In Concert: Orchestrating the Energy Efficiency Message

Wednesday
11:15 am
Panelists

- Doug Miller, Rocky Mountain Institute
- Lauren Brois, Energize New York
- Derek Mills, Entergy NOLA
- Madeline Salzman, DOE
How professionals can grow and capture the U.S. home performance market using a consumer-centric approach

Better Buildings Summit, 17 May 2017

Doug Miller
Putting the homeowner front-and-center for solutions to unlock the home performance market

A snapshot about RMI’s Residential Energy+ initiative for the U.S. residential sector and major opportunities for home performance professionals to enter this market
In partnership with industry leaders, RMI is deploying **mutually-reinforcing market interventions nationwide with a consumer-centric approach** to empower homeowners to invest in energy upgrades and unlock the U.S. residential energy upgrades market.

**Popularize and visualize the “problem”**

Boost the financial, social, and emotional appeals for home energy upgrade investments using mainstream industry and media channels.

**Greater Industry Coordination (+)**

**Deliver an attractive, easy solution**

Streamline the energy upgrade investment process with financing to make them desirable.

Share with @RockyMtnInst how you are inspiring and simplifying U.S. home energy upgrade investments
Entering the home performance market with a consumer-centric approach

Home performance professionals can **grow and capture the home performance market by targeting the major points of homeowner attrition** throughout the home energy upgrade investment process—focusing on ways to make investments more appealing and easier.

### Early Stage Attrition Points

- Awareness of (meaningful) benefits
- Perception of home performance
- Competition for time and attention
- Right-timing of investment

### Later Stage Attrition Points

- Decision for which upgrades to do
- Decision for which contractor to use
- Agreement over scope and price
- Availability of financing
- Quality assurance
- Showcasing the results

*Share with @RockyMtnInst how you are inspiring and simplifying U.S. home energy upgrade investments*
How contractors can better engage with homeowners

How home performance professionals can better engage with homeowners using proactive word-of-mouth marketing tactics to inspire increased home energy upgrade investments

Download RMI & BPI’s report via
www.rmi.org/pdf_peer_diffusion

Download the accompanying checklist via
http://info.rmi.org/peer_diffusion_checklist
Finding a common thread across promising residential sector developments

An opportunity emerged after RMI came across a number of real-world examples over a short timeframe highlighting the **important role of social interaction and social comparison** in home improvement investment decisions.

- Opower’s “Home Energy Reports”
- SolarCity’s finding about residential solar “contagion”
- Renovate America’s “HERO Program”

Share with @RockyMtnInst how you are inspiring and simplifying U.S. home energy upgrade investments
Expanding the residential industry’s use of “social” tactics

Home performance professionals have an opportunity to better engage with homeowners through word-of-mouth marketing and expand homeowners’ investment motivations in order to unlock energy upgrade investments.

**Peer Diffusion** = a form of communication within and between networks of people that

1. Occurs through varying forms of social comparison and social interaction around an innovation (i.e., a new behavior, idea, or technology), and
2. Ultimately promotes the broader adoption of that innovation – in this case, home energy upgrades.

Share with @RockyMtnInst how you are inspiring and simplifying U.S. home energy upgrade investments
Specifying peer diffusion tactics to help promote energy upgrade investments

Home performance professionals can **promote greater social interaction and social comparison** around home energy upgrades within and between their customers’ peer networks by using a robust peer diffusion strategy across project phases.

<table>
<thead>
<tr>
<th>Platform</th>
<th>Project Phase</th>
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<tr>
<td></td>
<td><strong>Pre-Retrofit</strong></td>
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<td><strong>Online</strong></td>
<td>Social media-promoted events,</td>
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<td>project idea and drawing board</td>
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<td>platforms, and referral</td>
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<td><strong>In-Person</strong></td>
<td>Group energy assessments and community leader engagement</td>
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<td><strong>Mid-Retrofit</strong></td>
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<td>Shareable photo timelines</td>
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<td><strong>Post-Retrofit</strong></td>
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<td>Online referrals, side-by-side photo comparisons, and showcasing benefits</td>
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<td>Celebratory events and home tours</td>
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Outlining possible pre-retrofit tactics

Home performance professionals can encourage more homeowners to get an energy audit, increase follow-through with recommended investments, and inspire homeowners to find ideas / interact with others about options for their own energy upgrades.

- Host group energy assessments (energy “house parties”)
- Engage with the broader community
- Create online drawing boards and join referral platforms

Share with @RockyMtnInst how you are inspiring and simplifying U.S. home energy upgrade investments
Outlining possible **mid-retrofit tactics**

Home performance professionals can demystify and celebrate home energy upgrades, increase the know-how of current and future homeowners, and bolster interest in residential energy industry employment.

Lead project field trips / site visits

Promote know-how at DIY workshops

Encourage use of online image-sharing platforms

Share with @RockyMtnInst how you are inspiring and simplifying U.S. home energy upgrade investments
Outlining possible post-retrofit tactics

Home performance professionals can help homeowners show off their energy upgrades and provide word-of-mouth referrals.

Create budget for post renovation parties

Partner with popular home tours

Post results on social media, contractor referral, and property listing platforms online

Share with @RockyMtnInst how you are inspiring and simplifying U.S. home energy upgrade investments
How real estate professionals can better engage with homeowners by helping buyer and seller clients identify where to start, what messages to use, which home energy upgrades can deliver the most value, and how to showcase these upgrades during property sales.
The following table summarizes the various ways for real estate professionals to help buyer and seller clients identify with home energy upgrade investments in order to further set themselves apart from their competitors.

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<th>Ways for Real Estate Professionals to Support Clients</th>
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<td>Better Message Value</td>
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<td>Inform Investment Process</td>
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<td>Showcase Completed Projects</td>
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<td><strong>Seller’s Agents</strong></td>
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<td>Better understand existing upgrades, promote benefits of upgrades to potential buyers</td>
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<td><strong>Buyer’s Agents</strong></td>
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<tr>
<td>Collect information for buyers, point out features during tours, explain the benefits of the upgrades, flag potential energy performance issues</td>
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Better messaging home energy upgrades to clients

Real estate professionals can better support buyer and seller clients by improving their understanding of home energy performance and energy upgrades, knowing the monthly utility costs and potential value of different energy upgrades, as well as communicating the comfort, health, safety, privacy, and durability benefits of these upgrades.

Seller’s Agents
- Better understand any energy upgrades sellers have made
- Ensure these upgrades are included in MLS listing, appraisal, etc.
- Encourage additional upgrades
- Talk about the upgrades and benefits to potential buyers

Buyer’s Agents
- Ask sellers about existing energy upgrades and monthly utility costs
- Highlight energy upgrade features during tours
- Explain why these upgrades matter
- Flag potential energy performance issues

Share with @RockyMtnInst how you are inspiring and simplifying U.S. home energy upgrade investments
Informing client investments on home energy upgrades

Real estate professionals can help clients figure out where to get started with the investment—such as identifying which upgrade(s) to make, a quality contractor, and different financing options.

**Home Energy Score or HERS Score**

Offer a HES/HERS assessment to clients (for free) to identify opportunities to improve home energy performance—and consider inviting clients’ friends.

[https://www.nachi.org/home-energy-score-real-estate-education-course.htm#stq=&stp=0](https://www.nachi.org/home-energy-score-real-estate-education-course.htm#stq=&stp=0)
[http://www.hersindex.com/](http://www.hersindex.com/)

**BPI Professionals**

Develop relationships with certified BPI professionals who can conduct HES/HERS assessment and deliver quality home energy upgrades.

[http://www.bpihomeowner.org/](http://www.bpihomeowner.org/)

**Financing**

- DSIRE database for incentives/subsidies (by zip code)
- Fannie Mae HomeStyle Loan
- PACE financing, on-bill financing, etc.

[http://www.dsireusa.org/](http://www.dsireusa.org/)
[https://www.fanniemae.com/singlefamily/homestyle-energy](https://www.fanniemae.com/singlefamily/homestyle-energy)
[http://www.pacenation.us/](http://www.pacenation.us/)

Share with @RockyMtnInst how you are inspiring and simplifying U.S. home energy upgrade investments
Showcasing completed energy upgrades for clients

Real estate professionals can help clients highlight home energy upgrades to increase property value and curb appeal—helping participating professionals gain a competitive advance and ensure that these investments result in improved commissions, closing times, and closing rates.

**MLS “Green Fields”**
Fill out “green fields” in MLS listings for sellers, ask about descriptions (or lack thereof) for buyers, include/ask for utility costs, and advocate for green field adoption in MLS


**Appraisal**
Submit documentation (i.e., Appraisal Institute’s Green Addendum), ensure proper appraisal, and encourage appraisers to get sustainability credentials


**Photos / Visuals**
Where allowed, include photos of energy upgrades, Green Addendum, before/after thermal camera images—plus stick a copy of Green Addendum inside electrical box

Share with @RockyMtnInst how you are inspiring and simplifying U.S. home energy upgrade investments
THANK YOU!

Doug Miller
Sr. Associate, Rocky Mountain Institute (RMI)

dmiller@rmi.org
Lauren Brois

Energize New York
Energize NY Homeowner Program

Better Buildings Summit 2017
In Concert: Orchestrating Energy Efficiency

Lauren Brois, Director, Energize NY Residential– Westchester
Who is Energize NY?

• Community-based energy savings program

• Helps building owners achieve energy efficiency and renewable energy benefits that save money and improve building quality through NYSERDA’s Home Performance with Energy Star

• Provides direct guidance, resources and PACE (Property Assessed Clean Energy) financing to commercial and not-for-profit building owners to facilitate energy improvements

• Operates within Energy Improvement Corp (EIC), a non-profit local development corporation with 37 member municipalities
Energize NY History

• Grant from DOE & NYSERDA - 2010
• Pilot program (Energize Bedford) launched - 2011
• Expanded to 14 Westchester communities - 2011-12
• Cleaner Greener & other grant funding - 2015
• Added select Southern Westchester communities – 2016
• Launched 3 Mid-Hudson Communities – 2017*

*NYSERDA Behavioral Demonstration Grant PON 2646 grant
Home Performance
(% of NY Statewide Projects in Energize Communities)

Red line is on par program performance by 1-4 housing stock
Completed Projects
In Energize NY Communities *

*includes New Rochelle starting in July 2016
The Community Value of Energize NY

Impact Across 14 Northern Westchester communities
(January 2011 to January 2017 UPDATE)

Completed Energy Upgrades – 1,189
  • Annual Homeowner Savings - $2,225,000
  • Annual kwH Saved – 731,235
  • Annual MMBTU Saved – 45,749
  • Total GhG Reductions (MTCO2E) – 108,739
  • Jobs Created – 278
  • Local Economic Activity - $15,057,000
Energize NY in Action

*Bringing the message and value of energy efficiency to the community*
The Energize Message

- Comfort and savings for your home can be achieved through energy efficiency.
- Message delivered through a community based neighbor-to-neighbor model to build trust in our program.
Energize Champions

• Volunteers in each community who deliver the Energize NY message
• Neighbor to Neighbor Model
• Focus on seeking out and staffing events and doing homeowner follow-ups.
• Collaborate on co-hosting and promoting local events
Homeowner Case Studies

Energize New York Case Study

"My investments in energy improvements including insulation and air sealing, and installing a high efficiency boiler resulted in dramatically reducing my all and electric bills."

Brian Kaminer - Armonk, NY
Year & Style: 1976 Colonial
Square Feet: 5,000
Bedrooms/Baths: 4 BR, 4.5 BA
Heat Source: Oil Boiler
Home Performance Contractors
Peter K Home Improvement
Green Star Energy Solutions
Fuel Oil Savings: 47%

Get your free home energy assessment today!
Visit us at: www.EnergizeNY.org or call (914) 302-7300

Energize NY Case Studies

Discover how Omar & Amy saved 18% on their gas usage.
Review this Case Study (PDF)

Discover how Peter Korn is saving $1200 per year on his energy bills.
Review this Case Study (PDF)

Discover how Rebecca Oling reduced her fuel oil usage by 27%.
Review this Case Study (PDF)

Discover how Brian Kaminer reduced his fuel oil usage by 47%.
Review this Case Study (PDF)

Learn how Mary Beth Kass is Energizing her home & community.
Review this Case Study (PDF)

Learn how Matthew Ryan achieved a fuel oil savings of 15%.
Review this Case Study (PDF)
Homeowner Testimonials

**Why your neighbors love Energize**

"It’s really quite possible to take an antique house and make it energy efficient"

*Josina van der Maas*

"No matter how small the improvements made, it all makes a difference.

*John Maddocks*

"I hope all Somers Homeowners will do what I did and get a free or reduced cost comprehensive home energy assessment."

*Mary Beth Murphy*

See all neighbor testimonials
Municipal Support

Inclusion in Municipal Communications
- Recreation Brochures
- Newsletters
- E-blasts
Municipal Support

Presence on Municipal Websites
Homeowner Recognition Events

- Homeowner Recognition Events held at Town Board Meetings
Building Trust in the Program

Vetted Contractors

• Energize Comfort Corps and Contractor Rating
• Customer Feedback Surveys
• Contractor Spotlights

Energize NY Comfort Corp List
Building Trust in the Program

The Energy Coach

• The Energize Coach is an independent, third-party energy expert

• Available to meet with homeowners
Customized Messaging

GET ENERGIZED!

Sign Up for a FREE Home Energy Assessment.

www.EnergizeSomers.org

ENERGIZE OSSINING
@ the Ossining Farmers Market on the 4th of July!

Energize Ossining is a non-profit organization, supported by the local community.

If your home is uncomfortably hot or costly to cool in the summer, consider signing up for a home energy assessment to diagnose your home's energy efficiency.

www.EnergizeNY.org - 914-392-7390

Celebrate the 4th of July with Energize!

SAVE MONEY
HOME ENERGY EFFICIENCY
GAMES FOR KIDS
REDUCE DEMAND FOR FOREIGN OIL
CONSERVE ENERGY

Come visit us at:
Ossining's Down to Earth Farmers Market
7/4 - 8:30am - 1:00pm
Customized Websites

What Energize NY offers

Our core mission is to help New York property owners waste less energy in their buildings.

Homeowners
We help you access programs that reduce energy waste and make your home more comfortable.

Energize helps you find a contractor, access incentives and answer your other related energy questions.

Residential property owners:
Find out more

Information is town-specific. Where do you live, vote and pay taxes?

new rochelle

New Rochelle City County: Westchester County
Customized Websites

Make your New Rochelle home energy efficient

What will an energy efficient home do for you?
- Make your home warmer in the winter and cooler in the summer
- Save money
- Increase the value of your home
- Reduce your carbon footprint

What the Energize NY program can do for you:
- Independent Contractor Ratings
- Find a contractor in your area
- Independent Energy Coach
- Meet the energy coach
- Case Studies
- See case studies in your area
- Guidance & Support
- Get help
- Commercial Financing Opportunities
- See options for New Rochelle

Sign Up (free) | Learn More

A Program of the City of New Rochelle

NEW ROCHELLE
IDEALLY YOURS

ENERGIZE NY
Comfort and Savings for Your Home
Local & Friendly Marketing Examples

31 Homes in Pound Ridge are Energized!

Get started on lowering your home energy bills, visit EnergizeNY.org or call 914-302-7300.
Energize Pound Ridge is a community based non-profit, guiding homeowners through NYSERDA's Home Performance with Energy Star Program.
If your kitchen’s filling with smoke while preparing Christmas dinner, your local Energy Coach suggests a new use for blower doors! 😋 Happy Holidays from the Energize Energy Coach, Norm Jen!
Is Drafty the Snowman living in your house?

Stop wasting money on high energy bills!
Sign up today at www.EnergizeCortlandt.org
Spring Cleaning Tasks!

- Repair gutters broken by those gigantic icicles!
- Change the direction of the ceiling fans to run counterclockwise.
- Sign up for a Home Energy Assessment with Energize NY
- Clean out that pile of stuff.

EARTH DAY 2014
TODAY I SIGNED UP FOR A HOME ENERGY ASSESSMENT
I pledge to lower my carbon footprint by reducing my energy bills!
The Dog Days of Summer are here!

Do your AC bills make you barking mad?

Sign up for a home energy assessment to get started on making your home energy efficient and less costly to operate in the summer!

energizeny
Mount Kisco, New ...

13 likes

energizeny Happy #NationalDogDay! 🐶️
These special family members know all about the warmest and coldest spots in their homes and greatly benefit from an energy efficient home. Energized pet Mr. Bojangles said “Ruff Ruff Bark Bark”. Our translator quotes Bo saying “I spend more time in our house than any other family member and am most pleased that my favorite spot on the tile floor in the kitchen is no longer drafty and ice cold during snowy winter days. Now I don’t even need my doggie sweater!” 🚪❤️️ #doggies #SaveEnergy #Comfort

jah_righteous Omg Bobi is so well-spoken
energizeny Don’t you know it @jah_righteous ! 😍
Vampires in your house?

Energy Vampires are electronic appliances that are constantly using energy – even when you think they are off. So unplug those energy-sucking vampires!

Go on a Vampire Hunt!

These vampires have telltale signs that can help you catch them. Some emit light, like DVD players, and others might make noise like a laptop. A few, like a cell phone charger, might even be warm to the touch.
My 2016 Green Resolution is to... 
more than 
Pick one specific home improvement from my home energy audit and implement it 
#Bedford2020
Create your own energy efficient house
Create your own energy efficient house
Online Resources
Reaching Residents Through Video
Thank You!

Lauren Brois
Energize NY
laurenb@energizeny.org
914-302-7300 ext. 8102
Agenda

- Introduction
- Who is Entergy New Orleans?
- What is Energy Smart?
- Home Performance with ENERGY STAR
  - Overview
  - Goals
  - Market barriers
  - Approach and outreach
  - Results
Who is Entergy New Orleans?

- Electric and Gas supplier to Orleans Parish
- 190,000 customers
- Regulated by the New Orleans City Council
What is Energy Smart?

- Energy Smart helps Entergy customers in Orleans Parish lower their utility bills.
- The program uses a whole-house approach to improving energy efficiency and comfort through home improvement rebates.
- Energy Smart is a comprehensive energy efficiency program developed by the New Orleans City Council, administered by Entergy New Orleans and implemented by CLEAResult.
What is Energy Smart?

- **Savings:** Earn valuable cash rebates for saving energy
- ** Choices:** Incentives are available for a wide range of energy efficiency improvements in your house, apartment or business
- **Ease:** Work directly with a participating contractor, who provides instant rebates on qualifying measures
- **Quality:** Energy Smart approves contractors and works with them closely to ensure the highest-quality work
What is Energy Smart?

- **Programs**
  - Free and discounted light bulbs
  - CoolSaver℠ A/C Tune-Ups
  - ENERGY STAR® A/C rebates
  - Mail-in rebates
    - Window air conditioners
    - Pool pumps
    - Advanced power strips
  - Assisted Home Performance with ENERGY STAR
  - Small Commercial
  - Large Commercial
Assisted Home Performance with ENERGY STAR

Citizens who need it most

- An integral part of the Energy Smart suite of programs
- Eligible household income can not exceed LIHEAP guidelines based on 60% of the estimated state median income
- Due to the extreme level of poverty in New Orleans, thousands of households qualify
Assisted Home Performance with ENERGY STAR

- Assessment is performed by participating energy consultants
  - Identify cost-effective improvements
  - Optional diagnostic tests measure air duct leakage
  - Identify rebates available through Energy Smart
- Work is done by participating contractors
  - Rebates are instant and contractors are reimbursed; no out of pocket costs to the customer
- Post work quality assurance is performed by Energy Smart
Assisted Home Performance with ENERGY STAR

- The program was a success from the start!!!
  - The initial savings goal in year 1 of 377,386 kWh was met after the first 9 months
  - Incremental goal of 535,364 kWh was set, and met for the remaining 3 months of the year
  - Primary measures installed were ceiling insulation, duct ceiling, and air sealing
Assisted Home Performance with ENERGY STAR

- But not without its challenges........
  - Prevalence of aging homes in New Orleans within the low income sector
  - Resident to contractor relationship post-Katrina
  - Program awareness
Assisted Home Performance with ENERGY STAR

- Prevalence of aging homes in New Orleans within the low income sector
  - Qualified housing stock was largely in unsatisfactory shape; beginning CFM readings reflect extreme leakiness
  - Many of these homes have poorly installed central air units; duct systems are either wrong size or disconnected/leaky or both
Assisted Home Performance with ENERGY STAR

- Prevalence of aging homes in New Orleans within the low income sector
  - To overcome these barriers and further assist the program, a $500 allocation was allotted to each home for repairs to ensure proper installation of energy efficient measures.
Assisted Home Performance with ENERGY STAR

- Resident to contractor relationship post Katrina
  - There was much skepticism following hurricane Katrina when it came to contractors, there were many instances of contractors taking advantage of customers during the rebuilding phase and word spread fast
Assisted Home Performance with ENERGY STAR

- Resident to contractor relationship post Katrina
  - To overcome this barrier, selected contractors were hand-picked after the vetting of all eligible contractors based on a number of criteria that included Building Performance Institute training by crew leaders and key personnel as well as strong relationships with New Orleans community members.
  - Vetting included having all required State Licensing; robust Insurance requirements; and either RESNET or BPI certified Crew Leaders; adherence to Entergy New Orleans’ marketing guidelines.
Assisted Home Performance with ENERGY STAR

- Program awareness
  - Program awareness was not widespread
  - Contractors played a key role here as well; they were integral in the success of broadening our footprint and reach across Orleans Parish
  - Contractors were armed with marketing materials leveraging the ENERGY STAR brand that helped to further instill strong customer confidence
    - Every opportunity given we identified the program with ENERGY STAR, leveraging its well known and positive brand awareness
    - Throughout the residents interaction with the program there were key points that brought to light the ENERGY STAR brand
Assisted Home Performance with ENERGY STAR

- Program awareness
  - Community outreach also played a key role through referral programs with local organizations like Project Homecoming, Rebuilding Together, Council on Aging, and the Lower 9th Ward Neighborhood Empowerment Network Association
  - This gave further legitimacy, and allowed for deeper reach into the community and overall a more impactful program
Assisted Home Performance with ENERGY STAR

Customers were happy😊

I was very happy with the energy program and all the work they did on my home. The insulation was absolutely and surely I couldn’t afford. I was very pleased with the workers and my home feels much better. My light bill has gone down.

Elaine Craft
Assisted Home Performance with ENERGY STAR

Customers were happy 😊

I am so glad they was able to help me. I am on fixed income and could never do this work. The guys did good work. My bills have gone down. Thank you so much for everything.

Mary Joseph
Assisted Home Performance with ENERGY STAR

Customers were happy😊

The work was good and they didn't leave a mess. My unit don't fire off like it use to. My bill has gone down and my home feels good now.

Elaine Joseph
Assisted Home Performance with ENERGY STAR

- Assessments: $77,000
- Safety Repairs: $38,000
- Air Sealing: $231,000; 718,000 kWh; 411 kW
- Ceiling Insulation: $579,000; 1,540,000 kWh; 416 kW
- Direct Installs & Room A/Cs: $34,000; 3,800,000 kWh; 8,673 kW
- Duct Sealing & Efficiency: $590,000; 2,428,000 kWh; 548 kW

- Totals: $1,552,000; 8,488,000 kWh; 10,048 kW
Questions?
Thank You

Provide feedback on this session in the new Summit App!

Download the app to your mobile device or go to bbsummit.pathable.com