

The Better Buildings Residential Network Training Toolkit can be used by residential energy efficiency programs interested in realizing the value of providing training opportunities for contractors, staff, and volunteers. For example, according to a [comprehensive evaluation](#) of more than 140 energy efficiency programs across the country that participated in a \$500 million grant program, contractor training activities have achieved positive results, including more comprehensive upgrades, a higher assessment-to-upgrade conversion rate, improved program processes, improved quality control, and increased revenues, among other benefits.

This Training Toolkit is for program managers to identify training resources and opportunities to help staff, volunteers, and contractors enhance their understanding of building science; sales and marketing; residential energy efficiency program offerings; and business development. [Better Buildings Residential Network](#) members provided input and review for toolkit content.

Successful residential energy efficiency training approaches start with partner organizations that can help deliver training. Three types of training for contractors, staff, energy advisors, and volunteers follow below:

1. **Technical training:** building science, energy assessments, technologies, and techniques
2. **Outreach training:** promotion of program offerings, sales training, and customer engagement
3. **Professional training:** business development and management for participating contractors

Additional resources follow at the end of the toolkit, including more details on the [Better Buildings Residential Program Solution Center](#), which is an online collection of resources and lessons learned concerning training and many other topics from years of hard-won experience by residential energy efficiency programs.

Getting Started With Good Partners

When it comes to training, there's no need to reinvent the wheel. Collaborate with organizations such as colleges, trade groups, and local job or skills development organizations to access and enhance existing training programs and resources. For example, community colleges can be great partners; they have been willing to add home performance studies to their curricula, and in return, can use your program for training with home energy upgrade projects in the field.

Trade organizations and job placement programs for underserved communities also make good training partners, and have access to funding that can subsidize technical training as a way to build the local workforce and economy. Following are just a few programs and examples that have found local partners to enhance training program success:

- ▶ [Southeast Energy Efficiency Alliance](#) programs partnered with veterans' groups and job training programs to reach and teach new sources of home performance contractors. Nexus Energy Center, the program implementer in Huntsville, Alabama, used a U.S. Department



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of Labor grant to fund sales training and continuing education for its contractors. Nexus also partnered with Drake State Technical College to provide training for veterans.

> Profile – [Consortium Gets Wise About Energy Upgrades](#)

- ▶ New Hampshire Better Buildings worked with Lakes Region Community College to offer in-depth training classes on its new energy assessment software.
 - > Better Buildings Residential Program Solution Center – [Consider partnering with local colleges to provide technical training](#)
- ▶ EnergyWorks in Philadelphia established a partnership with a local community college to include U.S. Department of Energy (DOE) guidelines in classroom curricula, as well as provide lab and in-the-field training.
 - > Better Buildings Residential Program Solution Center Video – [“Partner to Offer Comprehensive Training”](#)
- ▶ Fayette County, Pennsylvania, partnered with a local nonprofit organization, the Private Industry Council, to offer contractors free training to become certified through the Building Performance Institute (BPI), a requirement for participation in the county’s energy efficiency program.
 - > Better Buildings Residential Program Solution Center Case Study – [Developing the Skills and Tools for Workforce Success](#)

Types of Training

While many types of training exist, the three broad categories covered in this toolkit include:

1. **Technical training** for contractors and staff energy advisors concerning building science, energy assessments, and energy-efficient technologies and techniques; this type of training can also lead to better credentials for contractors, such as certification from independent sources.
2. **Outreach training** to help contractors, staff, and volunteers engage customers, increase sales, and promote financing options and other program benefits; program message and brand training for staff and volunteers; and training for influential actors in the market, such as real estate agents.
3. **Professional training** can help contractors build and manage their businesses better and help make them more sustainable, which is essential for the long-term success of energy efficiency markets. Professional training can also enhance call center staff’s customer service skills.

Tips for Trainers

Following are selected best practices from successful training organizations. Even if your organization isn’t providing the training, consider sharing these tips with those who do:

- Technical training can be provided in many formats—don’t limit it to traditional classroom settings where the trainer just talks at trainees—ask them questions.
- People have different styles of learning; vary teaching techniques to engage the harder-to-reach audience members.
- Hands-on training is essential, both through lab experience and in the field.
- Encourage active participation with open-ended questions, role playing, and “what would you do” scenarios.
- See the New Mexico EnergySmart Academy, Santa Fe Community College Presentation for ideas: [“Home Performance Training and Mentoring: Lessons and Resources.”](#)
- You can also find and share best practices with the Trainers and Mentors Group on the [Home Energy Pros website](#).

Technical Training

Most successful residential energy efficiency programs require contractors to have a strong knowledge of building science and how to convey its benefits to the customer; as the main point of contact, they help customers understand the benefits of home energy improvements.

Before committing resources to technical training, contractor engagement is essential for energy efficiency programs to ensure training meets the needs of the local marketplace and employers.

- ▶ Austin Energy encouraged trainers to highlight issues that were particularly applicable to the local climate and housing stock and to avoid irrelevant issues, such as upgrades of basements, which are uncommon in Texas.
- > Better Buildings Residential Program Solution Center – [Ensure that training programs focus on the skills that employers want and the community needs](#)



Austin Energy provides trainings for contractors on the International Energy Conservation Code.

Contractors can also benefit from the credibility that independent certifications provide. Many of the trainings described here offer preparation for certifications contractors can use to enhance their skills and differentiate themselves from competitors. Below is a list of residential energy efficiency credentials and directories of training programs:

- ▶ [BPI: Training and Education](#)
- ▶ [Residential Energy Services Network \(RESNET\): Accredited Programs](#)
- ▶ [Home Energy: 2015 Training Guide](#)
- ▶ [Weatherization Assistance Program Technical Assistance Center: Training Resources](#)

Examples of programs using these and other existing guidelines, resources, and standards to develop program goals and technical training for contractors include the following:

- ▶ Better Buildings Northwest Ohio partnered with Owens Community College and Conservation Services Group (which is now part of [CLEARResult](#)) to provide BPI assessment training for energy professionals.
 - > Profile – [Toledo Better Buildings With Financing Options](#)
 - > Better Buildings Residential Network Peer Exchange Call – [“Home Performance Training and Mentoring: Lessons and Resources”](#)
 - > [DOE Guidelines for Home Energy Professionals](#) (see box at right)

Guidelines for Home Energy Professionals

The Guidelines for Home Energy Professionals project is a collaboration between DOE and the home performance market to establish a national residential energy upgrade industry and a skilled and credentialed workforce. The project creates:

- A defined quality of work through [standard work specifications](#)
- Advanced [professional certifications](#) for home energy workers
- A rigorous [accredited training process](#)

[Learn more about the project and find project updates.](#)

Outreach Training

Sales training for contractors proved to be one of the single most effective approaches undertaken by energy efficiency programs, according to the [comprehensive evaluation](#) of more than 140 programs involved in a \$500 million residential energy efficiency grant program. Contractors are often an energy efficiency program's primary point of contact for customers. The evaluation found that successful programs increased contractors' sales effectiveness by offering sales training.

"The sales training and marketing experience in our company means we don't need incentives to be successful in the long term."

— Richard Burbank
Evergreen Home Performance



- ▶ [Efficiency Maine](#) provided contractors with training to more effectively close upgrade sales with homeowners, and the program's assessment-to-upgrade conversion rate subsequently grew from 10% to 60%.
 - > [Better Buildings Residential Program Solution Center Case Study – Contractor Sales Training Boosts Energy Upgrade Conversions](#)
 - > [Better Buildings Residential Program Solution Center – Contractors are your sales team – educate and empower them with the skills to market your program](#)
 - > [Better Buildings Residential Network Peer Exchange Call – "Contractor Sales Training"](#)
- ▶ After [Build It Green](#) provided Oasis Air Conditioning, one of its small contractors, with trainings concerning sales, marketing, business processes and quality, and technical skills, the company increased its annual home upgrade projects from two in 2012 to 28 in 2015.
 - > [Better Buildings Residential Network Peer Exchange Call – "Strengthening the Front Lines: Sales Training and Continuing Education for Contractors"](#)

Contractors aren't your only salespeople; make sure staff and volunteers are trained concerning your program's brand and benefits.

- ▶ [Community Home Retrofit Project \(CHERP\)](#), a nonprofit organization supported almost entirely by local volunteers, has engaged more than 10 California communities to reduce the energy consumption in homes by making effective whole-house energy-efficiency improvements. The program credits its success to simplifying the engagement process and holding a series of workshops to educate volunteers.
 - > [Better Buildings Residential Program Solution Center Case Study – Community Home Energy Retrofit Project: Community Engagement](#)
- ▶ The Connecticut Neighbor to Neighbor Energy Challenge collected and evaluated data from various outreach activities and used the results to improve its program. By educating the outreach team, refining its pitch, and designing a way to effectively follow up with customers, the program increased its assessment to upgrade conversion rate by 35%.
 - > [Better Buildings Residential Program Solution Center Presentation – "Neighbor to Neighbor Energy Challenge: Analyzing Outreach Effectiveness to Improve Program Design"](#)



- ▶ **Enhabit** (formerly Clean Energy Works) provided contractors in Oregon with business and finance training opportunities, which included discussions of Enhabit’s loan offerings, eligible lenders, and instructions for using finance as a tool to drive sales. The trainings helped improve contractors’ business processes and contributed to the completion of more than 3,000 upgrades.
 - > Better Buildings Residential Program Solution Center – [Help contractors understand the program’s financing options and benefits, so they can communicate to homeowners](#)

You can even consider training audiences who influence the real estate market concerning valuing energy efficiency upgrades. A number of certifications are available for real estate agents, for example: [EcoBroker Green Designation](#), [Earth Advantage Broker](#), [Earth Advantage Accredited Green Appraiser](#), and [Build it Green’s Certified Green Real Estate Professional Designation](#).

- ▶ The Better Buildings Colorado program is engaging the real estate community by providing Home Energy Score trainings to the Colorado Association of REALTORS.
 - > [Better Buildings Colorado REALTOR Training Website](#)
- ▶ The City of Portland (Oregon) Bureau of Planning and Sustainability and Enhabit supported Earth Advantage’s Value It Green Home Tour, where hundreds of real estate professionals learned about the latest energy-efficient technologies so they could better convey their value in the marketplace to home buyers.
 - > Story – [“Promoting High-Performance Homes to Portland Real Estate Pros”](#)
 - > White Paper – [Capturing Energy Efficiency in Residential Real Estate Transactions](#)

Professional Training

To help keep programs and local residential energy efficiency markets sustainable in the long term, some programs provide general business assistance and training to contractors. Regular communication between programs and contractors concerning program updates and good data management practices is essential to ensure consistency between the program and its upgrade providers.

- ▶ By holding bi-monthly meetings with its 16 independent contractors, [NeighborWorks H.E.A.T. Squad](#) in Vermont established a forum to provide learning opportunities, review program issues, and allow contractors to share techniques and products.
 - > Presentation – [“Concierge Programs for Contractors – They’re Not Just for Consumers Anymore”](#)
 - > Better Buildings Residential Program Solution Center – [Help contractors enter the home performance market by lowering barriers to entry and providing training, networking, and mentoring opportunities](#)



NeighborWorks H.E.A.T. Squad uses bi-monthly contractor meetings to review program offerings, discuss program issues, and share sales techniques.

- ▶ [Be SMART Maryland](#) noticed that discrepancies arose in the variety of ways contractors determined energy savings and the type of energy modeling software used, so the program developed a standard methodology for its contractors to estimate energy savings and brought in quality inspectors to help identify and correct issues in assessment reports.
- ▶ Better Buildings Residential Program Solution Center – [Provide materials and training to ensure data quality, consistency, and accuracy](#)

While contractor training is important, don't forget to educate the other people on the front lines of your program, such as call center staff, concerning customer service and program promotion.

Additional Resources

In addition to training, DOE provides technical and partnership information on professional resources available to contractors:

- ▶ Training – [Home Energy Score Simulation Training](#)
- ▶ Training – [Home Performance with ENERGY STAR Training](#)
- ▶ Guidelines – [Building America's Guidelines for Building Science Education](#)
- ▶ Discussion Group – [Home Energy Pros: Trainers and Mentors Group](#)

Materials in this toolkit and more information concerning training resources can be found in the [Better Buildings Residential Program Solution Center](#), an online collection of resources and lessons learned. The Solution Center helps residential energy efficiency programs and partners:

- ▶ Minimize trial and error to achieve training success
- ▶ Plan, operate, and evaluate their training programs
- ▶ Access a living repository of training examples and resources.

Send your feedback concerning this toolkit and your training efforts to bbresidentialnetwork@ee.doe.gov.



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

Members of the Residential Network join with fellow energy efficiency programs and partners to identify and address common challenges and market opportunities through voluntary initiatives that result in the development of new tools and resources.

Invitations are then sent out for a limited-time effort to develop a toolkit to address the needs identified, such as this toolkit concerning training.

[Contact us](#) for more information about participating in the next Residential Network Voluntary Initiative, or to join the Residential Network.