



**Better Buildings Residential Network Peer
Exchange Call Series: *Secret Sauce: Recruiting
and Retaining Qualified Contractors (101)***

October 6, 2016

Call Slides and Discussion Summary

Agenda

- Agenda Review and Ground Rules
- Opening Polls
- Brief Residential Network Overview
- Featured Speakers
 - **Scott Bloedorn**, Residential Efficiency Program Lead, Focus on Energy, Wisconsin
 - **Julie Saporito**, Program Administrator, City and County of Denver (*Network Member*)
- Discussion
 - What are effective ways to attract contractors to participate in residential energy upgrade programs?
 - How can programs keep top-performing contractors happy so they continue to participate and do high-quality work?
 - How do you make program administration work for both the program and participating contractors?
 - Other questions/issues related to contractor recruitment and retention?
- Closing Poll and Upcoming Call Schedule

Better Buildings Residential Network

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.

Membership: Open to organizations committed to accelerating the pace of home energy upgrades.

Benefits:

- Peer Exchange Calls 4x/month
- Tools, templates, & resources
- Recognition in media, materials
- Speaking opportunities
- Updates on latest trends
- Voluntary member initiatives
- Residential Program Solution Center guided tours

Commitment: Provide DOE with annual number of residential upgrades, and information about associated benefits.

For more information or to join, email bbresidentialnetwork@ee.doe.gov, or go to energy.gov/eere/bbrn and click Join

Best Practices: Focus on Energy, Wisconsin



focus on energysm

Partnering with Wisconsin utilities

Scott Bloedorn

**Focus on Energy - Wisconsin
Residential Programs Lead**

..... Saving Energy and Money For Wisconsin

About Focus on Energy

- Focus on Energy is Wisconsin utilities' statewide energy efficiency and renewable resource program.
- We recently celebrated our 15 year anniversary!
- Over 2,500 contractors have participated in our residential programs since 2012.

Contractor Recruitment

- What do you have to offer?
 - Incentives/Rebates
 - Leads
 - Brand recognition
 - Legitimacy
 - Competitive advantage over competition
 - Training/Certifications

Contractor Retention

- How do we keep them satisfied and motivated?
 - Personal attention
 - Recognition for achievements
 - Listening to their concerns
 - Trade Ally Advisory Group (TAAG) meetings
 - Feedback loops

Presentation Highlights: Focus on Energy – Wisconsin

Network Benefits: Providing contractors benefits for participating in the network is an important first step in recruitment:

- **Leads:** Money talks, and incentives are valuable, but providing leads also impacts a contractor's bottom line.
- **Legitimacy:** Customers that look for contractors via the program network expect high quality.
- **Advantage:** Contractors pay close attention to competition. If a competitor is offering incentives from the program to their customers, contractors will want those offerings as well.
- **Branding:** Cooperative advertising can help subsidize the cost of materials for contractors and ensure the program brand is seen.

Don't sacrifice quality for quantity: Mistakes happen when you are casting wide net trying to get contractors into the program.

- **Use caution and quality assurance when handing out your affiliation.** Take advantage of resources such as Angie's List or Better Business Bureau to vet applicants.

Best Practices: City and County of Denver

CONTRACTOR PARTICIPATION AND RETENTION

DENVER ENERGY CHALLENGE PROGRAM



JULIE SAPORITO, PROGRAM MANAGER
CITY & COUNTY OF DENVER



RESIDENTIAL PROGRAM BACKGROUND

- Energy efficiency program administered by the City and County of Denver (3rd party implementer is CLEAResult)
- Target audience: Denver residents (low-income residents are served by another department)
- Elements include:
 - Energy advisor (free service, no audit required)
 - Energy loans
 - Vetted contractor pool
- No rebates
- No free upgrades



PARTICIPATION AND RECRUITMENT

THEN

- Original pool was managed by the City = too many companies listed, little differentiation
 - Recruitment was fairly easy because we were a new program and no requirements
 - Rebates enticed participation but weren't around long

NOW

- CLEAResult manages current pool for Denver, Boulder and others along Front Range
- Budget dictates how many contractors are in our pool so recruitment isn't as necessary
 - Word of Mouth referrals from residents
- Boulder County's EnergySmart program offers rebates which helps with retention



REQUIREMENTS

- License and Certification requirements appropriate in communities served
- BPI Manager on staff
- Licensed to perform CAZ testing
- Approved contractor with local utility (Xcel Energy)
- Maintain minimum of 75 point score to stay in program (out of 100)
 - Follow Program and Installation Standards
 - Inspection failures
 - Customer service
 - Complete 1 job every 6 months to stay in pool



DENVER
ENVIRONMENTAL HEALTH



CONTRACTOR BENEFITS

- Lead generation
- Workforce training
- Quality Assurance checks on insulation jobs
- Promotion/Co-Branding
- Program rebates (EnergySmart)
- Pool established “installation guidelines” applicable to our region, higher standards
- Access to best practice documents which takes load off contractors to develop on their own
- Participation is FREE for them!



SUCCESSSES

- Pooled resources across different programs help bring down costs
 - Leverage resources to offer workforce development trainings
 - Train and coordinate same companies across different programs for consistency
- Ability for program to obtain customer feedback and stay on top of homeowner experiences, especially when issues arise
- Ongoing idea exchanges with other contractors and experts



REPORT CARD GIVEN MONTHLY TO CONTRACTORS

- Total homes upgraded and measures completed (min of 1 job every 6 months required)
- Contractor Score
- QC performed
- Number of corrections notices sent
- Number of Sign-off sheets missing
- Investment by customer
- Rebates processed by using the service
- Cost of projects covered by Energy Loan



CHALLENGES

- Leads tend to be one-way (from program to contractor)
- Ongoing cost to local government in order to have a 3rd party manage
- Fine line between too many and too few in the pool
- Haven't cracked the nut in having contractors promote financing product(s) more regularly



THANK YOU

Julie Saporito, Program Manager
City & County of Denver



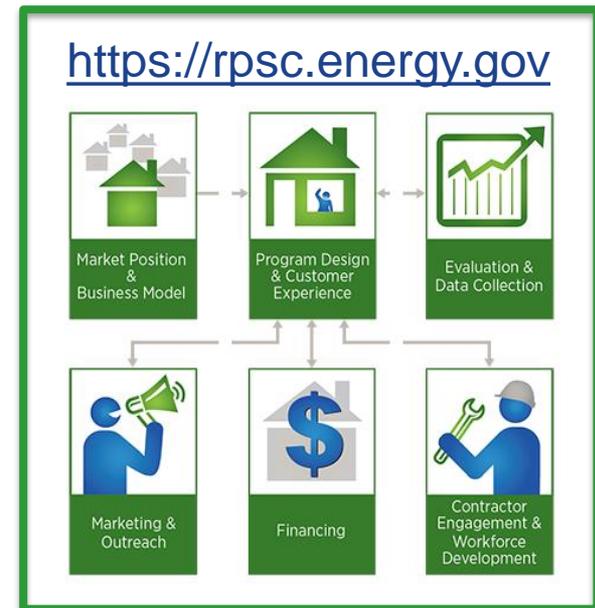
Program Highlights: City and County of Denver

- **Quality:** Government agencies are not able to endorse one company over another, so **program design should incorporate sufficient requirements to ensure the quality** of contractor applicants.
 - The City and Country of Denver realized that its initial open program did not do enough to vet contractors, and it proved to be a big burden to administer. By revamping the program with requirements to ensure quality, they were able to transition the program without “kicking out” contractors.
- **Resources:** Although third-party implementers are costly, internalizing the time and cost of administering a contractor network may outweigh the benefit of in-house implementation.
- **Feedback:** Contractor **report cards can be a useful tool for drawing contractor’s attention to their impact** and standing within the program. Denver has just launched a report using contractor input on useful measures to evaluate.

Related Resources in the Residential Program Solution Center

Explore resources related to recruiting and retaining qualified contractors:

- Explore the [Contractor Engagement & Workforce Development – Identify Partners](#) handbook for information & tools to assess potential contractors, develop recruitment strategies, & establish ongoing relationships.
- See the [Tip for Success](#) and its programmatic examples for establishing partnerships with contractors and communicating with them early & often.
- Check out the [Spotlight on Portland, Oregon](#) about making the program work for contractors.



- While you're there, see the latest [Proven Practices](#) post on [Contractor Financing Education](#).
- The Solution Center is continually updated to support residential energy efficiency programs—[member ideas are wanted!](#)

Discussion Highlights

- When expanding your network, **avoid the temptation to grow rapidly**. Instead, focus on contractors that provide quality service.
- Contractors are busy! **Be mindful of the amount of time the program requires** from contractors.
- To keep pace, **use forms of communication that reach contractors where they are**, such as cell phone calls and in-person visits.
- **Streamline the program for contractors** by dedicating a staff member as their single point of contact to guide them through the program and answer questions.
- **Staff your contractor recruitment position with a former contractor** to gain valuable insights into their work and needs.
- **Create space for contractors to open up and give meaningful feedback** by hosting focus groups that last a few hours. By lunchtime, they may be more willing to share than in the first hour.

Spread the Word!

Do you have new staff in your organization that might benefit from Peer Exchange Calls?

Network Members, such as VEIC, inform their new employees of upcoming calls to spread the knowledge and grow the network!

New staff can sign up to receive upcoming call information. To do so, email bbresidentialnetwork@ee.doe.gov, or visit energy.gov/eere/bbrn and click Join

Peer Exchange Call Series

We hold one Peer Exchange call the first four Thursdays of each month from 1:00-2:30 pm ET

Calls cover a range of topics, including financing & revenue, data & evaluation, business partners, multifamily housing, and marketing & outreach for all stages of program development and implementation

Upcoming calls:

- October 13: Moving Beyond Split-Incentives: Engaging Rental Property Tenants and Owners in Energy Efficiency (301)
- October 20: Here Comes the Sun: Advances in Residential Solar (301)
- October 27: Connect 4: Energy Efficiency in Relation to Other Program and City Goals (101)

Send call topic ideas to peerexchange@rossstrategic.com

See the Better Buildings Residential Network Program [website](#) to register

Addenda: Attendee Information and Poll Results

Call Attendees: Network Members

- American Council for an Energy-Efficient Economy (ACEEE)
- Boulder County
- Bridging The Gap
- California Center for Sustainable Energy
- Center for Energy and Environment (CEE)
- Center for Sustainable Energy
- City of Fort Collins
- City of Providence
- CLEAResult
- Efficiency Nova Scotia
- Efficiency Vermont
- Mountain Association for Community Economic Development
- New York State Energy Research and Development Authority (NYSERDA)
- TRC Energy Services
- U.S. Department of Energy (DOE)
- Vermont Energy Investment Corporation (VEIC)
- Wisconsin Energy Conservation Corporation (WECC)

Call Attendees: Non-Members

- BKi
- Carolina Smart Homes
- City of Milwaukee
- EfficiencyOne
- Emerald Cities Seattle
- Environmental Design / Build
- Minnesota Pollution Control Agency
- Pratt center for Community Development
- Renew Financial
- Snohomish County PUD
- State of Delaware
- The Energy Network
- University of North Texas
- Ventura County Regional Energy Alliance

Opening Poll

- Which of the following best describes your organization's experience recruiting and retaining qualified contractors?
 - Very experienced/familiar – **42%**
 - Some experience/familiarity – **26%**
 - Limited experience/familiarity – **19%**
 - Not applicable – **13%**
 - No experience/familiarity – **0%**

Closing Poll

- After today's call, what will you do?
 - Seek out additional information on one or more of the ideas – **60%**
 - Consider implementing one or more of the ideas discussed – **40%**
 - Make no changes to your current approach – **0%**
 - Other (please explain) – **0%**