

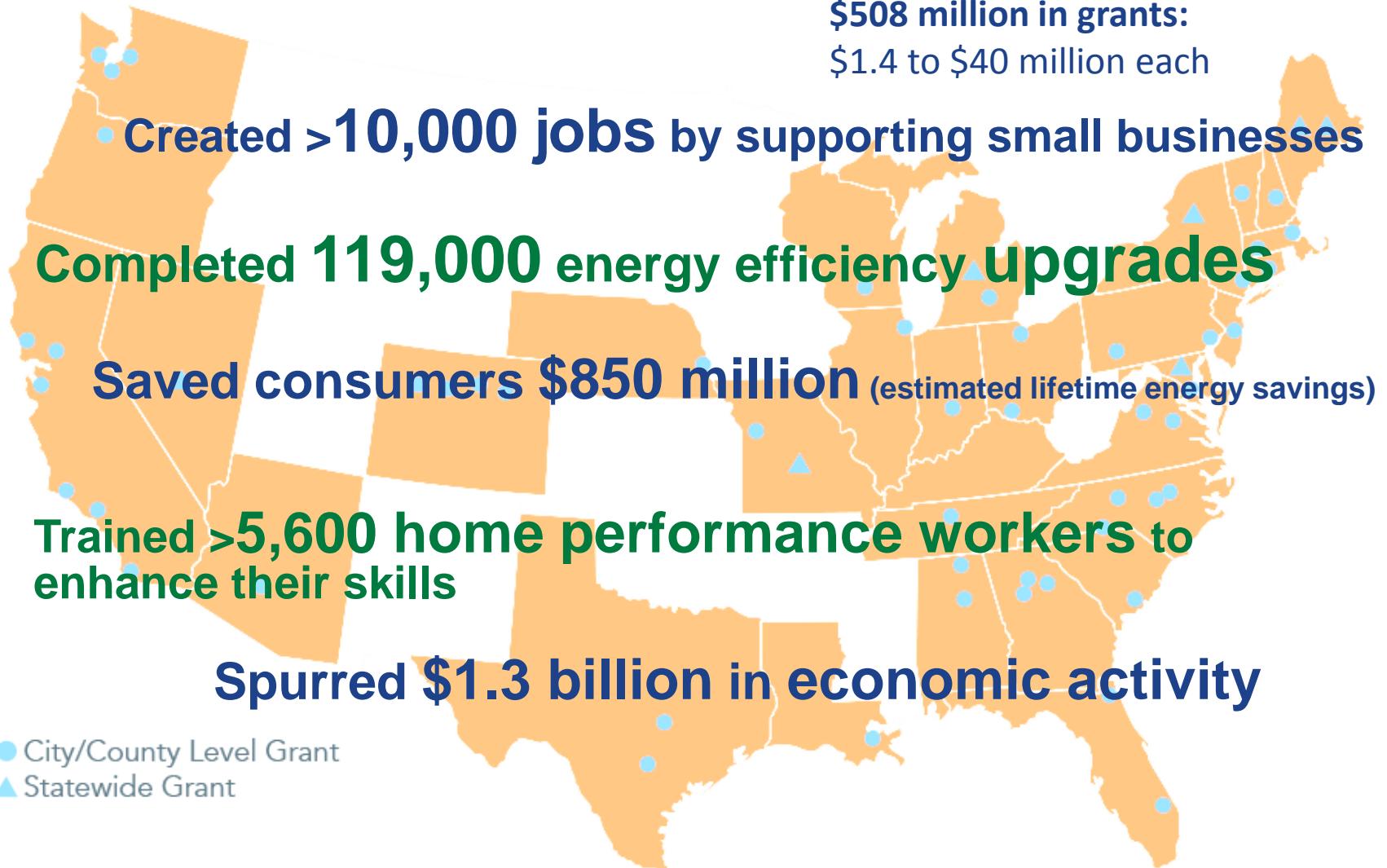


# Best Practices from the Better Buildings Neighborhood Program

Danielle Sass Byrnett

September 22, 2015

# Better Buildings Neighborhood Program



# BBNP Evaluation Report: 12 Best Practices

-  1. Offer multiple types of energy assessments
2. Directly install measures during the energy assessment
3. Provide a flexible approach to conduct comprehensive upgrades
4. Keep the program simple for your customers
-  5. Provide multiple types of training to contractors
6. Develop large pools of eligible contractors
7. Foster relationships with contractors
8. Conduct effective QA/QC

# BBNP Evaluation Report: 12 Best Practices (cont.)



9. Have at least one staff member with 15+ years of relevant experience



10. Tailor outreach activities to target populations, but don't restrict participation



11. Offer financing as a component of the program

12. Offer incentives at ~25% of project costs

# #1: Offer multiple types of energy assessments



- Successful programs offered multiple assessment types to match market characteristics.
- Ensured that homeowners with varied upgrade needs, time, and finances could participate.



## EnergySmart, Boulder, CO

- Offered a range of options: phone consultation, walk-through assessment, and in-depth assessment.
- Energy advisors were available for all options & developed relationships with participants.

# #3: Provide a flexible approach to conduct comprehensive upgrades



- Allowing flexibility in types of assessments & upgrades ensured that homeowners with varied upgrade needs, time constraints, & financial limits could participate.
- Offering well-designed prescriptive options did not decrease the average comprehensiveness of upgrades.

## Los Angeles County, CA



- Designed a Flex Path for homeowners not able to commit substantial time and resources.
- Assigned points to measures. Homeowners qualified for a rebate by installing  $\geq 2$  measures totaling 100 points.

# #5: Provide multiple types of training to contractors



- Successful programs provided training on program requirements, business development, sales skills, and building science.
- Use appropriate channels for your contractors: classroom training, on-site trainings, webinars, & peer-to-peer networking were all effective.

## Efficiency Maine

- Helped contractors improve their skills in selling program options with training.
- After conducting a two-day sales training course, average monthly conversion rate increased from 10% to 60%.



# #10: Tailor outreach activities to target populations, but don't restrict participation



- Many grantees collaborated with community-based organizations (CBOs) to recruit participants.
- CBOs were a channel for targeted outreach & served as trusted messengers, increasing program credibility.

## NOLA WISE



- Collaborated with CBOs to conduct outreach, drive demand, and stimulate supply of efficiency contractors.
- Worked with Neighborhood Associations to host homeowner showcase events.

# Access the Solution Center: [energy.gov/rpsc](http://energy.gov/rpsc)

The image shows the Better Buildings Residential Program Solution Center website on the left side. The website features a navigation bar with links to Energy Efficiency & Renewable Energy, EERE, and BESD. Below this is the main title "Better Buildings Residential Program Solution Center". The page includes a sidebar with links to About, Handbook Index, Energy Data Facts, Glossary, and Program Components. The main content area displays "Access Program Component Handbooks" with icons for Market Position & Business Model, Program Design & Customer Experience, Evaluation & Data Collection, Marketing & Outreach, Financing, and Contracting & Workforce Development. A large section titled "Explore Program Design Phase Resources" is also visible. On the right side, there is a process flow diagram illustrating the program cycle: Strategy Development (target icon), Planning (person carrying a plan icon), Implementation (checklist icon with a magnifying glass over a house icon), and Evaluation (magnifying glass over a house icon).

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# Welcome to the Residential Program Solution Center!

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## Better Buildings Residential Program Solution Center

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- Program Design Phases
- Content Types

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Keep the program simple for customers and contractors.  
Foster "word of mouth" communication from early adopters.  
Recognize good contractor performance.  
Consider tiered financing to encourage deeper upgrades.

Learn from Successful Programs

Tips for Success provide a compilation of lessons learned, related to the planning, implementation, and evaluation of residential energy efficiency programs.

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graph TD; A[Market Position & Business Model] --> B[Program Design & Customer Experience]; A --> C[Evaluation & Data Collection]; B --> D[Marketing & Outreach]; B --> E[Financing]; B --> F[Contractor Engagement & Workforce Development]
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A man and a woman in hard hats looking at a tablet with a speech bubble saying "Tell me more".

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THIS MONTH'S SHORTCUTS

- What are the benefits and considerations of different business models?
- How do I plan for ongoing coordination and feedback with contractors?
- What can I do with evaluation results?

# Handbooks – Step-by-Step

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

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

[Where Am I?](#) [Subscribe](#) [PDF of handbook](#) [Print handbook](#)

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

### Step-by-Step

There are several steps to making final design decisions for your residential energy efficiency program.

[Expand All](#)

- ▶ Select your target market(s)
- ▶ Identify barriers to overcome
- ▶ Select your products and/or services
- ▶ Determine how you will deliver services
- ▶ Select and design key programs
- ▶ Get feedback on your program

▼ Select your target market sector(s)

A key design decision is identifying what market sector or sectors your program will focus on. Identifying target market sectors requires considering the market opportunity (i.e., where there is an unrealized opportunity for residential energy efficiency improvements) and where your organization and partners can effectively add value to the market. Your [market assessment](#) and your [business plan](#) may already have helped narrow the options for target markets. Your work on marketing and outreach may also have identified market segments on which to focus. To the extent that you need to further define your market sector, the questions below will help.

**What housing sector(s) will you focus on?**

Residential energy efficiency programs can address single-family, multifamily, or manufactured homes, or a combination of them. Programs can focus on homeowners, renters, or both. Your market assessment should have determined where the key opportunities are and what housing sector focus has the most potential to help you achieve your goals.

Your choice of sectors will influence your program design. For example, if you are focused on multifamily rental buildings, you will need to encourage both owners and tenants to pursue upgrades. If you are focused on newer manufactured homes you will need to offer different types of home performance improvements than if you are focused on older single-family homes.

# Handbooks – Tips for Success

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

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

Where Am I? PDF of handbook

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

## Tips for Success

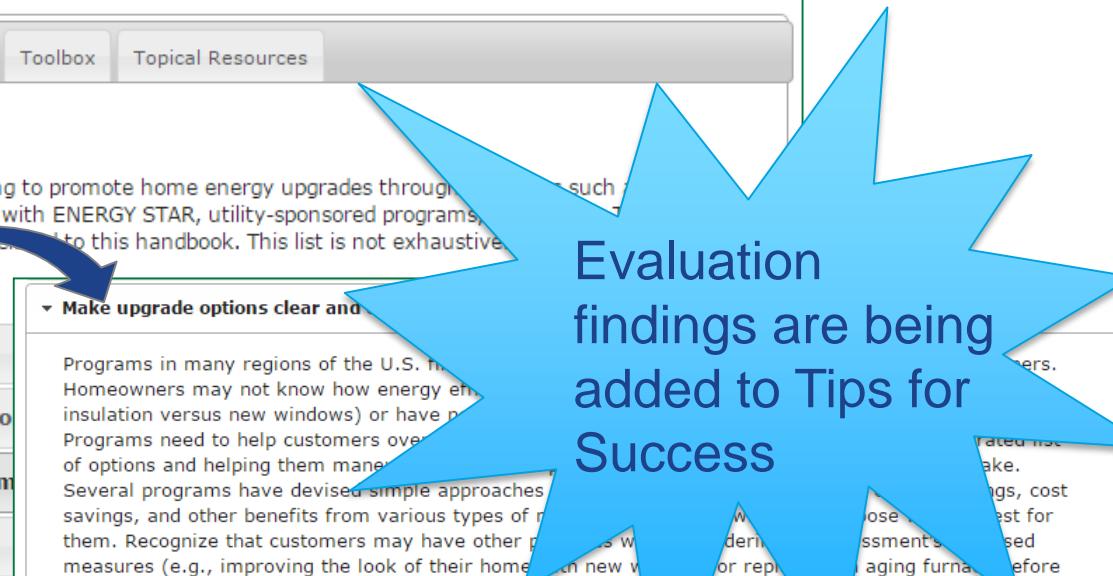
In recent years, hundreds of communities have been working to promote home energy upgrades through the Better Buildings Neighborhood Program, Home Performance with ENERGY STAR, utility-sponsored programs, and other programs. These tips present the top lessons these programs want to share related to this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

- ▶ Keep the program simple for your customers
- ▶ Provide customers with a single point of contact to make it easy for them to get started
- ▶ Make upgrade options clear and concise for customers
- ▶ Keep the program simple for your contractors
- ▶ Make sure there are enough customers in your target market
- ▶ Emphasize the action you want your customer to take
- ▶ Develop partnerships based on an alignment of goals
- ▶ Provide adequate time for data system development

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

Programs in many regions of the U.S. have found that homeowners may not know how energy efficient insulation versus new windows) or have no idea what type of options are available. Programs need to help customers over come these challenges by providing clear information about the types of options and helping them make informed decisions. Several programs have devised simple approaches to help customers understand the potential savings, and other benefits from various types of measures. Recognize that customers may have other priorities when it comes to making improvements (e.g., improving the look of their home, or new windows). Encourage them to consider the cost of the measure, cost savings, and other benefits before making a decision.

- [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.
- [BetterBuildings for Michigan](#) provided customers with a "base package" that included an energy assessment, direct installs of compact fluorescent light bulbs and water saving devices, and basic measures like air and duct sealing. Customers could then choose to undertake additional measures (e.g., insulation, furnace replacement, etc.) in addition to the base package. The program found that



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# Handbooks – Examples, Toolbox, and Topical Resources

Case studies, program presentations and reports, materials from energy efficiency programs

## Contractor Engagement & Workforce Development – Make Design Decisions

Where Am I? PDF of handbook

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

**Examples**

The following resources are examples from individual residential energy efficiency programs, which include presentations and reports, and program materials. The U.S. Department of Energy does not endorse these

**Case Studies**

[A Business Case for Home Performance Contracting](#) (94 KB)  
**Author:** Pacific Northwest National Laboratory  
**Publication Date:** 2012  
*This report contains information on the market for home performance upgrades and the opportunities to work with contractors; start-up needs and costs for firms entering the home performance contracting business; performance business approaches; and how established home performance contractors attract customers. It includes detailed profiles of eight successful home performance programs across the United States.*

[Spotlight on Maine: Contractor Sales Training Boosts Energy Upgrade Conversions](#) (411 KB)  
**Author:** U.S. Department of Energy  
**Publication Date:** 2012  
*This case study explains how Maine provided contractor sales training to boost upgrade conversions.*

[Spotlight on Portland, Oregon: Making the Program Work for Contractors](#) (536 KB)  
**Author:** U.S. Department of Energy  
**Publication Date:** 2011  
*As a program charged with saving energy and supporting economic growth, Clean Energy Works Oregon*

**Workforce**

**Better Buildings Neighborhood Program U.S. Department of Energy**

**Spotlight on Maine: Contractor Sales Training Boosts Energy Upgrade Conversions**

**Key Takeaways**

- Make sure contractors have the skill sets they need, including sales and interpersonal skills, to help homeowners through the decision-making process
- Give contractors tools to learn homeowners' specific needs and determine their motivations when conducting assessments
- Support contractors directly or through other organizations to provide ongoing professional development

When Efficiency Maine launched a new residential tiered rebate program in January 2010, offering homeowners thousands of dollars to complete a home energy upgrade, program staff expected a tremendous response. Initial interest in the offering was high, with the program receiving 10,000 leads through its call center and website, but by June 2010, contractors had only completed 72 upgrades. Following efforts to ensure that contractors were equipped with the tools and training necessary to close a sale with homeowners, Efficiency Maine's assessment-to-upgrade conversion rate grew from 10% to 60%. Multiple approaches have assisted contractors in successfully selling home energy upgrades in Maine. Efficiency Maine has provided dedicated sales training, offers contractors a standard assessment checklist to help them communicate with homeowners, organizes monthly program webinars for contractors, and works with partners to continue offering professional development courses for contractors.

**Tailor Sales Training to Fit Energy Professionals**

In summer 2010, program managers began shadowing contractors on home visits in an effort to identify the source of the disconnect between leads and upgrades and, as a result, gained critical insight on why more homeowners were not upgrading their homes. The home performance contractors were focused on demonstrating their building science expertise, using technical language to describe energy efficiency issues they were finding in the home. Complex terminology often alienated homeowners, deterring them from undertaking upgrades and derailing the sales process. While program staff provided contractors with technical training, they realized that the contractors needed other training and tools to communicate effectively with homeowners.

Contractors are the primary point of contact during the residential energy efficiency upgrade process. They not only need skills in building science, but also in communicating with consumers and selling program options.

The Better Buildings Neighborhood Program is a U.S. Energy Department program that is improving lives and communities across the country through energy efficiency. To learn how the Better Buildings Neighborhood Program can make your community and businesses more successful and to read more from this spotlight series, visit [betterbuildings.energy.gov/neighborhoods](#).

In August 2010, Efficiency Maine decided to offer sales training to its participating contractors, as one approach to addressing its low conversion rates. The program conducted a nationwide search and selected Dale Carnegie Training, a professional skills training program with a strong presence in Maine. Recognizing that contractors did not want to think of themselves solely as salespeople, Efficiency Maine collaborated with Dale Carnegie Maine to customize its training model into a two-day course that blends selling

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# Handbook Index – 50+Handbooks

Explore by  
program  
component  
or program  
design phase

		Program Components					
		Market Position & Business Model	Program Design & Customer Experience	Evaluation & Data Collection	Marketing & Outreach	Financing	Contractor Engagement & Workforce Development
Program Design Phases	Overview	Overview	Overview	Overview	Overview	Overview	Overview
	 <b>Strategy Development</b>	<ol style="list-style-type: none"><li>1. <a href="#">Assess the Market</a></li><li>2. <a href="#">Set Goals &amp; Objectives</a></li><li>3. <a href="#">Identify Partners</a></li><li>4. <a href="#">Make Design Decisions</a></li></ol>	<ol style="list-style-type: none"><li>1. <a href="#">Assess the Market</a></li><li>2. <a href="#">Set Goals &amp; Objectives</a></li><li>3. <a href="#">Identify Partners</a></li><li>4. <a href="#">Make Design Decisions</a></li></ol>		<ol style="list-style-type: none"><li>1. <a href="#">Assess the Market</a></li><li>2. <a href="#">Set Goals &amp; Objectives</a></li><li>3. <a href="#">Identify Partners</a></li><li>4. <a href="#">Make Design Decisions</a></li></ol>	<ol style="list-style-type: none"><li>1. <a href="#">Assess the Market</a></li><li>2. <a href="#">Set Goals &amp; Objectives</a></li><li>3. <a href="#">Identify Partners</a></li><li>4. <a href="#">Make Design Decisions</a></li></ol>	<ol style="list-style-type: none"><li>1. <a href="#">Assess the Market</a></li><li>2. <a href="#">Set Goals &amp; Objectives</a></li><li>3. <a href="#">Identify Partners</a></li><li>4. <a href="#">Make Design Decisions</a></li></ol>
	 <b>Planning</b>	<ol style="list-style-type: none"><li>5. <a href="#">Develop Implementation Plans</a></li><li>6. <a href="#">Develop Evaluation Plans</a></li></ol>	<ol style="list-style-type: none"><li>5. <a href="#">Develop Implementation Plans</a></li><li>6. <a href="#">Develop Evaluation Plans</a></li></ol>	<ol style="list-style-type: none"><li>1. <a href="#">Develop Evaluation Plans</a></li></ol>	<ol style="list-style-type: none"><li>5. <a href="#">Develop Implementation Plans</a></li><li>6. <a href="#">Develop Evaluation Plans</a></li></ol>	<ol style="list-style-type: none"><li>5. <a href="#">Develop Implementation Plans</a></li><li>6. <a href="#">Develop Evaluation Plans</a></li></ol>	<ol style="list-style-type: none"><li>5. <a href="#">Develop Implementation Plans</a></li><li>6. <a href="#">Develop Evaluation Plans</a></li></ol>
	 <b>Implementation</b>	<ol style="list-style-type: none"><li>7. <a href="#">Develop Resources</a></li></ol>	<ol style="list-style-type: none"><li>7. <a href="#">Develop Resources</a></li><li>8. <a href="#">Deliver Program</a></li></ol>	<ol style="list-style-type: none"><li>2. <a href="#">Develop Resources</a></li><li>3. <a href="#">Conduct Evaluation</a></li></ol>	<ol style="list-style-type: none"><li>7. <a href="#">Develop Resources</a></li><li>8. <a href="#">Deliver Program</a></li></ol>	<ol style="list-style-type: none"><li>7. <a href="#">Develop Resources</a></li><li>8. <a href="#">Deliver Program</a></li></ol>	<ol style="list-style-type: none"><li>7. <a href="#">Develop Resources</a></li><li>8. <a href="#">Deliver Program</a></li></ol>
	 <b>Evaluation</b>	<ol style="list-style-type: none"><li>8. <a href="#">Assess &amp; Improve Processes</a></li><li>9. <a href="#">Communicate Impacts</a></li></ol>	<ol style="list-style-type: none"><li>9. <a href="#">Assess &amp; Improve Processes</a></li><li>10. <a href="#">Communicate Impacts</a></li></ol>	<ol style="list-style-type: none"><li>4. <a href="#">Communicate Impacts</a></li></ol>	<ol style="list-style-type: none"><li>9. <a href="#">Assess &amp; Improve Processes</a></li><li>10. <a href="#">Communicate Impacts</a></li></ol>	<ol style="list-style-type: none"><li>9. <a href="#">Assess &amp; Improve Processes</a></li><li>10. <a href="#">Communicate Impacts</a></li></ol>	<ol style="list-style-type: none"><li>9. <a href="#">Assess &amp; Improve Processes</a></li><li>10. <a href="#">Communicate Impacts</a></li></ol>

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# Quick Links

Select a Quick Link to see curated resources, including case studies, presentations, tools, calculators, templates, and more.

## Quick Links

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | All

### Branding

Branding is a way of presenting, behavior.

### Business Models

A business model is comprised of providing energy efficiency products (heating, ventilation, and air conditioning and others).

### Community Events

Community events allow for face-to-face sources.

### Community-Based Social Marketing

Community-based social marketing is behavioral psychology and communication.

### Competitions

Competitions and challenges aim to tap into people's competitive spirit.

## Quick Links Results

[Better Buildings Program: Brands & Websites](#)  (4 MB) 

Author: U.S. Department of Energy

Publication Date: 2011

*This presentation includes the brands, website addresses, and images for most of the Better Buildings Neighborhood Program partners.*

[Brand Standards Tool Kit](#)  (2 MB) 

Author: BetterBuildings for Michigan

Publication Date: 2010

*This branding guide was developed for BetterBuildings for Michigan staff so they can consistently use the program's look and feel, messages, and tone in marketing and outreach materials.*

Build Your Better Buildings Brand

[Presentation](#) 

Author: U.S. Department of Energy

Publication Date: 2011

*This webcast discusses how to build the national Better Buildings brand into your program's marketing/branding to enhance public communications and outreach efforts.*

### CURRENT SEARCH

Search found 29 items

[\(-\) Branding](#)

### FILTER BY CONTENT TYPE:

[Handbook \(19\)](#)

[Program Materials \(2\)](#)

[Program Presentations & Reports \(2\)](#)

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# Proven Practices

Monthly posts about lessons learned, program examples, videos, and helpful tips to take your program to the next level.



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**Host in-home events to jump-start outreach**  
  
**Tell me more**

## Proven Practices: Host in-Home Events to Jump-Start Outreach

Posted on July 21, 2015

Most residential energy efficiency programs eventually find themselves asking, [how can we jump-start our outreach to get better results?](#) Successful programs across the United States have used in-home events to make upgrade benefits visible by [showcasing completed projects and actual results](#). Attending tours of upgraded homes—especially the homes of trusted neighbors and friends—allows potential customers to see and hear firsthand from satisfied customers, talk directly to the contractors who performed the work, and ask questions or sign up with program staff to start the upgrade process.

A few proven practices to making upgrade benefits visible include:

### Show How Assessments Work

Energy Impact Illinois used "house parties" to build momentum for energy assessments and upgrades by leveraging the credibility of trusted neighbors who hosted contractors to show guests where energy was being wasted and explain ways to improve comfort while saving energy. Discover how [Energy Impact Illinois Learned That Parties Sell Upgrades](#).



### Hold House Tours

NOLA WISE (New Orleans, Louisiana Worthwhile Investments Save Energy) gave open house tours in the upgraded homes of happy clients. Signs throughout the house and the upgrade contractor highlighted the work that was completed and the associated energy savings.



### Invite the Whole Neighborhood

In Jacksonville, Florida, Shop Smart with JEA fostered community awareness with the Home Energy Makeover: Block Party. Homeowners who contracted with a local energy professional to receive a home energy assessment offered to host block parties for their neighbors, and the energy professional reviewed the assessment and upgrade process, discussed rebate options, and answered questions from friends and neighbors who attended the parties.



### Make Efficiency Personal

The California Center for Sustainable Energy (CCSE) provided demonstration tours in homes that completed upgrades in Chula Vista, California. Potential customers could learn about their neighbors' experiences, ask questions of the home performance professionals who installed the upgrades, and sign up for an energy assessment of their own home for less than \$50.

### Tell Me More

Discover more residential energy efficiency outreach tips by visiting the [Marketing & Outreach – Develop Implementation Plans](#) handbook for step-by-step instructions and program examples. Here you will find information on in-home outreach, as well as some of these other solutions:

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Solution Center Home: About, Handbook Index, Quick Links, Proven Practices, Energy Data Facts, Glossary, BROWSE BY: Program Components, Program Design Phases, Content Types.

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- What can I do with evaluation results?

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# Appendix

# How RIA defined “success”

- Based on BBNP’s objectives, identified 12 quantifiable performance metrics
- Quantified these 12 metrics for the residential programs of grantees and sub-grantees (n=54)
  - Captured diversity of program business models, outcomes, and market characteristics
- Clustered the grantees on the 12 performance metrics using Latent Profile Analysis
  - Most success (n=12)
  - Average success (n=35)
  - Least success (n=7)

# How RIA defined “success” (continued)

- Using regression analysis, explored which programmatic elements predicted membership in the most and least successful clusters
- Example of four metrics:

