Engaging the Homeowner to Learn about Energy Efficiency
1) INTRODUCTIONS
2) POLLING QUESTION
3) ROUND ROBIN QUESTIONS
4) SPEAKERS
5) Q&A
Panel

- **Jonathan Cohen**, DOE - Moderator
- **Devon Hartman**, Community Home Energy Retrofit Project
- **Diane Duva**, State of Connecticut
- **Beth Galante**, PosiGen
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
- Tools, templates, & resources
- Newsletter updates on trends
- Recognition: Media, materials
- Voluntary member initiatives
- Better Buildings Residential Program Solution Center

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

I. Name

II. Affiliation

III. Role
Polling Question

What sector do you work in?

- Local government
- State government
- Federal government
- Nonprofit
- Utility
- Business
Round Robin Questions

- What has been the best way to engage homeowners from your experience?
- What has been the worst way to engage homeowners from your experience?
What’s the best way to get an interested homeowner with resources to do an energy efficiency upgrade?
What are the barriers to engagement?
Engaging the Homeowner to Mainstream Energy Efficiency

CT DEEP, Eversource, United Illuminating, the Connecticut Green Bank, and the CT Energy Efficiency Board

May 2015
Mainstreaming Energy Efficiency Means Remove Barriers to Engaging Residents

- Energy Efficiency Awareness
- Financing
- Building maintenance status (health and safety)
- Engaged Resident
- Energy Efficient Homes
Today’s Focus: Increasing Awareness

Energy Efficiency Awareness

Financing

Engaged Resident

Building maintenance status (health and safety)

Energy Efficient Homes

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Increasing Awareness Means Engaging Residents through a Customer-Centered Culture

Know the Customer

Close the knowledge gaps

Customers’ Opportunities and Motives Vary

Customize tools for all demographics

Tailor the Message
## Know the Customer: Participant Profiling and Segmentation

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<th>Behavioral Data</th>
<th>Building Attributes</th>
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<td>Length of Residence</td>
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Opportunities and Motives Vary, Resulting in Varied Customer Segments

Customer Motivation

Building Potential

Opportunities for targeted bundles, messages, and for sales efficiencies

Current Residential Program Participant

Wants to participate, little opportunity in home

We could do even more with this resident

Lots of opportunity, little participation in energy efficiency

Source: Eversource, 2015
Tailor the Message Example
Better understanding of our customers through effective segmentation

- Segmentation is a continual process with ongoing refinement as learnings are identified
- Successful segmentation efforts are kept simple and highly actionable
Targeted Customer Segments Receive Tailored Messages and Bundled Products and Services via Varied Channels

- Families w/ Children & incomes > $100K
- Homeowners with 30% Plus Equity & SF < 2000
- Head of Household Age > 60
- Past Participants w/ no Deeper Measures
- Income < $50,000 Multi-Family Dwelling Unit

- Reduce Drafts
- Warmer Home
- Invest in Your Valuable Asset
- Save Money
- Still Time to Participate
- No Cost Solutions for Renters

Bundled Products and Services

- Email & Direct Mail
- Radio
- Print
- Magazines
- Newspaper
- Social Media

Safety First and Always
Example of Customized Comprehensive Product Bundles to Mainstream Efficiency for this Customer

**Comfort Seekers**

- Home Energy Assessment with Air Sealing
  - Stay Warmer
  - Reduce Road Noise

- Ductless Mini Split
  - Keeps you Cool in Summer

- LED
  - Better Quality Light
  - Dimmable

- High Quality Appliances

- Low Interest HVAC Financing is Easy

Efficiency financing means you can invest in efficiency *and* granite countertops

*energize CONNECTICUT*
Next: Changing Expectations Compel Customer Engagement Platform Development

Customers are becoming more... 

- knowledgeable
- demanding
- empowered

Benefits To Customers:
- Personalized experiences
- Targeted, Relevant recommendations
- 24/7 access to information
- Effectively bundled energy solutions
- Enhanced customer experience

Customer Engagement

Usage Data | Benchmarking | Recommendations
--- | --- | ---

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Next Level: Customer Engagement Platform

- Robust Data Warehouse
- Third Party Information
- Data Mining and Analytics
- Reporting Dashboards
  - www.ctenergydashboard.com

- Web & Mobile Interface
- Online Assessments
- Measure Fulfillment
  - www.EnergizeCT.com

- Campaign Management
- Sales Automation
- Electronic Rebate Status

Improved Overall Customer Experience

- Increased Energy Efficiency Program Participation
- Continuous Customer Engagement
What is the best way to accelerate the pace of residential upgrades, so a program can go from 0 to 1000 homes per year?
A Hyper-Local Solution to a Nasty Global Problem
Addressing the Barriers to Market Transformation

1. Education – (uncovering latent demand) in the Power and Benefits of Energy Efficiency

2. Quality Contractors – (supply the demand) for Public Satisfaction and Deep-Energy Retrofits
JUST THE FUN!
This house is CHERP-ting
House Number: 63
Claremont Home Energy Retrofit Project
ClaremontEnergy.org

My energy bills are lower
$
City-Wide Workshops
All processes are designed to be...

Replicable and Scalable
How are CHERP Initiatives selected?

Innovative, Replicable, and Scalable

Actual Energy Reductions for 2015-2016 against last 2 years.

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<td>Equitable Access across all groups and demographics</td>
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<td>Education</td>
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<td>Overall Quality and Success</td>
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75%
# Reaching the Entire Community

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**HUNDREDS OF VOLUNTEERS**

Pilgrim Place    Student Interns    K-12 students and teachers    260 CHERPers
50 Community Organizations
What makes CHERP different?

1. Hyper Local
2. Deep Education
3. Replication - now in 9 cities throughout California
4. Leveraging over 200 local volunteers (9 sub-committees, 10 Initiatives)
5. Public/Private Partnerships
6. 50 Organizations reaching their constituents with learning opportunities
7. 260 CHERPer households educating neighbors
8. K-12 Programs and Competitions
9. Pilgrim Place – CHERPers, Seniors, Retirement Communities
10. The Matrix
11. Realtor Mentoring
12. Walk the Town – Freeman, Civic Spark, Students, Orgs.
13. LED the Town
14. IdealPV – Claremont Locally Grown Power
15. Software to track all changes – HEA.com
16. CHERP Unity
17. Data Tracking – Hal Nelson CGU
Driving Energy Efficiency and Economic Recovery
Engaging the Homeowner to Learn about Energy Efficiency: Rapid Acceleration through Solar & Community-Based Marketing
May 28, 2015

Elizabeth Galante
Vice President of Business Development & Governmental Affairs
Mission

PosiGen’s mission is to help low-to-moderate income families achieve greater financial security and energy independence by lowering their utility costs.

We don’t just sell solar or energy efficiency - we deliver a positive financial impact in our customer’s lives.
Our unique approach allows those most in need of utility savings access to solar PV, thermal, and energy efficiency upgrades.

Our average customer reduces his or her monthly electric bill by 40% or more.

Savings guaranteed. Our customers will save more money than they pay in the first year following system installation.

Distribution of annual household income in the United States (2012 estimate)

PosiGen recognized the need to combine Solar with Energy Efficiency to maximize our customer’s savings.

By combining the two, PosiGen helps customers not only generate their own electricity with Solar, but also conserve that electricity through Energy Efficiency.

Solar and Energy Efficiency gives our customers a Powerful Combination.
The Scalable Approach

Solar PV & Energy Efficiency

All systems are the same size and are combined with proven energy efficiency measures to reduce the home’s utility energy usage an average of 12,000 kWh (LA) or 22,900 BTU (CT,NY) per year.

Standardization allows PosiGen to scale rapidly.
PosiGen is able to combine energy efficiency measures and solar systems to shield customers from volatile utility rates and result in monthly savings of up to 50% of utility costs. As shown in the table below, PosiGen’s customers reduce on average $125 per month from their energy bill, making it easy for them to afford their $65 monthly lease payment. Customers net saving = ~ $60 per month or $720 per year.

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<th>Solution</th>
<th>Monthly Savings</th>
<th>Annual Savings</th>
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<td>Solar Rooftop</td>
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<td>Total Savings</td>
<td>$125</td>
<td>$1,500</td>
</tr>
</tbody>
</table>
Demonstrated Commitment to Lower Income Communities

Customers
- 75% of PosiGen 6500 + installs are located in Census tracts with Area Median Family Income below 120%
- 92% of our customers identify as Black or African-American; 65% are female
- 75% of our customers have monthly household incomes below $50K
- A typical customer’s utility bill is reduced by more than $1,200 per year
- 58% of new sales are referrals from our customers

Careers
- Median salary is 300% of Louisiana minimum wage
- 40%+ of workforce consists of employees who reside in communities with household incomes below the state median

Community
- PosiGen customers inject an aggregate average of $7.2 million per year back into the local economy in addition to our payroll multiplier of $10 million for a total community economic impact of $17.2 million per year
- Donation of solar systems to community - United Way (valued at $75,000) and the Mary Queen of Vietnam Church
- PosiGen identifies 5 disadvantaged homeowners each quarter whose energy efficiency needs exceed their payment ability, and perform deep dive upgrades out-of-pocket
Engaging the Homeowner to Learn About Energy Efficiency: How To Rapidly Scale A Market

Make It:
• Pocketbook
• Sexy
• Simple
• Fast
• Affordable
• Trustworthy
• Local
Engaging the Homeowner to Learn About Energy Efficiency: How To Rapidly Scale A Market

- **Pocketbook**: Speak in Monthly terms, not Annual
- **Sexy**: Solar!
- **Simple**: Go for Amazon, not Advanced
- **Fast**: 2 Visits, 2 Weeks
- **Affordable**: Performance, NOT Perfection
- **Trustworthy**: Positively Outrageous Service
- **Local**: Let Your Customers & Community Sell
Engaging the Homeowner to Learn About Energy Efficiency: How To Rapidly Scale A Market

New Orleans: Top 10 Solar City In U.S. by end of 2014
• 36 MW installed = 10th in U.S. and 94 Watts per Capita = 6th in U.S.
• 1 residential solar PV system per 53 city residents.
• 3000+ solar homes = 3000+ energy efficiency upgrades
• 2014 Energy Star Partner of the Year Award – 64% PosiGen homes

Your Company/Your Community: Depth vs Breadth Choice
• Better Buildings Program = Deep Dive Retrofits
• BBP Conversion Rates = Majority of Homeowners Untouched
• BPP Future Opportunity = ?
OR
• PosiGen Model = Light Retrofit, Target 15%
• PosiGen Conversion Rates = 90% Conversion Rate
• PosiGen Future Opportunity = Outstanding

What Do You Want for Your Community?
PosiGen Installations in New Orleans Metropolitan Area

Legend

Installs

USA Median Household Income (Mature Support)
Median Household Income
Block Groups
- More than $82,000
- $68,001 to $82,000
- $53,001 to $68,000
- $39,001 to $53,000 (US median: $50,157)
- $24,001 to $39,000
- $24,000 or less
- No households
“You never change things by fighting the existing reality.

To change something, build a new model that makes the existing model obsolete.”

— R. Buckminster Fuller

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