumps	<a href="#">Environmental Protection Agency (EPA) Section 608 Refrigerant Handling Certification</a> AND installation training within the last two years by a manufacturer of <a href="#">ENERGY STAR heat pumps</a>
<input type="checkbox"/>	Gas	<a href="#">Maine Fuel Board License</a> (Master or Journeyman, Propane and Natural Gas Technician)
<input type="checkbox"/>	Oil	<a href="#">Maine Fuel Board License</a> (Master or Journeyman, Oil and Solid Fuel Technician)



# Example #1: Topical Resources (7 of 7)

## Contractor Engagement & Workforce Development – Identify Partners

[Where Am I?](#)



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Description

Step-by-Step

Tips for Success

Examples

Toolbox

Topical Resources

### Topical Resources

The following resources provide additional topical information related to this publications, and webcasts. Visit [Examples](#)  for materials from and about

#### Topical Presentations

[Contractor Outreach: Design & Implementation for Residential Retrofit Programs](#)

**Author:** Jared Asch; Efficiency First

**Publication Date:** 2011

*This presentation describes strategies for outreach to energy contractors and incentives.*

[The Contractor-Participation-Inducing Home Performance Programs](#)

**Author:** Mike Rogers; OmStout Consulting; LLC

**Publication Date:** 2012

*Presentation summarizing the important elements needed to induce contractor participation in home performance programs.*

[Five Steps to a Profitable Contractor Base](#)  

**Author:** Courtney Moriarta; SRA International; Inc.; Emily Levin; Vermont Building Performance Institute; Brad Geyer; Fayette County Better Building Department of Labor; Sam Flanery; Building Science Academy

**Publication Date:** 2012

*Presentation on five steps to building a profitable contractor base. The steps include: business administration, certification and credentialing, communicating with contractors, contractor requirements (business vs. trade), and training and sales support.*

## Contractor Outreach

Design and Implementation of Residential Retrofit Programs



# Example #2 (1 of 4)

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

**Better Buildings Residential Program Solution Center**

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

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

**About**

- Handbook Index
- Energy Data Facts
- Glossary

**BROWSE BY:**

- Program Components
- Program Design Phases
- Content Types

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

**Access Program Component Handbooks**

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

**Explore Program Design Phase Resources**

- Strategy Development
- Planning
- Implementation
- Evaluation

**MY FAVORITES**

- Finance Favorites (6 items)
- Marketing & Outreach Favorites (1 item)
- New Favorites Folder

**RECENTLY UPDATED RESOURCES**

- Program Design & Customer Experience – Deliver Program
- Efficiency Maine Downloads and Forms Portal
- New York State Energy Research and Development Authority (NYSERDA) Home Performance with ENERGY STAR Contractor Manual
- EnergySmart Residential Survey (81 KB)
- RePower Bainbridge Upgrade Survey (333 KB)

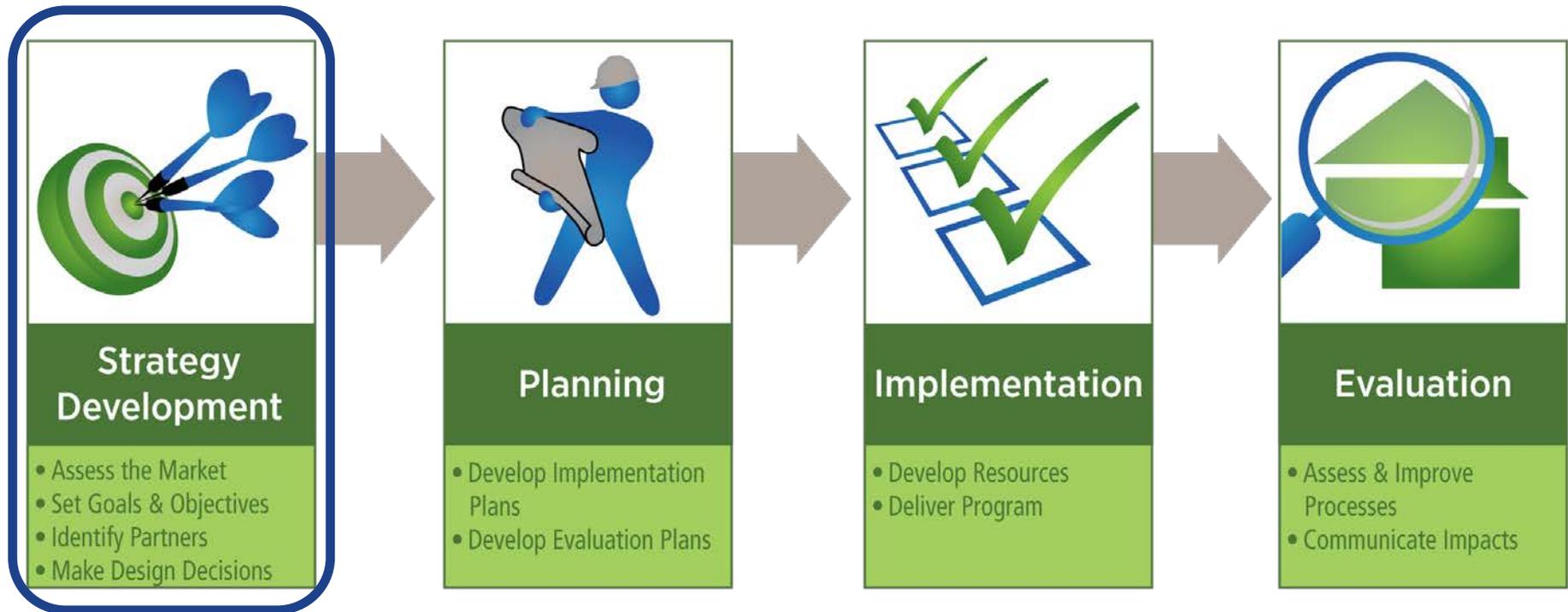
**MOST POPULAR HANDBOOKS**

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

**ACKNOWLEDGEMENTS**

The U.S. Department of Energy thanks the following individuals who conducted an expert review of the Better Buildings Residential Program Solution Center handbooks:

# Example #2: Program Design Phase (2 of 4)



# Example #2: Strategy Development (3 of 4)

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Solution Center Home **BBNP Search**

- About
- Handbook Index
- Energy Data Facts
- Glossary

BROWSE BY:

- Program Components
- Program Design Phases
- Content Types

Enter your keywords

**Search results**

**Financing – Assess the Market**   
*Determine how your target audience currently funds energy efficiency services, to what extent upfront cost is a barrier, and whether improvements to their financing options would increase the uptake of energy efficiency measures.*

**Marketing & Outreach – Assess the Market**   
*Identify and prioritize potential target audiences based on their likely receptivity to your program's services.*

**Contractor Engagement & Workforce Development – Assess the Market**   
*Learn about the capabilities and services of existing contractors and training providers working in your market.*

**Program Design & Customer Experience – Assess the Market**   
*Research and analyze the specific barriers, needs, and opportunities for a residential energy efficiency program in your community.*

**Market Position & Business Model – Assess the Market**   
*Survey existing and potential demand for energy efficiency products and services based on an understanding of policies, housing and energy characteristics, demographics, related initiatives and other market actors.*

**CURRENT SEARCH**

Search found 13 items  
"assess the market"  
[\(-\) Strategy Development](#)

[Clear All Filters](#)

**FILTER BY CONTENT TYPE:**   
[Handbook \(13\)](#)

**FILTER BY PROGRAM COMPONENT:**   
[Market Position & Business Model \(4\)](#)  
[Program Design & Customer Experience \(2\)](#)  
[Marketing & Outreach \(3\)](#)  
[Financing \(2\)](#)  
[Contractor Engagement & Workforce Development \(2\)](#)

**FILTER BY PROGRAM DESIGN PHASE:**   
[\(-\) Strategy Development](#)

# Example #2: Handbooks (4 of 4)

## Market Position & Business Model – Assess the Market

Where Am I?



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

### Description

This handbook will help you assess what kind of energy efficiency activities and actors (e.g., home performance contractors, HVAC contractors, remodelers, retailers, utilities, lenders, and homeowners) currently exist in your community and the level of interest in new energy efficiency efforts. Using this information, this handbook will ultimately help you understand the role your organization can play in filling current or future demand for energy efficiency upgrades in your target market.

You will first learn how to assess the nature of current and potential demand for energy efficiency products and services (e.g., home assessments, energy efficiency upgrades, loans or products to finance upgrades, contractor training) in your community and what factors can influence this demand. You will then be provided with tools for determining how the market is already being served by other organizations and where your organization could provide value in delivering energy efficiency services. To round out your market assessment, you will learn how to identify your organization's strengths, capabilities, and constraints in providing needed products and services. You will also learn how to use that information to determine the next steps for your organization as you undertake a residential energy efficiency program.

A thorough market assessment—giving careful consideration to trends, opportunities, gaps, and barriers—will help you determine if you should enter the market and if so, how to develop a business model that yields economic, environmental, and energy benefits for your community. If your organization decides to enter the energy efficiency market or significantly change its role in the market, you will want to undertake a more detailed market assessment to inform your program design and strategy (see the handbooks below for more information).

Find related information across other program components:

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

### Market Position & Business Model

Stages:

1. [Overview](#)
2. [Assess the Market](#)
3. [Set Goals & Objectives](#)
4. [Identify Partners](#)
5. [Make Design Decisions](#)
6. [Develop Implementation Plans](#)
7. Develop Evaluation Plans
8. Develop Resources
9. Deliver Program
10. Assess & Improve Processes
11. Communicate Impacts

Access Step-by-Step, Tips, and resources

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

Access related information across all program components

# Example #3: Homepage (1 of 3)

How do I develop an RFP to procure the financing services that my customers need?

## Better Buildings Residential Program Solution Center

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

Solution Center Home

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

About

Handbook Index

Energy Data Facts

Glossary

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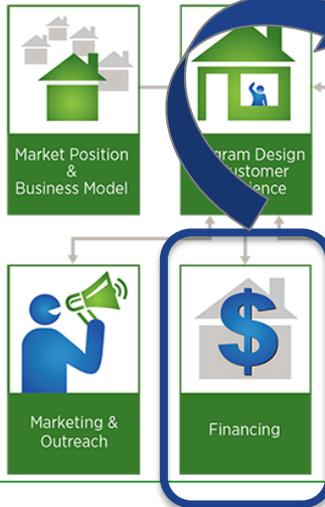
Program Components

Program Design Phases

Content Types

### Explore Program Components

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



SEARCH

RECENTLY UPDATED RESOURCES

## Financing – Overview

Where Am I?

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

### Step-By-Step

The following steps list important activities for successful program administrators to take when implementing Financing activities; however, no two programs are the same, and program administrators need to take into account the unique aspects of their market to create the most effective approach possible. Select each step to access its handbook.

- 1. Assess the Market**  
*Determine how your target audience currently funds energy efficiency services, to what extent upfront cost is a barrier, and whether improvements to their financing options would increase the uptake of energy efficiency measures.*
- 2. Set Goals & Objectives**  
*Establish goals, objectives, and timeframes for your financing activities.*
- 3. Identify Partners**  
*Identify and partner with financial institutions that can provide capital, underwriting, and other functions to enable your customers to access financing.*
- 4. Make Design Decisions**  
*Determine if enhancements to existing financing products or the development of new products are necessary to allow you to achieve your goals and objectives.*
- 5. Develop Implementation Plans**  
*Develop a plan to implement your financing activities, with defined roles for financial institution partners, contractors, customers, and your program.*
- 6. Develop Evaluation Plans**  
*Establish an evaluation plan that will allow you to determine how your financing activities are impacting the market.*
- 7. Develop Resources**  
*Develop the procurement, outreach, and loan support resources required to perform your financing activities.*
- 8. Deliver Program**  
*Launch your financing activities in coordination with other program components.*
- 9. Assess & Improve Processes**  
*Focus on the continuous improvement of your financing activities by tracking and evaluating data, responding to feedback, and modifying strategies when needed.*
- 10. Communicate Impacts**  
*Communicate the results of your financing activities to internal and external partners.*

# Example #3: Handbook (2 of 3)

## Financing – Identify Partners

[Where Am I?](#)

Description

Step-by-Step

Tips for Success

Examples

Toolbox

### Step-By-Step

Developing strong working relationships with your lending partners is key to accessing loans for their home energy upgrades. Best practice is to involve prospective or formal financial partners in the design process. More lenders can occur in parallel with [making financing design](#).

To establish relationships with lenders that will offer consumer friendly financing options, consider the following steps:

▶ Identify lenders

▶ Engage lenders

▶ Determine the process for soliciting proposals

▶ Evaluate proposals

▶ Negotiate and execute the lending agreement

### Key Items to Include in Solicitations for Lending Partners

Key items to consider including in solicitations for lending partners are listed below. Do not develop the items for your solicitation in a vacuum; consultations with at least a few potential lenders will help you develop a solicitation that meets your program's needs and one that lenders understand and can respond to quickly with a proposal.

You will want to include background information about your program as well as requests for specific information from the lender. Make sure to define the prescribed format and content for proposals in response to the solicitation, and the rules, processes, and schedule that will lead to the selection of lenders.

#### Program background for you to include:

- Program summary and goals
- Existing program partners and their roles over the full program development and implementation period, as well as the roles you anticipate for the lending partner
- Available government funding and guidelines (if applicable)
- The target borrower market, the types of energy efficiency projects to be financed, and the economics of the projects
- Clean energy investment and lending volume targets

#### Items to ask lenders to respond to:

- Proposed structure and terms of the energy efficiency loans, including eligible borrowers, eligible projects, expected loan tenors, underwriting guidelines, and proposed loan terms
- Proposed structure of credit enhancements or revolving loan funds, including a risk-sharing formula
- Sources of capital and ability to attract additional sources of funds
- Financial stability of proposed lender and experience with residential energy efficiency loans
- Qualifications of the proposed lender's program manager, personnel, and support staff

### Evaluate proposals

After you issue a solicitation for a lending partner, the next task is to evaluate the proposals and select a lender. Best practice for evaluation of proposals is to develop a scoring sheet that provides members of the evaluation team with a method to rank the qualifications of bidders objectively.

In addition to your organization's standard qualification criteria, you should carefully evaluate the proposal for:

- Financial stability and experience of the responding lender
- Qualifications and adequacy of the proposed program manager and staff
- A detailed description of the functions that will be performed by the lender
- A detailed description of the process and why the process will be acceptable to contractors
- A detailed description of the IT and other systems that will support the process
- A description of the method of compensation
- Reporting capabilities
- Quality control and quality assurance related to loan administration.

# Example #3: Resources (3 of 3)

Description Step-by-Step Tips for Success Examples

## Program Materials

[Sample RFP: City of Independence, Missouri](#) (217 KB)  
**Author:** City of Independence, Missouri  
**Publication Date:** 2010  
*A sample competitive procurement procedure to award lo*

[Sample RFP: Greensboro Energy Efficiency Loan Produ](#)  
**Author:** Better Buildings of Greensboro, North Carolina  
**Publication Date:** 2011  
*A sample RFP from Greensboro, North Carolina, for energ*

Description Step-by-Step Tips for Success Examples

## Templates & Forms

[Financing Program Goals and Design Template Present](#)  
**Author:** U.S. Department of Energy  
**Publication Date:** 2011  
*Template for program administrators to fill out to help det*

[DOE Template Financial Institution RFP](#) (659 KB)  
**Author:** U.S. Department of Energy  
**Publication Date:** 2010  
*A template competitive procurement procedure to award l*

[INSERT GRANTEE LOGO]

[NOTE: Numbers and any fictional names are used for illustrative purposes]

**REQUEST for PROPOSALS (RFP)  
for Residential Energy Efficiency Loan Facilities:**  
[ ] City

**Proposal Due Date:** September X, 2010 at XX:00 a.m.

**Send Proposals to:** City of [ ]  
Office of Sustainability  
789 Main St  
[City], [State] 19890

If you have questions about this RFP, please contact:

**Lead Contact for RFP  
Questions & Communications:** Cary S. Ford, Projects Manager  
800-123-4567, [CFord@City.gov](mailto:CFord@City.gov)

**1. Request for Proposals ("RFP")**

Based on a grant from the [ ] State Energy Fund ("SEF"), the City of [ ] (the "City") is seeking a financial institution (FI) partner to participate in its city-wide energy efficiency initiative ("Program"). We are requesting proposals from FIs to provide the following services:

- assist in final structuring of the energy efficiency loan program, in collaboration with the City and its financial advisor, Energy Finance Corp. ("EFC");
- originate and provide energy efficiency ("EE") loans ("Loans") to residential energy users (and, possibly in the future, small commercial and non-profit energy users);
- manage a loan loss reserve fund ("LRF"), or other credit enhancement mechanism (see Section 5), funding for which shall be provided by the City to enhance the credit structure of the Loan portfolio;
- provide related Loan administration services, e.g., billing and collections; and
- provide reports on the Loan portfolio and LRF.

# Example #4 (1 of 2)

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

**BBNP Search**

Enter your keywords  
quality assurance

Search

**Search results**

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

---

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

---

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

---

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

**CURRENT SEARCH**

Search found 17 items  
quality assurance [Clear All Filters](#)

**FILTER BY CONTENT TYPE:**

- [Handbook \(5\)](#)
- [Tips for Success \(5\)](#)
- [Program Materials \(2\)](#)
- [Publications \(2\)](#)
- [Topical Presentations \(2\)](#)
- [Webcast \(1\)](#)

**FILTER BY PROGRAM COMPONENT:**

- [Program Design & Customer Experience \(4\)](#)
- [Evaluation & Data Collection \(3\)](#)
- [Financing \(3\)](#)
- [Contractor Engagement & Workforce Development \(10\)](#)

**FILTER BY PROGRAM DESIGN PHASE:**

- [Overview \(4\)](#)
- [Strategy Development \(9\)](#)
- [Planning \(7\)](#)
- [Implementation \(8\)](#)
- [Evaluation \(6\)](#)

**FILTER BY STATE OR TERRITORY:**

Use filters to further refine results

# Example #4: Filter for Handbooks (2 of 2)

## BBNP Search

Enter your keywords



### Search results

#### Contractor Engagement & Workforce Development – Overview

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

## DOE Technical Assistance Program

U.S. DEPARTMENT OF **ENERGY** Energy Efficiency & Renewable Energy



## Quality Assurance for Residential Retrofit Programs

October 26, 2010

Jim Grevatt

Vermont Energy Investment Corporation  
DOE Technical Assistance Program  
Team 4 – Program & Project Development & Implementation



## Quality Assurance Best Practices

### Quality Assurance Best Practices: Home Performance with ENERGY STAR Programs

While the EPA's Home Performance with ENERGY STAR is not the only whole house retrofit program in operation, it offers a set of standard guidelines and best practices for Quality Assurance (QA) that should be utilized in starting any new or updating existing home retrofit programs.

In order to sponsor a Home Performance with ENERGY STAR program, organizations must submit an implementation plan which includes Quality Assurance protocols. In order to meet ENERGY STAR requirements, QA plans must explain how the program will ensure participating contractors will meet program standards. QA plans must explain:

- **Contractor company and staff qualification requirements** intended to ensure that qualified building scientists are assessing the home and are capable of protecting the brand promise of ENERGY STAR. These capabilities include:

Contractor staff understand how to represent the program and their participation in it

Contractor staff understand the energy efficiency strategies applicable for residential retrofits

Contractor staff can protect the health and safety of occupants when installing energy efficiency measures

Contractor companies have proper licenses, insurance, etc.

Contractor companies sign participation agreements that outline proper conduct and program requirements

**Reporting process** that requires participating contractors to report jobs that are promoted to owners and performed under the HPwES logo.

Some – but not all – programs want to pre-approve jobs prior to commencement. However, this pre-approval tends to slow down jobs and can potentially reduce the audit-to-retrofit conversion rate.

Compliance with program requirements and industry standards (see below) **audit review process** that ensures program compliance and provides for follow-up contractor when necessary

Reporting of jobs (aka "file checks") serve multiple purposes:

- Rebate processing (i.e., eligibility of installed measures)
- Sufficient data to have some reasonable assurance that measures will save energy
- Confirmation that health & safety measures were being followed
  - Combustion safety – draft test, Combustion Appliance Zone (CAZ) tests
  - Ventilation – ASHRAE compliance
  - Lead safe practices
  - Other (moisture, asbestos, etc.)
- Data that could be used to inform an on-site QA visit
- Opportunity to mentor contractors

# Solution Center Home Page

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Browse by Design Phases

Browse by Content Types

**Better Buildings Residential Program Solution Center**

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Solution Center Home

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BROWSE BY:

Program Components

Program Design Phases

Content Types

Center is a repository of examples, efficiency programs. It is intended to help generate, and evaluate their programs.

Handbooks

Market Position & Business Model

Program Design & Customer Experience

Evaluation & Data Collection

Marketing & Outreach

Financing

Contractor Engagement & Workforce Development

Explore Program Design Phase Resources

Strategy Development

Planning

Implementation

Evaluation

MY FAVORITES

Finance Favorites  
6 items

Marketing & Outreach Favorites  
1 items

New Favorites Folder

RECENTLY UPDATED RESOURCES

Program Design & Customer Experience – Deliver Program

Efficiency Maine Downloads and Forms Portal

New York State Energy Research and Development Authority (NYSERDA) Home Performance with ENERGY STAR Contractor Manual

EnergySmart Residential Survey (81 KB)

RePower Bainbridge Upgrade Survey (333 KB)

MOST POPULAR HANDBOOKS

Market Position & Business Model – Overview

Marketing & Outreach – Overview

Financing – Overview

Program Design & Customer Experience – Overview

Market Position & Business Model – Assess the Market

ACKNOWLEDGEMENTS

The U.S. Department of Energy thanks the following individuals who conducted an expert review of the Better Buildings Residential Program Solution Center handbooks:

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**Better Buildings Residential Program  
Solution Center  
Next Steps**

# Summer 2014: Peer Review & Beta Use

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

# Access the Solution Center

The screenshot shows the homepage of the Better Buildings Residential Program Solution Center. At the top, there is a navigation bar with "My Favorites", "Account", and "Log Out" links, and a search box. The main content area is divided into several sections:

- Solution Center Home:** A brief description of the center as a repository for residential energy efficiency programs.
- Access Program Component Handbooks:** A central diagram showing six interconnected handbooks: Market Position & Business Model, Program Design & Customer Experience, Evaluation & Data Collection, Marketing & Outreach, Financing, and Contractor Engagement & Workforce Development.
- Explore Program Design Phase Resources:** A horizontal flow of four icons representing the design phases: Strategy Development, Planning, Implementation, and Evaluation.
- MY FAVORITES:** A section with "Finance Favorites" (6 items), "Marketing & Outreach Favorites" (1 item), and a "New Favorites Folder" button.
- RECENTLY UPDATED RESOURCES:** A list of links including "Program Design & Customer Experience - Deliver Program", "Efficiency Maine Downloads and Forms Portal", "New York State Energy Research and Development Authority (NYSERDA) Home Performance with ENERGY STAR Contractor Manual", "EnergySmart Residential Survey (81 KB)", and "RePower Bainbridge Upgrade Survey (333 KB)".
- MOST POPULAR HANDBOOKS:** A list of links for "Market Position & Business Model - Overview", "Marketing & Outreach - Overview", "Financing - Overview", "Program Design & Customer Experience - Overview", and "Market Position & Business Model - Assess the Market".
- ACKNOWLEDGEMENTS:** A section thanking individuals who conducted an expert review of the handbooks.

## Access information:

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

Email comments about the Solution Center to:

[BBRPSolutionCenter@erg.com](mailto:BBRPSolutionCenter@erg.com)

# Appendix

# Handbook Index

Organized by program component and design phase

- Overview Handbooks
- Stage Handbooks

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

# Energy Data Facts

- National Residential Energy Facts
- Consumer Home Energy Upgrade Facts
- Sources for More Residential Energy Data

## Better Buildings Residential Program Solution Center

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[Solution Center Home](#)

### Energy Data Facts

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[Energy Data Facts](#)

[Glossary](#)

**BROWSE BY:**

▶ [Program Components](#)

▶ [Program Design Phases](#)

▶ [Content Types](#)

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

### National Residential Energy Facts

1. What percentage of total U.S. energy consumption is made up of consumption from the residential sector?

- Households account for 21.4% of total energy consumption in the United States.  
Calculations based on data from: [Annual Energy Outlook 2014 Early Release, Table 2: Energy Consumption by Sector and Source](#), U.S. Department of Energy, 2014.

2. What does the average U.S. household spend per year on its energy bills?

- The average household spends \$2,024 on residential energy annually, including heating, cooling, water heating, appliances, lighting, and electronics.  
Source: [Residential Energy Consumption Survey 2009, Table CE1.1: Summary totals and intensities, U.S. homes](#), U.S. Department of Energy, 2012.

# Glossary

## Glossary

### Note

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

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

# Content: Starting with Better Buildings Neighborhood Program



# Six Program Components



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



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



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

# Program Components (cont.)



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



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



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

# For Your Consideration...

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

# Access Handbooks by Program Component or Program Design Phase

U.S. DEPARTMENT OF ENERGY Energy Efficiency & Renewable Energy

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## Better Buildings Residential Program Solution Center

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

**Solution Center Home**

- About
- Handbook Index
- Energy Data Facts
- Glossary
- BROWSE BY:**
  - Program Components
  - Program Design Phases**
  - Content Types

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

### Explore Program Components

Information in the Residential Program Solution Center is organized around the primary functions typically overseen by a residential energy efficiency program administrator, termed "components" of a program. The components are listed below.

### Look Across Program Design Phases

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

**MY FAVORITES**

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

**RECENTLY UPDATED RESOURCES**

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

**MOST POPULAR HANDBOOKS**

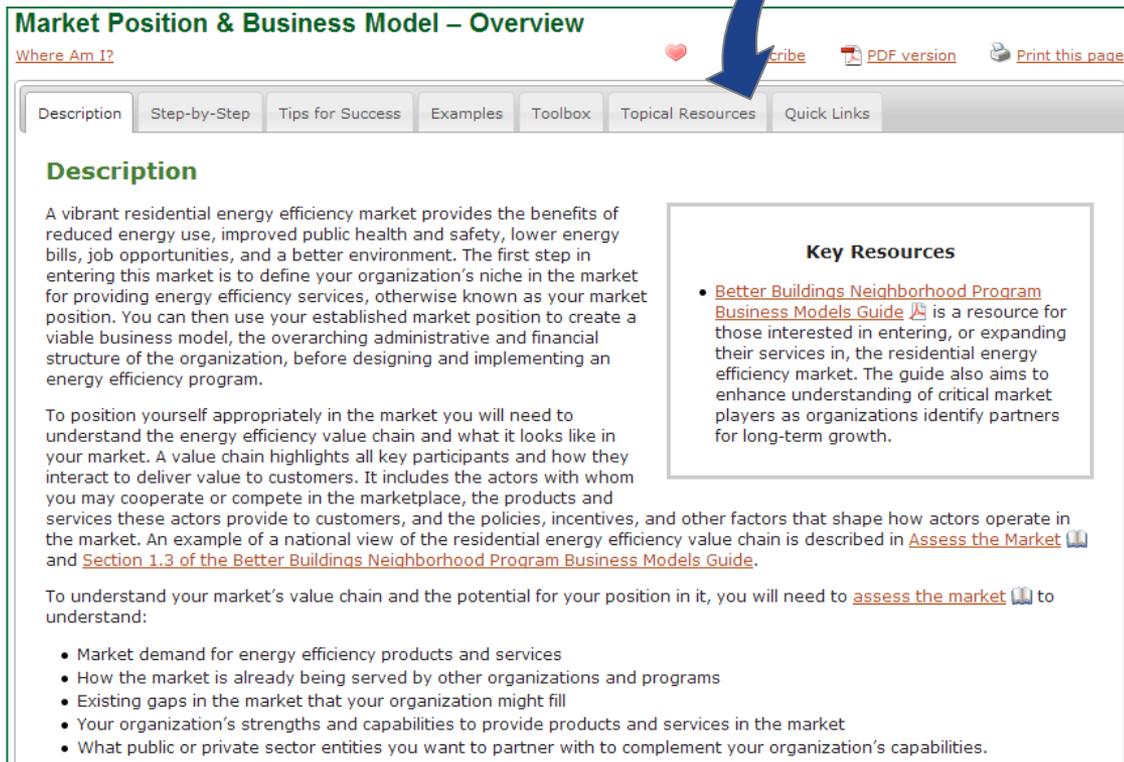
- Marketing & Outreach – Overview
- Market Position & Business Model – Overview
- Financing – Overview
- Program Design & Customer Experience – Overview
- Financing – Set Goals & Objectives

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

Access handbooks through navigation bar or central graphics

# Access Handbooks by Program Component

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



### Market Position & Business Model – Overview

Where Am I? [Subscribe](#) [PDF version](#) [Print this page](#)

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

#### Description

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

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

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

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

#### Key Resources

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



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- Market Position & Business Model
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  - Set Goals & Objectives
  - Identify Partners
  - Make Design Decisions
  - Develop Implementation Plans
  - Develop Evaluation Plans
  - Develop Resources
  - Assess & Improve Processes
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- Program Design & Customer Experience
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  - Identify Partners
  - Make Design Decisions
  - Develop Implementation Plans
  - Develop Evaluation Plans
  - Develop Resources
  - Deliver Program
  - Assess & Improve Processes
  - Communicate Impacts
- Contractor Engagement & Workforce Development

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- Program Design & Customer Experience
- Contractor Engagement & Workforce Development
- Marketing & Outreach
- Financing
- Evaluation & Data Collection

**Select Resources by Program Design Phase**

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- Implementation
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# Future Feature: Customized Content

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**FIND YOUR TOPIC BY:**  
Building Components  
Guides A-Z  
ENERGY STAR

**FIND RESOURCES:**  
References and Resources  
CAD Files  
Image Gallery  
Case Studies

**FIND PUBLICATIONS:**  
Building Science Publications

## Heavy Membranes at Valley and Roof Deck Penetrations

[Feedback](#) [Print this page](#) [PDF version](#)

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

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

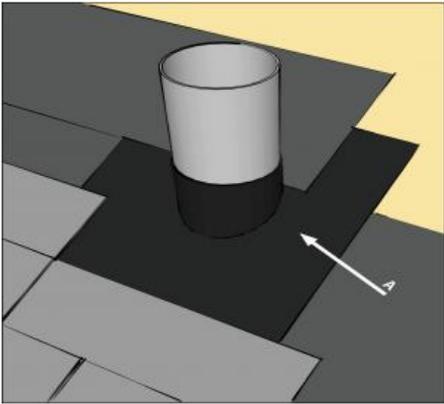
### Scope

#### Water Managed Roof Assembly

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

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

**ENERGY STAR Notes:**  
Not required in dry climates as shown in 2009 IECC Figure 301.1 and Table 301.1.



Content is specific to you based on information you provided

# Peer Review

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

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

## About

In recent years, hundreds of community energy programs such as the [Better Buildings](#)

The Better Buildings Residential Program has collected from the experience of these programs to evaluate residential energy efficiency p

### Content

### Organization

### Acknowledgments

#### Content

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

program achievements as well as opportunities for making program improvements.

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

#### Acknowledgments

The U.S. Department of Energy thanks the following individuals who conducted an expert review of the Better Buildings Residential Program Solution Center handbooks:

- Lauren Boitel, EnergyFit Nevada
- Kyle Diesner, City of Portland Bureau of Planning and Sustainability
- David Haeg, Elevate Energy
- Laura Parsons, California Center for Sustainable Energy
- Kristin Riott, Bridging The Gap
- Erick Shambarger, Milwaukee Office of Environmental Sustainability & Me<sup>2</sup> program
- Suzanne Shelton, Shelton Group

#### Note

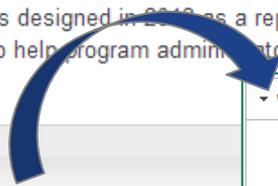
This version of the handbook does not include all content, and provides a preview of the content.

The Residential Program Solution Center will be updated back often as we receive feedback.

# How to Use This Tool (2 of 2)

## How to Use This Tool

The Better Buildings Residential Program Solution Center was designed in 2012 as a repository for key lessons, resources, and knowledge collected from the experience of these efforts. It is intended to help program administrators and their partners plan, implement, manage, and evaluate residential energy efficiency programs.



▶ **What You Will Find**

▶ **Find What You Need**

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### ▼ What You Will Find

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

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

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

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

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Browse by Program Components

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## Look Across Program Design Phases

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



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**BROWSE BY:**

- Program Components
- Program Design Phases
- Content Types

**Browse by Program Components**

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

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

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- Finance Favorites (6 items)
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- Contractor Engagement & Workforce Development – Set Goals & Objectives
- Better Buildings Program Element Flowcharts
- Options for Raising Capital (and Leveraging Public Funds) for Residential Energy Loan Programs
- Trusted Partners: Everyday Energy Efficiency Across the South
- State Fact Sheets on Household Energy Use

**MOST POPULAR HANDBOOKS**

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

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▶ Program Design Phases

▼ Content Types

All Content

Program Material & Examples

Topical Material

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Items per page

100 ▼

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[\\$20 Billion Bonanza: Best Practice Lessons for the Southwest](#) 

**Author:** Southwest Energy Efficiency Project

**Publication Date:** 2012

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

[10 New Year's Resolutions to Keep the Customers Coming](#)

**Author:** Home Energy Magazine

**Publication Date:** 2013

*This article provides 10 tips home energy contractors can use to update their marketing outreach and improve their customer service.*

[20-Unit Windham Apartment Building Gains Energy Savings and Comfort](#)

**Author:** Efficiency Maine

**Publication Date:** 2013

*This case study highlights a 20-unit apartment building that gained energy savings and comfort through Efficiency Maine.*

[A Business Case for Home Performance Contracting](#) 

**Author:** Pacific Northwest National Laboratory

**Publication Date:** 2012

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

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[Marketing & Outreach \(196\)](#)  
[Financing \(149\)](#)  
[Contractor Engagement & Workforce Development \(103\)](#)

## FILTER BY PROGRAM DESIGN PHASE:

[Overview \(56\)](#)  
[Strategy Development \(308\)](#)  
[Planning \(284\)](#)  
[Implementation \(325\)](#)

# Solution Center Home Page

## Better Buildings Residential Program Solution Center

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Browse by Content Types

Browse by Design Phases

Browse by Program Components

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- Handbook Index
- Energy Data Facts
- Glossary
- BROWSE BY:
  - Program Components
  - Program Design Phases
  - Content Types

### Explore Program Components

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



### Look Across Program Design Phases

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



### MY FAVORITES

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

### RECENTLY UPDATED RESOURCES

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

### MOST POPULAR HANDBOOKS

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

My Favorites

Recent Content

Popular Handbooks



# Solution Center Home Page

The screenshot shows the homepage of the Better Buildings Residential Program Solution Center. The page includes a navigation menu on the left, a search bar at the top right, and several content sections. Callout boxes point to the following features:

- About**: Points to the 'About' link in the navigation menu.
- Handbook Index**: Points to the 'Handbook Index' link in the navigation menu.
- Energy Data Facts**: Points to the 'Energy Data Facts' link in the navigation menu.
- Glossary**: Points to the 'Glossary' link in the navigation menu.
- Browse by Content Types**: Points to the 'Content Types' link in the navigation menu.
- Browse by Design Phases**: Points to the 'Browse by Program Components' section.
- Search**: Points to the search bar at the top right.
- My Favorites**: Points to the 'MY FAVORITES' section.
- Recent Content**: Points to the 'RECENTLY UPDATED RESOURCES' section.
- Popular Handbooks**: Points to the 'MOST POPULAR HANDBOOKS' section.

## Browse by Program Components



### Look Across Program Design Phases

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



# Solution Center Home Page

U.S. DEPARTMENT OF ENERGY | Energy Efficiency & Renewable Energy

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Browse by Content Types

Browse by Design Phases

Browse by Program Components

EERE » BTO » Better Buildings Neighborhood Program

Solution Center Home

The Better Buildings Residential Program Solution Center provides a comprehensive set of lessons, resources, and tools intended to help program administrators and participants evaluate their program performance.

**Explore Program Components**

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- Trusted Partners: Everyday Energy Efficiency Across the South
- State Fact Sheets on Household Energy Use

**MOST POPULAR HANDBOOKS**

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

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Popular Handbooks

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# Solution Center Home Page

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BROWSE BY:

- Program Components
- Program Design Phases
- Content Types

**Browse by Program Components**

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

**Look Across Program Design Phases**

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- Strategy Development
- Planning
- Implementation
- Evaluation

**MY FAVORITES**

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**MOST POPULAR HANDBOOKS**

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

**Better Buildings**  
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Browse by Content Types

Browse by Design Phases

# Handbooks – Create a PDF

## Program Design & Customer Experience – Make Design Decisions

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Program Design & Customer Experience – Make Design Decisions.pdf - Adobe Reader

File Edit View Window Help

1 / 24 91% Tools Sign Comment

<https://bbnp.pnnl.gov/handbooks/program-design-customer-experience-%E2%80%93-make-design-decisions>

### Program Design & Customer Experience – Make Design Decisions

#### Description

Successful energy efficiency programs address the specific needs, opportunities, and challenges of their local markets. Programs that are most likely to succeed aren't those that pick program elements from a menu of options. Instead, you should develop a coordinated strategy of related elements that are designed to overcome multiple market barriers to ensure the greatest fit of your program to your local context. To make sure that your program is tailored to your specific market, your design should be based on:

- Your [market assessment](#), which identified needs and opportunities in the market. Your program will be designed to seize these opportunities and overcome the barriers to adopting energy efficiency that you've identified.
- Your [program goals and objectives](#), which define what your program seeks to achieve.
- Your [partners](#) who will help you deliver the program, with particular understanding of local contractors and their capacity and, in many cases, local utilities.

If your organization has a detailed [business plan](#) for providing energy efficiency services, it will be a key guide for program design. If your organization does not have a business plan, you will make many of these types of planning decisions as you develop your program design. A business plan typically describes your organization's:

- *Market position* in relation to other organizations' energy efficiency services and your organization's strengths and capabilities
- *Services* your organization will provide directly or through partners
- *Target markets* and how your organization will reach them
- *Assets and infrastructure* needed by your organization in order for it to play your desired role in the market
- *Financial model*, including your organization's funding and revenue strategy and a realistic assessment of the costs and effort needed to participate in the market
- *Governance structure*, describing who will manage various aspects of your organization and make decisions about program design and implementation.

#### Program Design & Customer Experience

Stages:

1. [Assess the Market](#)
2. [Set Goals & Objectives](#)
3. [Identify Partners](#)
4. **Make Design Decisions**
5. [Develop Implementation Plans](#)
6. [Develop Evaluation Plans](#)
7. Develop Resources
8. Deliver Program
9. Assess & Improve Processes
10. [Communicate Impacts](#)

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# Handbooks – Print this page

## Program Design & Customer Experience – Make Design Decisions

Where Am I?



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Description

### Des

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Information in your business plan about your organization's services, target markets, revenue, and costs provides a good foundation for program design. The program design process will help you specifically define the markets, products, and services on which your organization's residential energy efficiency program will focus. Your business plan will also help you be realistic about your organization's budget for the program as you decide on your program's scope and offerings.

5/14/2014 Program Design & Customer Experience – Make Design Decisions  
<https://hbnp.pnnl.gov/handbooks/program-design-customer-experience-%E2%80%99-make-design-decisions>

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### Program Design & Customer Experience

#### Stages:

1. **Overview**
1. **Assess the Market**
2. **Set Goals & Objectives**
3. **Identify Partners**
4. **Make Design Decisions**
5. **Develop Implementation Plans**
6. **Develop Evaluation Plans**
7. **Develop Resources**
8. **Deliver Program**
9. **Assess & Improve Processes**
10. **Communicate Impacts**

### Design & Customer

- Assess the Market
- Set Goals & Objectives
- Identify Partners
- Make Design Decisions
- Develop Implementation Plans
- Develop Evaluation Plans
- Develop Resources
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- Assess & Improve Processes
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# Access Handbooks by Program Design Phase

Select a design phase to see all associated handbooks across program components.



**Better Buildings Residential Program Solution Center**

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**Handbooks**

**Contractor Engagement & Workforce Development – Deliver Program**  
Implement contractor coordination and workforce recruitment and training in concert with other program components

**Contractor Engagement & Workforce Development – Develop Resources**  
Develop workforce and contractor engagement procedures, forms, and materials

**Evaluation & Data Collection – Conduct Evaluation**  
Manage third-party impact and process evaluation activities by coordinating with evaluators, transferring data, and overseeing evaluation deliverables.

**Evaluation & Data Collection – Develop Resources**  
Conduct and manage evaluation and data collection activities

**Financing – Deliver Program**  
Launch your financing activities in coordination with other program components.

**CURRENT SEARCH**

**Search found 8 items**  
(-) Implementation

**FILTER BY PROGRAM COMPONENT:**

- Market Position & Business Model (1)
- Evaluation & Data Collection (2)
- Marketing & Outreach (2)
- Financing (1)
- Contractor Engagement & Workforce Development (2)

**FILTER BY PROGRAM DESIGN PHASE:**

- (-) Implementation

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

### Market Position & Business Model – Overview

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

#### Step-By-Step

The following steps list important activities for successful program administrators to take when implementing Market Position & Business Model activities; however, no two programs are the same, and program administrators need to take into account the unique aspects of their market to create the most effective approach possible. Select each step to access the handbook.

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

# My Favorites – Adding Resources

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

## Examples

The following resources are examples from individual residential energy efficiency programs, program presentations and reports, and program materials. The U.S. Department of Energy c

## Case Studies

[Spotlight on Austin, Texas: Best Offer Ever Produces Upgrades in Record Time](#)  (555 KB) 

**Author:** U.S. Department of Energy  
**Publication Date:** 2011

*This case study provides examples of lessons learned through the implementation and monitoring of Austin Energy's Best Offer Ever promotion. The promotional offer generated a record number of home upgrades in just six months. Due to thoughtful planning, Austin Energy and its contractors were able to keep up with this temporary surge in requests for energy evaluations, inspections, improvements, and loan origination, while learning valuable lessons along the way.*

[Austin's Home Performance with ENERGY STAR Program: Making a Compelling Offer to a Financial Institution Partner](#)  (369 KB) 

**Author:** Lawrence Berkeley National Laboratory  
**Publication Date:** 2011

*This policy brief describes how Austin Energy's Home Performance with ENERGY STAR program worked with its lending partner, Velocity Credit, to originate almost 1,800 loans, totaling approximately \$12.5 million.*

[Program Design Case Study: Boulder, Colorado](#)  (247 KB) 

**Author:** Home Performance Resource Center  
**Publication Date:** 2010

*This case study focuses on two components of the ClimateSmart initiative in Boulder, Colorado: the ClimateSmart Loan Program (CSLP) and the ClimateSmart Residential Energy Action Program (REAP). Includes best practices recommendations for the design and implementation of successful home energy upgrade programs, focusing on financing and incentives, marketing, workforce development, and business models.*

Add or remove this item in your favorites folders.

-  Finance Favorites  
6 items
-  Other Favorites  
1 items

# Manage My Favorites

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BROWSE BY:  
Program Components  
Program Design Phases  
Content Types

## Finance Favorites

### Handbooks

### Financing

[Deliver Program](#) 04/04/2014  
*Launch your financing activities in coordination with other program components.*

[Develop Implementation Plans](#) 04/04/2014  
*Develop a plan to implement your financing activities, with defined roles for financial institution partners, contractors, customers, and your program.*

[Overview](#) 04/04/2014  
*Ensure that your program's customers will have access to affordable financing, so they can pay for the services you offer.*

### Resources

#### Webcast

Finance Planning 04/04/2014 [Presentation](#), [Media](#), [Transcript](#)  
Author: U.S. Department of Energy  
Publication Date: 2010  
*This webcast discussed the broad spectrum of needs financing mechanisms must address within integrated energy efficiency programs.*

#### Case Studies

[Austin's Home Performance with ENERGY STAR Program: Making a Compelling Offer to a Financial Institution Partner](#) 04/04/2014  
Author: Lawrence Berkeley National Laboratory  
Publication Date: 2011  
*This policy brief describes how Austin Energy's Home Performance with ENERGY STAR program worked with its lending partner, Velocity Credit, to originate almost 1,800 loans, totaling approximately \$12.5 million.*

## MY FAVORITES

- Finance Favorites  
6 items
- Other Favorites  
1 items
- + New Favorites Folder

All of your "My Favorites" folders are shown here

The largest folder opens in the center of the page

**Better Buildings Residential Program  
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# **Navigation & Functionality**

# Solution Center Home Page

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BROWSE BY:

- Program Components
- Program Design Phases
- Content Types

**Browse by Program Components**

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

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

**MY FAVORITES**

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

**RECENTLY UPDATED RESOURCES**

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

**MOST POPULAR HANDBOOKS**

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

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Browse by Content Types

Browse by Design Phases

## Look Across Program Design Phases

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# Search Content

The screenshot shows a search interface for BBNP. At the top, a search bar contains the text "program funding" and a green "SEARCH" button. A blue arrow points from this search bar to the main search results page. The main page is titled "BBNP Search" and includes a search input field with "program funding" entered and a "Search" button. Below the search bar, the text "Search results" is displayed. The results are listed as follows:

- [Think broadly about potential funding sources and program administration partners](#)
- Clean Energy Program Funding: EPA Local Climate and Webcast Series**  
[Presentation](#)  
Three-part webinar series. Part I discusses how to design and implement funding programs, line up partners, and gain support for clean energy programs through both conventional and non-conventional methods. Part II discusses how to locate available sources of funding. Part III explains how to leverage existing funds and make clean energy investments more affordable for clean energy program audiences.
- [Expanding North Carolina Energy Efficiency and Renewable Lending Programs: Market Snapshot](#)
- This market assessment evaluates lending options for funding energy efficiency upgrades in North Carolina.
- [What's Working in Residential Energy Efficiency Upgrade Programs: Greater Cincinnati Energy Alliance](#)
- Presentation on the organization, funding structure, and market focus of the Greater Cincinnati Energy Alliance.
- Part I: Getting Started: Answering Big Picture Funding Questions  
[Presentation 1](#), [Presentation 2](#), [Presentation 3](#), [Presentation 4](#), [Transcript](#)
- This webcast (Part I of a three-part series) covers the big picture questions that local governments should consider for funding clean energy programs. What resources are available? What are the program priorities? How can these programs pay for themselves? What funding is available?

On the right side of the search results page, there are filter sections:

- CURRENT SEARCH**  
Search found 12 items  
program funding  
[Clear All Filters](#)
- FILTER BY CONTENT TYPE:**
  - [Handbook \(5\)](#)
  - [Program Presentations & Reports \(2\)](#)
  - [Publications \(2\)](#)
  - [Webcast \(2\)](#)
  - [Tips for Success \(1\)](#)
- FILTER BY PROGRAM COMPONENT:**
  - [Market Position & Business Model \(7\)](#)
  - [Program Design & Customer Experience \(2\)](#)
  - [Financing \(4\)](#)
- FILTER BY PROGRAM DESIGN PHASE:**
  - [Overview \(2\)](#)
  - [Strategy Development \(9\)](#)
  - [Planning \(6\)](#)
  - [Implementation \(4\)](#)
  - [Evaluation \(1\)](#)
- FILTER BY STATE OR TERRITORY:**
  - [North Carolina \(1\)](#)
  - [Not Assigned \(1\)](#)

- Based on keywords, titles, and filter meta data
- Results include Handbooks and all other content types
- Use filters to refine results

# Filters Available

All Content Types can be browsed or searched

Search filters include:

- Content Type
- Program Component
- Program Design Phase
- State or Territory
- Customer Income
- Neighborhood Type
- Building Sector

Coming Soon:

- Program Name

The screenshot shows a vertical list of filter categories, each with a dropdown arrow. The categories and their sub-items are:

- FILTER BY CONTENT TYPE:**
  - [Publications \(127\)](#)
  - [Program Presentations & Reports \(107\)](#)
  - [Program Materials \(94\)](#)
  - [Case Studies \(68\)](#)
  - [Webcast \(62\)](#)
  - [Templates & Forms \(55\)](#)
  - [Handbook \(51\)](#)
  - [Tips for Success \(51\)](#)
  - [Topical Presentations \(48\)](#)
  - [Tools & Calculators \(35\)](#)
- FILTER BY PROGRAM COMPONENT:**
- FILTER BY PROGRAM DESIGN PHASE:**
- FILTER BY STATE OR TERRITORY:**
- FILTER BY CUSTOMER INCOME:**
  - [Not Assigned \(6\)](#)
  - [Low \(1\)](#)
  - [Moderate \(1\)](#)
- FILTER BY NEIGHBORHOOD TYPE:**
  - [Rural \(22\)](#)
  - [Urban \(21\)](#)
  - [Suburban \(15\)](#)
  - [Not Assigned \(7\)](#)
- FILTER BY BUILDING SECTOR:**
  - [Single Family \(102\)](#)
  - [Multifamily \(88\)](#)
  - [Not Assigned \(6\)](#)

**Better Buildings Residential Program  
Solution Center**

**Customize Your  
Experience**

# Register to Customize Content

- Registered users can:
  - Subscribe to email updates about Solution Center content.
    - Look for “Subscriptions” tab in your user account.
  - Save materials in customizable “My Favorites” folders.
    - Look for “My Favorites” icon. ❤️

The screenshot shows the 'Better Buildings Residential' website interface. A blue callout box with white text says 'Click “Register” to create your user account'. The website header includes the U.S. Department of Energy logo and navigation links. The main content area features a 'Solution Center Home' section with a description of the center's purpose. Below this is a 'Browse By' section with categories like 'Program Components', 'Program Design Phases', and 'Content Types'. A central diagram titled 'Explore Program Components' shows a flow from 'Market Position & Business Model' to 'Program Design & Customer Experience' to 'Evaluation & Data Collection'. Below this, another diagram titled 'Look Across Program Design Phases' shows four interconnected boxes: 'Marketing & Outreach', 'Financing', 'Contractor Engagement & Workforce Development', and 'Evaluation & Data Collection'. The right sidebar contains sections for 'RECENTLY UPDATED RESOURCES' and 'MOST POPULAR HANDBOOKS' with various links.

**Click “Register” to create your user account**

**Explore Program Components**

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# Subscribe to Email Updates

Look for the “Subscribe” link at the top of each handbook.

**Evaluation & Data Collection – Overview**

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

## Description

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

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

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

### Key Resources

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

# My Favorites – Adding Handbooks

**Better Buildings Residential Program Solution Center**

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

Solution Center Home **Financing – Deliver Program**  
Where Am I?

About Handbook Index Energy Data Facts Glossary

BROWSE BY:  
Program Components  
Program Design Phases  
Content Types

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

### Description

Everything you have prepared so far has put you in a position to implement your financing activities. To prepare yourself for program delivery, you should have completed the following steps:

- Determined the need for home energy loans in your community based on a [market assessment](#) , and [established goals and objectives](#)  to guide your financing activities.
- Identified and engaged [lending partners](#) .
- [Designed your financing activities](#) , which are likely focused on sponsoring an existing financial product or program or providing capital to lenders, either to lend directly or as a credit enhancement.
- Developed an [implementation plan](#)  that identifies workflows and defines the roles for your program, lenders, and contractors, as well as an [evaluation plan and metrics](#)  to help you track and measure program progress.

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Add or remove this item in your favorites folders.

- Finance Favorites  
6 items
- + Marketing & Outreach Materials  
4 items
- + [New Favorites Folder](#)

**Click the heart to add content to My Favorites**

### Financing

Stages:

- [Overview](#) 
- 1. [Assess the Market](#) 
- 2. [Set Goals & Objectives](#) 
- 3. [Identify Partners](#) 
- 4. [Make Design Decisions](#) 
- 5. [Develop Implementation Plans](#) 
- 6. [Develop Evaluation Plans](#) 
- 7. [Develop Resources](#)
- 8. [Assess & Improve Processes](#) 
- 9. [Communicate Impacts](#) 

# Example #3: Search (1 of 4)

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

**Better Buildings Residential Program Solution Center**

My Favorites | Account | Log Out

RFP

EERE » BTO » [Better Buildings Neighborhood Program](#) » [Solution Center Home](#) »

Solution Center Home **BBNP Search**

About

Handbook Index

Energy Data Fac

Glossary

**Search results**

**BROWSE BY:**

- Program Components
- Program Design Phases
- Content Types

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

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

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

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

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

**CURRENT SEARCH**

Search found 19 items  
RFP [Clear All Filters](#)

**FILTER BY CONTENT TYPE:**

- [Program Materials \(18\)](#)
- [Program Presentations & Reports \(1\)](#)
- [Templates & Forms \(1\)](#)
- [Webcast \(1\)](#)

**FILTER BY PROGRAM COMPONENT:**

- [Program Design & Customer Experience \(1\)](#)
- [Evaluation & Data Collection \(4\)](#)
- [Marketing & Outreach \(4\)](#)
- [Financing \(11\)](#)
- [Contractor Engagement & Workforce Development \(1\)](#)

**FILTER BY PROGRAM DESIGN PHASE:**

- [Strategy Development \(11\)](#)
- [Planning \(13\)](#)
- [Implementation \(13\)](#)
- [Evaluation \(2\)](#)

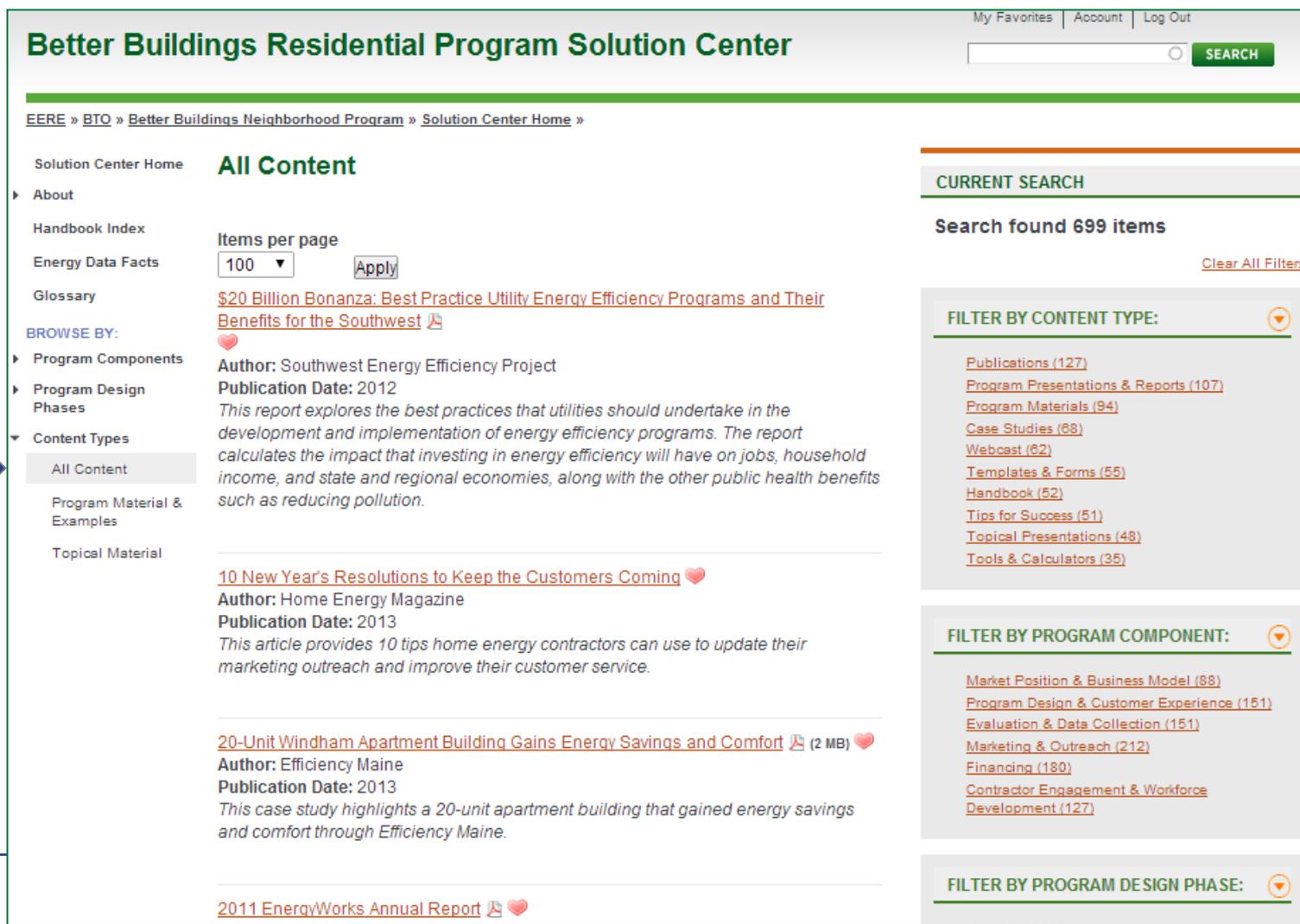
**FILTER BY STATE OR TERRITORY:**

- [Colorado \(3\)](#)
- [North Carolina \(3\)](#)
- [Michigan \(2\)](#)
- [Washington \(2\)](#)
- [Alabama \(1\)](#)
- [California \(1\)](#)
- [Illinois \(1\)](#)

Use filters to further refine results

# Example #6 (1 of 3)

## What are other programs doing to engage and train contractors?



The screenshot displays the 'Better Buildings Residential Program Solution Center' website. The page title is 'Better Buildings Residential Program Solution Center'. The breadcrumb trail is 'EERE » BTO » Better Buildings Neighborhood Program » Solution Center Home »'. The main content area is titled 'All Content' and shows search results for 'All Content'. The search results are filtered by content type, program component, and program design phase. The search found 699 items. The results list includes:

- \$20 Billion Bonanza: Best Practice Utility Energy Efficiency Programs and Their Benefits for the Southwest**  
Author: Southwest Energy Efficiency Project  
Publication Date: 2012  
This report explores the best practices that utilities should undertake in the development and implementation of energy efficiency programs. The report calculates the impact that investing in energy efficiency will have on jobs, household income, and state and regional economies, along with the other public health benefits such as reducing pollution.
- 10 New Year's Resolutions to Keep the Customers Coming**  
Author: Home Energy Magazine  
Publication Date: 2013  
This article provides 10 tips home energy contractors can use to update their marketing outreach and improve their customer service.
- 20-Unit Windham Apartment Building Gains Energy Savings and Comfort** (2 MB)  
Author: Efficiency Maine  
Publication Date: 2013  
This case study highlights a 20-unit apartment building that gained energy savings and comfort through Efficiency Maine.
- 2011 EnergyWorks Annual Report**

The right sidebar contains filters for 'CURRENT SEARCH', 'FILTER BY CONTENT TYPE', 'FILTER BY PROGRAM COMPONENT', and 'FILTER BY PROGRAM DESIGN PHASE'. The 'FILTER BY CONTENT TYPE' section lists various content types with their respective counts: Publications (127), Program Presentations & Reports (107), Program Materials (94), Case Studies (68), Webcast (62), Templates & Forms (55), Handbook (52), Tips for Success (51), Topical Presentations (48), and Tools & Calculators (35). The 'FILTER BY PROGRAM COMPONENT' section lists: Market Position & Business Model (88), Program Design & Customer Experience (151), Evaluation & Data Collection (151), Marketing & Outreach (212), Financing (180), Contractor Engagement & Workforce Development (127).

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

## All Content

Items per page  
100 ▾

[Contractors are your sales team – educate and empower them with the skills to market your program](#)  
♥

---

[Design a program that provides value for contractors and aligns with their business cycles](#)  
♥

---

[Ensure that training programs focus on the skills that employers want and the community needs](#)  
♥

---

[Establish a clear system and process for ensuring quality work](#) ♥

---

[Establish collaborative partnerships with contractors and communicate with them early and often](#)  
♥

---

[Have clear rules and systems for identifying and remedying contractor problems](#) ♥

---

[Help contractors enter the home performance market by lowering barriers to entry and providing training, networking, and mentoring opportunities](#)  
♥

---

[Provide information to help customers pick the right contractor](#) ♥

---

[Recognize and reward good contractor performance](#) ♥

## CURRENT SEARCH

Search found 9 items

- [\(-\) Tips for Success](#)
- [\(-\) Contractor Engagement & Workforce Development](#)

[Clear All Filters](#)

### FILTER BY CONTENT TYPE:

- [\(-\) Tips for Success](#)

### FILTER BY PROGRAM COMPONENT:

- [\(-\) Contractor Engagement & Workforce Development](#)

### FILTER BY PROGRAM DESIGN PHASE:

- [Overview \(5\)](#)
- [Strategy Development \(9\)](#)
- [Planning \(5\)](#)
- [Implementation \(8\)](#)
- [Evaluation \(8\)](#)

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

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

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

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

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

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

# Questions?

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

# Example #4: Filter for Webcasts (3 of 4)

**BBNP Search**

Enter your keywords  
quality assurance

Search

**Search results**

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

**CURRENT SEARCH**

Search found 1 item  
quality assurance  
[Webcast](#)

[Clear All Filters](#)

**FILTER BY CONTENT TYPE:**

[Webcast](#)



DOE Technical Assistance Program

U.S. DEPARTMENT OF ENERGY | Energy Efficiency & Renewable Energy

The Parker Ranch installation in Hawaii

**Quality Assurance for Residential Retrofit Programs**

October 26, 2010

**Jim Grevatt**  
Vermont Energy Investment Corporation  
DOE Technical Assistance Program  
Team 4 – Program & Project Development & Implementation

# Example #4: Filter for Publications (4 of 4)

Enter your keywords

quality assurance

Search

## Search results

### [Quality Assurance and Enduring High Quality Work](#)

Author: Home Performance with Energy Star

Publication Date: 2011

Overview of quality assurance guidelines for Home Performance with ENERGY STAR.

### [Job Quality, Equitable Access and Quality Assurance Standards in Leading Residential Weatherization Programs](#)

Author: Community Benefits Law Center

Publication Date: 2010

Summary of the standards that support job quality, equitable access and quality assurance in several residential energy efficiency programs from different parts of the country.

### [Quality Assurance Best Practices: Home Energy Performance with ENERGY STAR Programs](#)

Author: U.S. Department of Energy

Publication Date: 2011

This publication lists quality assurance best practices on how to create a quality assurance plan and the components that these plans should include.



## Quality Assurance Best Practices

### Quality Assurance Best Practices: Home Performance with ENERGY STAR Programs

While the EPA's Home Performance with ENERGY STAR is not the only whole house retrofit program in operation, it offers a set of standard guidelines and best practices for Quality Assurance (QA) that should be utilized in starting any new or updating existing home retrofit programs.

In order to sponsor a Home Performance with ENERGY STAR program, organizations must submit an implementation plan which includes Quality Assurance protocols. In order to meet ENERGY STAR requirements, QA plans must explain how the program will ensure participating contractors will meet program standards. QA plans must explain:

- **Contractor company and staff qualification requirements** intended to ensure that qualified building scientists are assessing the home and are capable of protecting the brand promise of ENERGY STAR. These capabilities include:
  - Contractor staff understand how to represent the program and their participation in it
  - Contractor staff understand the energy efficiency strategies applicable for residential retrofits
  - Contractor staff can protect the health and safety of occupants when installing energy efficiency measures
  - Contractor companies have proper licenses, insurance, etc.
  - Contractor companies sign participation agreements that outline proper conduct and program requirements
- **Reporting process** that requires participating contractors to report jobs that are promoted to homeowners and performed under the HPwES logo.
  - Some – but not all – programs want to pre-approve jobs prior to commencement. However, this pre-approval tends to slow down jobs and can potentially reduce the audit-to-retrofit conversion rate.
  - Compliance with program requirements and industry standards (see below)
- **Job report review process** that ensures program compliance and provides for follow-up with the contractor when necessary
  - Reporting of jobs (aka "file checks") serve multiple purposes:
    - Rebate processing (i.e., eligibility of installed measures)
    - Sufficient data to have some reasonable assurance that measures will save energy
    - Confirmation that health & safety measures were being followed
      - Combustion safety – draft test, Combustion Appliance Zone (CAZ) tests
      - Ventilation – ASHRAE compliance
      - Lead safe practices
      - Other (moisture, asbestos, etc.)
    - Data that could be used to inform an on-site QA visit
    - Opportunity to mentor contractors

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

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Better Buildings Residential Program Solution Center

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

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Energy Data Facts  
Glossary

BROWSE BY:  
Program Components  
Program Design Phases  
Content Types

## Marketing & Outreach Materials

### Resources

#### Templates & Forms

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

Remove this item from your Marketing & Outreach Materials Favorites Folder

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

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

### Handbooks

#### Marketing & Outreach

[Overview](#) (1) 04/25/2014  
Spur consumer demand for your program's services by understanding your target audience and motivating them to act using effective messaging, marketing and outreach tactics, and attractive program offers.

MY FAVORITES

- [Finance Favorites](#)  
6 items
- [Marketing & Outreach Materials](#)  
4 items
- [New Favorites Folder](#)

Hover over name to remove items

All of your "My Favorites" folders are shown here

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

# Example #5 (1 of 5)

I've found a lot of useful ideas and examples about marketing and outreach across the Solution Center.

How do I save the materials so I can refer to them later?

## Marketing & Outreach – Deliver Program

Where Am I?

Subscribe

PDF version

Print this page

Description Step-by-Step Tips for Success Examples Toolbox Technical Resources

### Step-By-Step

Now is the time to use your [strategies and tactics](#) to deploy [resources and materials](#) that will create demand for your program offerings.

It is important to get ready for a sudden influx of interest by [launching your workplan and timelines](#), and start [collecting the data](#) to make mid-stream adjustments based on the market's response.

The following steps can help you effectively deliver the program:

Click the heart to add content to My Favorites

Expand All

#### Assess your marketing program's readiness

Most aspects of your program should be in place before you launch marketing and outreach activities. Following are just a few questions to help you assess the readiness of your staff, materials, contractors, and other partners to support your marketing and outreach efforts:



#### Key Takeaways

- Use valuable, short-term promotion to jump-start program interest
- Build on existing energy efficiency efforts to launch quickly and learn for the next iteration
- Plan for contingencies and resolve your errors

"Getting on the landscape fast with some successes built positive momentum. There will be warts, so set reasonable expectations... but it is a great way to let people know you are on the scene."  
—Karl Ribago, Vice President, Austin Energy

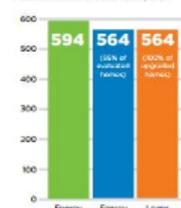
#### Launch With a Short-Term Promotional Offer to Jump-Start Participation

With its Best Offer Ever promotion, Austin Energy completed comprehensive energy upgrades in a record 564 homes in only six months—more than 10 times the utility's typical participation rate. To quickly develop momentum for Better Buildings-Austin Energy's Clean Energy Accelerator program with homeowners, Austin Energy leveraged its existing Home Performance with ENERGY STAR® infrastructure, experience, and contractor base but added a comprehensive on-site financing offer for a finite launch period. Demand soared, and due to thoughtful planning, Austin Energy and its contractors were able to keep up with requests for energy evaluations, inspections, improvements, and loan origination, while learning valuable lessons along the way.

The Best Offer Ever  
Austin Energy's high-value promotion—the Best Offer Ever—spearheaded customers who signed up for an energy upgrade between October 1 and December 31, 2010, with a significant financial incentive, resulting in 564 Home Performance with ENERGY STAR upgrades in six months. In the past, participants in Austin Energy's Home Performance with ENERGY STAR program received a free energy evaluation, but had to choose between a rebate or low-interest rate financing through a local credit union to complete the recommended upgrades.\* By signing up during the promotion, participants could receive both the rebate and financing, for a combined value of approximately \$2,300 per household. Even with the sizable incentive, Austin Energy leveraged \$4.39

Figure 1. Best Offer Ever Promotion Results

Data reflect energy upgrades completed between October 1, 2010, and March 31, 2011, under the Best Offer Ever. The Best Offer Ever was only available to homeowners who signed up between October 1 and December 31, 2010.



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

**Better Buildings Residential Program Solution Center**

EERE » BTO » Better Buildings Neighborhood Program » Solution Center Home » Program Components » Marketing & Outreach

Solution Center Home  
About  
Handbook Index  
Energy Data Facts  
Glossary  
BROWSE BY:  
Program Components  
Program Design Phases  
Content Types

## Marketing & Outreach – Deliver Program

[Where Am I?](#)

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- Finance Favorites  
6 items
- + New Favorites Folder

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

### Add a new Favorites Folder

Title \*

Marketing & Outreach Materials

A short, descriptive title for this Favorites Folder. Limit to 255 characters.

Save

9. [Assess & Improve Processes](#)  
10. [Communicate Impacts](#)

**Description**

It is time to put all of your planning program's marketing and outreach and your program should be in place before [outreach partners](#), [staffing and outreach materials](#), and [evaluation](#).

You and your partners will want to create materials that can be generated by new materials with contractors, relevant program materials, the influx of energy assessments, and other applications.

Your program will use a variety of marketing and outreach approaches to reach your [priority audiences](#). As soon as your marketing activities are underway, you should also begin to [track progress](#) across your various tactics to identify what works well in your local market and make necessary mid-stream adjustments.

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

## Marketing & Outreach – Overview

[Where Am I?](#)



[Subscribe](#)



[PDF version](#)



[Print this page](#)

### Driving Demand

for Home Energy Improvements:

Motivating residential customers to invest in comprehensive upgrades that eliminate energy waste, avoid high bills, and spur the economy



September 2010

Environmental Energy Technologies Division  
Lawrence Berkeley National Laboratory



### Publications

[Driving Demand for Home Energy Improvement](#)

**Author:** Lawrence Berkeley National Laboratory

**Publication Date:** 2010

*This guide provides an assessment of various approaches to Marketing & Outreach for home energy efficiency improvements.*

[Examples](#)

[Toolbox](#)

[Topical Resources](#)

[Quick Links](#)

al information related to this handbook, which include presentations, materials from and about individual programs.

[Conference presentation archive](#)

ference

and Climate Change (BECC) Conference. BECC is the premier event organizational behavior and decision-making related to energy usage, e, and sustainability. Past conference presentations include various h.

[Outreach](#)

Add or remove this item in your favorites folders.

Finance Favorites  
6 items

Marketing & Outreach Favorites  
3 items

[New Favorites Folder](#)

ing and communications

# Example #5: Subscribe to Updates (4 of 5)

Subscribe to email updates about Solution Center content:

- Look for the “Subscribe” link at the top of handbooks.
- Access your user account to manage subscription preferences.

**From:** Better Buildings Residential Program Solution Center [mailto:no-reply@brak.pnl.gov]  
**Sent:** Friday, May 30, 2014 11:35 AM  
**To:**  
**Subject:** Better Buildings Residential Program Solution Center Subscriptions

Greetings,

The Better Buildings Residential Program Solution Center is notifying you of the following changes based on your subscription preferences:

**Handbook**

**Title:** Program Design & Customer Experience – Deliver Program

**Authors:** DOE

**Link:** <https://bbnp.pnnl.gov/handbooks/program-design-customer-experience—deliver-program>

**Title:** Marketing & Outreach – Assess the Market

**Authors:** U.S. Department of Energy

**Link:** <https://bbnp.pnnl.gov/handbooks/marketing-outreach—assess-market>

**Title:** Program Design & Customer Experience – Develop Evaluation Plans

**Authors:** U.S. Department of Energy

**Link:** <https://bbnp.pnnl.gov/handbooks/program-design-customer-experience—develop-evaluation-plans>

**Title:** Marketing & Outreach – Communicate Impacts

**Authors:** U.S. Department of Energy

**Link:** <https://bbnp.pnnl.gov/handbooks/marketing-outreach—communicate-impacts>

**Title:** Program Design & Customer Experience – Communicate Impacts

**Authors:** U.S. Department of Energy

**Link:** <https://bbnp.pnnl.gov/handbooks/program-design-customer-experience—communicate-impacts>

# Example #5: Print or Save a PDF (5 of 5)

**Marketing & Outreach – Develop Resources**

Where Am I? [Subscribe](#) [PDF version](#) [Print this page](#)

Marketing & Outreach – Develop Resources.pdf - Adobe Reader

File Edit View Window Help

1 / 21 99.4%

Tools Sign Comment

<https://bbnp.pnnl.gov/handbooks/marketing-outreach-%E2%80%93-develop-resources>

## Marketing & Outreach – Develop Resources

### Description

Successful programs need consistent, high quality marketing and outreach materials and resources that promote the program benefits in a way that will resonate with customers. Once you [defined your target audiences](#) and [messaging](#) based on their motivations, you devised a [plan to create demand for your program](#) that will leverage your brand using a variety of [strategies and tactics](#). Now you can develop marketing and outreach resources to reach your audiences.

The types of marketing and outreach resources that your program might use range from direct mail and advertising to one-stop-shop websites, social media content, videos, and infographics (visual representations of information or data intended to present complex information quickly and clearly). Resources can also include talking points, signage, banners, exhibits, and collateral materials that can be distributed by your marketing and outreach partners and staff at events.

Whatever materials you create, they should align with your program brand's personality, tone, messaging, and look-and-feel to reinforce program awareness and expand the impact of your materials to increase consumer demand.

To assist your resource development efforts, this section covers the following topics:

- Staff and plan to develop marketing & outreach resources
- Create a distribution plan
- Develop materials that motivate with a call to action
- Brand your outreach consistently
- Use traditional and modern materials
- Share your materials internally and with partners

#### Marketing & Outreach

Stages:

1. [Assess the Market](#)
2. [Set Goals & Objectives](#)
3. [Identify Partners](#)
4. [Make Design Decisions](#)
5. [Develop Implementation Plans](#)
6. [Develop Evaluation Plans](#)
7. [Develop Resources](#)
8. [Deliver Program](#)
9. [Assess & Improve Processes](#)
10. [Communicate Impacts](#)

personality, tone, messaging, and materials to increase consumer

ics:

- [Develop materials that motivate with a call to action](#)
- [Brand your outreach consistently](#)
- [Use traditional and modern materials](#)
- [Share your materials internally and with partners](#)

# Future Enhancements

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