



Better Buildings Residential Network Peer Exchange Call Series

Contractor Lists & Networks – What are Good Practices?

August 8, 2024

Agenda and Ground Rules

- Moderator
 - **Jonathan Cohen**, Better Buildings Residential Network, Residential Buildings Integration
- Agenda Review and Ground Rules
- Residential Network Overview and Upcoming Call Schedule
- Opening Poll
- Featured Speakers
 - **Seth Little**, CLEAResult
 - **Pat O'Boyle**, Michigan Saves
 - **Jason Darrow**, ICF
- Open Discussion
- Closing Poll and Announcements

Ground Rules:

1. **Sales of services and commercial messages are not appropriate** during Peer Exchange Calls.
2. Calls are a safe place for discussion; **please do not attribute information to individuals** on the call.

The views expressed by speakers are their own, and do not reflect those of the Dept. of Energy.

Better Buildings Residential Network

Join the Network

Member Benefits:

- Recognition in media, social media and publications
- Speaking opportunities
- Updates on latest trends
- Voluntary member initiatives
- One-on-One brainstorming conversations

Commitment:

- Members only need to provide *one number*: their organization's number of residential energy upgrades per year, or equivalent.

Upcoming Calls (2nd & 4th Thursdays):

- *9/12: New Contractor Resources – Decision Tools for Retrofits, Heat Pump Water Heaters, and Cold Climate Heat Pumps*
- *9/26: The Latest in Educating Homeowners on the Benefits of Energy Efficiency*

Peer Exchange Call summaries are posted on the Better Buildings [website](#) a few weeks after the call



Seth Little
CLEAResult



CLEAResult[®]

Trade Ally Management
Best Practices



ABOUT US

Our People Power Our Success.

2,400 strong with best-in-class
experts across the customer
journey



2,400+
Employees



200+
Technology Experts



100+
Marketing Experts



200+
Program Managers



400+
Energy Advisors
& Technicians



750+
Local Field Members



140+
Engineers



250+
Integrated Customer
Service Experts



OUR ENERGY EFFICIENCY EXPERTISE



60+

cities across **46 states**
and **8 Canadian**
provinces



1,650+

active energy programs



99%

customer retention in
last **5 years**



85%

clients with **10+** years
of relationship with



190+

utility
partners



750

residential
programs



250,000+

homes served
annually



600,000+

managed
DR devices



600+

clients



900+

C&I
programs



30,000+

Trade Ally Partners



300,000+

end use customers served
annually

CLEAResult®

In 2022



1B+

incentives processed through
programs we manage



3.8M+

rebates processed through our
customer service team



\$270M+

incentives paid through our
customer service team



Trade Ally Best Practices

Transitioning, Outreach & Recruitment

- ✓ Transitioning messaging & stakeholder engagement
- ✓ Trade Ally segmentation
- ✓ **Channel engagement**

Onboarding & Training

- ✓ System orientation and submission process
- ✓ Program rules and requirements
- ✓ **Installation Practices**
- ✓ Sales, marketing and Cross-promotion training

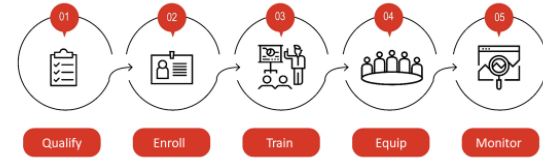
Systems, Tools & Support

- ✓ Partner Hub & Trade Ally Portals
- ✓ Customer & project verification
- ✓ **Energy Concierge**
- ✓ Application Support

Payments & Recognition

- ✓ **Speed to payment.**
- ✓ Incentive tracking and information requests
- ✓ LTO Bonuses
- ✓ Gamification

CR Transitioning, Outreach & Recruitment



- ✓ Provide clear messaging on the transition:
 - Sent from Utility, introducing new vendor and key contacts
 - Highlight minimal changes to existing incentives or program requirements;
 - Identify next steps for transition (i.e. Trade Ally to create profile on Partner Hub)
- ✓ Undertake Trade Ally Segmentation & Analysis:
 - Use Dun & Bradstreet Market Intelligence Technology and Geographic Information Systems (GIS) mapping to conduct market and spatial analysis for targeting non-participating trade allies
 - Use this data to identify and reach trade allies who have the greatest volume and customer satisfaction potential
 - As each program progresses, monitor the productivity (or lack thereof) of trade allies to guide outreach and support efforts
- ✓ Deliver direct outreach & recruitment activities:
 - Networking through utility staff (work with service managers, economic development, community/government relations, customer service staff to educate them on the program and engage them to help promote the program to the local communities they serve)
 - Channel engagement (work with Trade associations, chambers of commerce, industry events to publicize the program and recruit their members to join the network)
 - “Meet them where they are”
 - Screening/Qualification: automated checks that the trade ally is properly licensed, in good standing and maintains the required level of insurance.



Onboarding & Training

- ✓ Help Trade Allies understand the Program – ensure resources are available online and via printable reference material to help TA's navigate the program:
 - Participation Agreement
 - Training on project application and incentive payment process & procedures
 - Eligible measures and projects
 - Specific measure-related best practices
 - Project economics and financing training for key-decision makers
 - Training on the audit tool for accurate field use
- ✓ Provide toolkit of resources to promote and sell projects
 - Technology-specific one-pagers that outline potential benefits to the customer
 - Sales training and techniques including how to properly present assessment findings, num analysis, and payback opportunities to the customer, how to use a consultative approach gauge the customer's ability to proceed, how to ask process questions that helps the custo visualize and agree to the steps of the implementation process
 - Account Manager/Energy Concierge support
 - Sample social media posts and content
 - Options/path for co-branded materials
- ✓ Deliver ongoing training
 - Webinars/workshops, cross training on other Programs offered by utility
 - One-on-one training with TA Energy Concierge
 - People First, Buildings Second™ training to enhance trade allies' behavioral science skills and craft a customer-centric experience to fuel their continued energy efficiency journey

Sample Trade Ally / Field Outreach Marketing Toolkit

Small Business Lighting
Info Sheet



Rebate
Applications



Customer
Case Studies



Frequently Asked
Questions

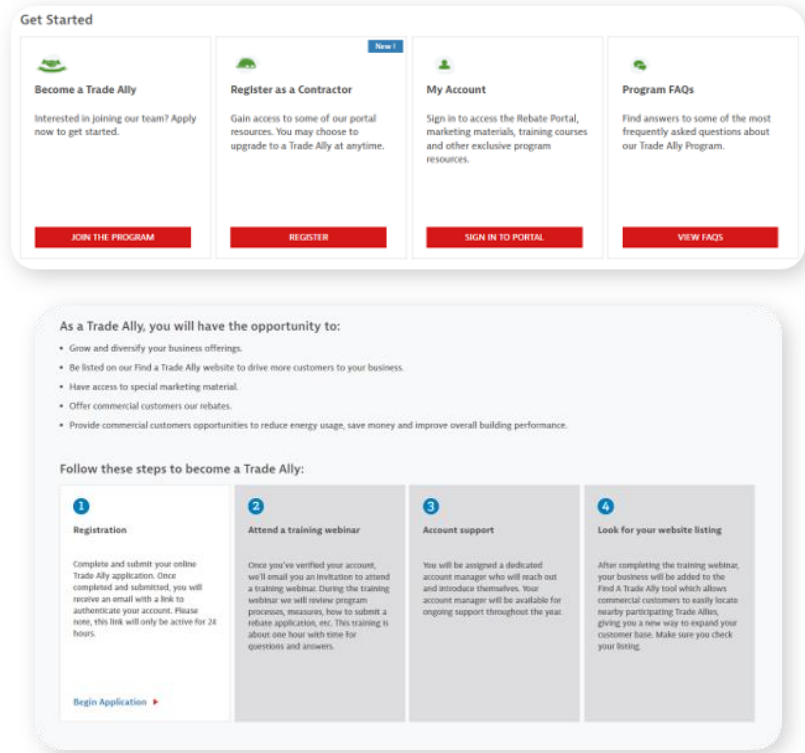
Measures
List



Systems, Tools & Support

- ✓ Provide a Trade Ally Partner Hub
 - One-stop location for all training and support resources, application submissions and status monitoring
- ✓ Offer Trade Ally Concierge Services
 - Dedicated support for TAs
 - One-on-one training on rules of engagement and how to present the program to the customer
- ✓ Monitor performance and offer support - In-field project assessment and partner outreach to ensure the trade ally presents the program to the customer professionally
- ✓ Offer application submission support that reduces administrative burden on Trade Ally and enables them to focus on selling and project implementation (in place of ongoing “rewards”)
- ✓ Segment TAs by measure category to enable specialization in Account Management & Energy Concierge support

Figure 2. Example of Trade Ally Partner Hub





Payments & Recognition

- ✓ Provide mechanisms for partners to track the status of their payment(s)
- ✓ Offer Limited time Only (LTO) bonuses to drive activity within a specific measure category and/or geographic location and/or specific time period
- ✓ Provide program marketing and collateral to bolster their credibility with customers (i.e. cobranded badges, vehicle magnets)
- ✓ Consider “gamification” approach to let Trade Allies know how they are performing compared to their peers and encourage friendly competition:
 - Quarterly/annual scoring of TAs based on the components in Figure 3
 - Annual score cards with rank
- ✓ Deliver Annual Trade Ally surveys to gauge TA satisfaction & continuously improve the program

Figure 3. Contractor Score Components

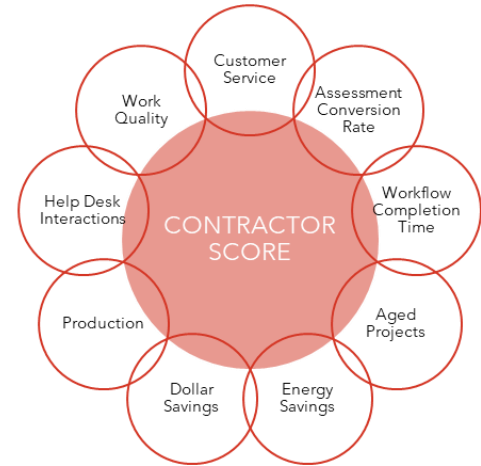
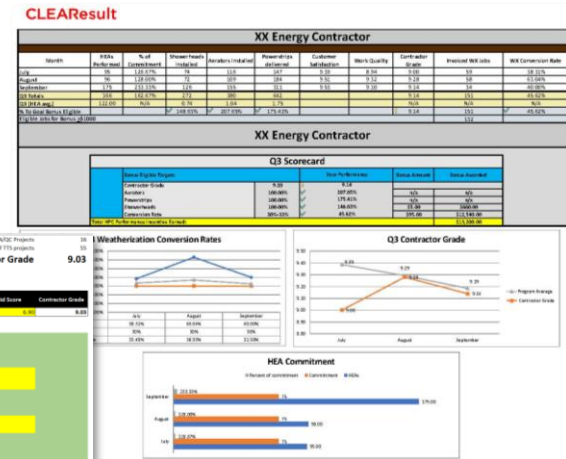


Figure 4. Contractor Score Cards





A Broader Reach Through Focus

- A long-term commitment
- Trade Allies are part of the communities we serve
- Listen and Value
- How can the program serve the businesses
- Impacts of design evolution
 - Workforce Development
 - Justice 40
 - Attribution and braiding/stacking





Pat O'Boyle
Michigan Saves

Michigan Saves

Contractor Lists & Networks – What Are Good Practices?

Pat O'Boyle – (517) 410-5924 - poboyle@michigansaves.org

August 2024

MichiganSaves.org

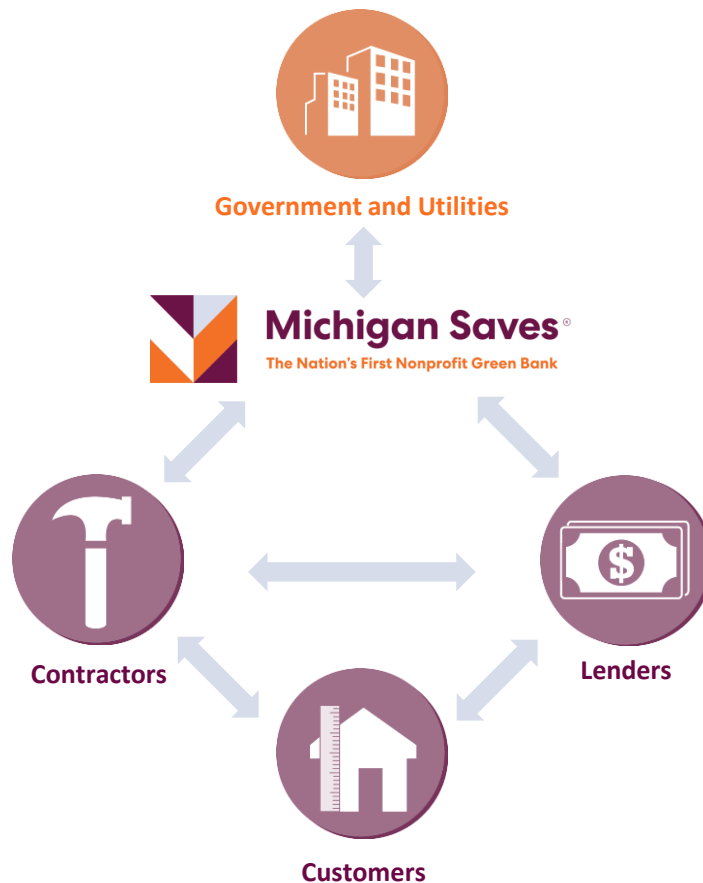


Michigan Saves SM



What Is Michigan Saves?

- Incorporated as a nonprofit corporation in 2009; supported first loan in 2010
- Provides a publicly funded credit enhancement, known as a loan loss reserve, for lenders
 - Leverages private capital at a rate of at least \$30 to \$1
- Maintains a network of authorized contractors
- Manages a transactional process that connects customers, contractors, and lenders
- **Offers tech-enabled deal flow and job management**



Authorized Contractor Eligibility

- Registered and in good standing with the State of Michigan Corporations Division
- Maintain minimum levels of insurance as outlined in program guide
- Contractors must maintain any required licenses
- Attendance at required training(s)
- Read and agree to terms and conditions outlined within the Michigan Saves Contractor Agreement and Implementation Guide, **including the Michigan Saves' vendor fee, which is 2.49 percent of the financed amount**

Recruitment, Retention and Resources for Contractors

Relationships to manage

- Contractors
- Utilities
- Municipalities (Ex. Ann Arbor)
- Workforce Development Partners
- Non-profit Partners
- Distributors
- Realtors

Methods of engagement

- Contractor Breakfasts
- Utility Events
- Distributor Events
- Contractor Office Visits
- Covid Calls
- NGEN portal

Timely Communication is Key

- Phone Calls
- Text Messages
- Discussion Messages
- Email



MARKETING MATERIALS
FOR PROSPECTIVE
CUSTOMERS



SUPPORT FROM THE
MICHIGAN SAVES
OUTREACH TEAM



REQUIRED FORMS AND
PROGRAM MINIMUM
STANDARDS



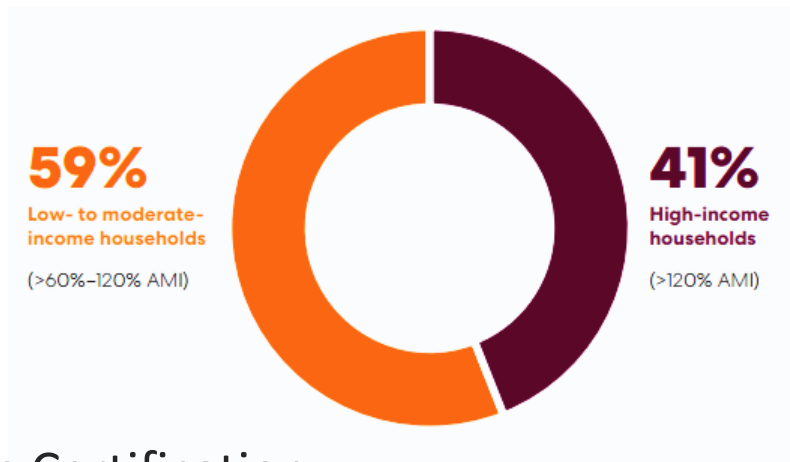
TIPS FOR TALKING
ABOUT FINANCING
WITH YOUR
CUSTOMERS



DEDICATED WEBSITE
MichiganSaves.org

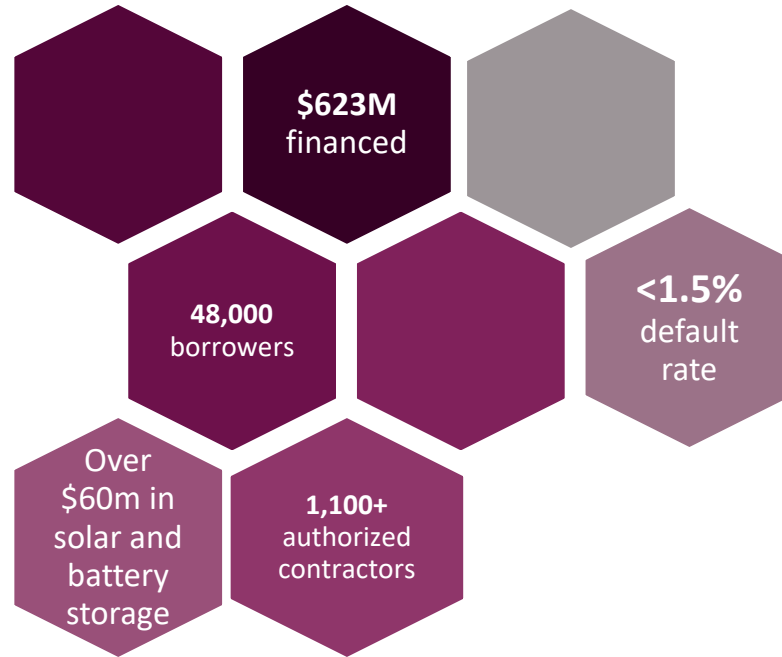
Unsecured Loans: Accessible in Low- to Moderate-income Communities

- More than half of Michigan Saves residential financing flows toward households with the highest energy burdens



- Diverse Business Certification

Michigan Saves by the #'s



Outreach Team!



Katie Rose

Customer Service Representative
info@michigansaves.org



Pat O'Boyle

Director of Business Development
poboyl@michigansaves.org



Chrissy Mancogna

Customer Service Representative
info@michigansaves.org



Mac McCabe

Outreach
Mmccabe@michigansaves.org



Bob Foster

Outreach
Rfoster@michigansaves.org



Todd O'Grady

Director of Outreach
togrady@michigansaves.org

Thank you.

MichiganSaves.org

 facebook.com/MichiganSaves

 [@MichiganSaves](https://twitter.com/MichiganSaves)

 Linkedin.com/company/Michigan-Saves/

517-484-6474

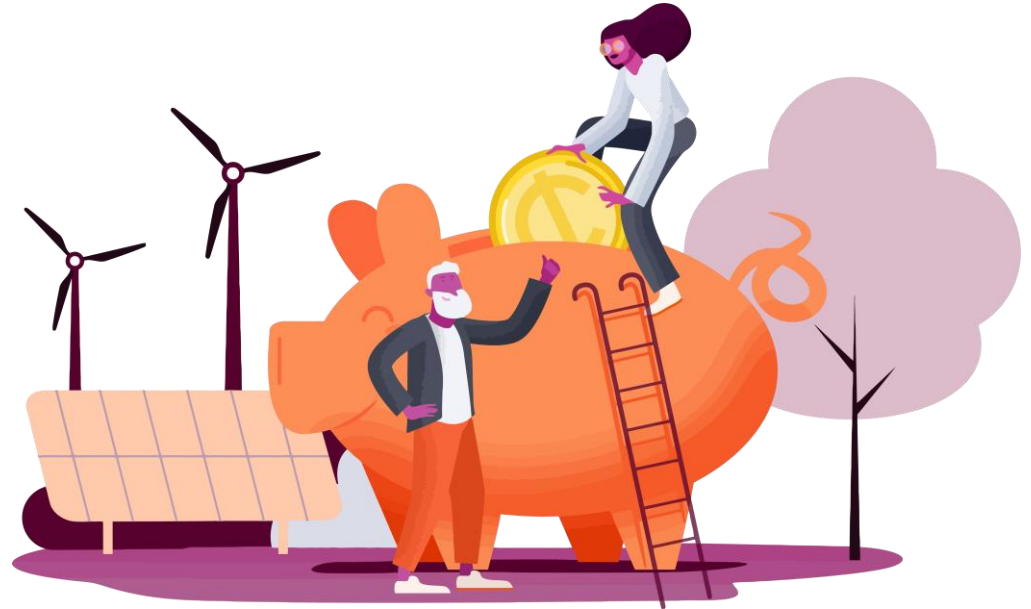
info@michigansaves.org

Subscribe to our newsletter:
MichiganSaves.org/smartenergy



Michigan Saves®

The Nation's First Nonprofit Green Bank





Jason Darrow
ICF

Contractor Lists & Networks – What Are Good Practices?



Strategies for Building Effective Contractor Networks



Jason Darrow

Senior HVAC Technical Specialist

8/8/24

Jason.Darrow@icf.com

Introduction

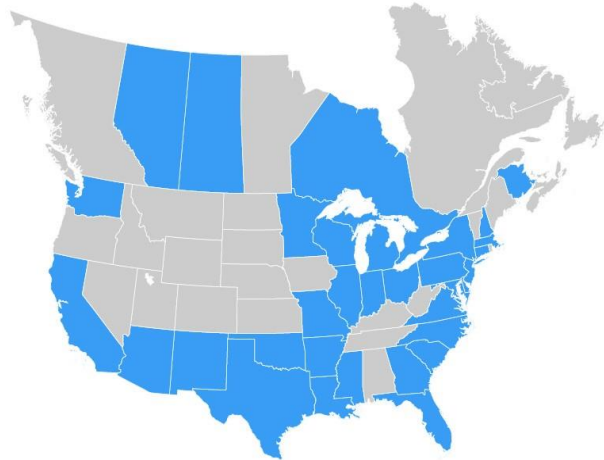


Senior HVAC technical specialist at ICF.

ICF is a consulting agency specializing in energy efficiency programs, supporting utilities and contractors to achieve better energy savings.

I'll be covering the importance of contractor networks, our approach to building these networks

ICF Delivers Energy Efficiency Programs Across the U.S.



- ACE
- AEP Texas
- Ameren Missouri
- Avangrid
- BGE
- CenterPoint Energy
- Central Hudson
- City of Edmonton
- City of Toronto
- Columbia Gas of Ohio
- ComEd
- ConEdison
- Consumers Energy
- Delmarva Power & Light
- Dominion South Carolina
- Dominion Virginia
- DTE Energy
- Duke Energy
- El Paso Electric
- Entergy Arkansas
- Entergy Corporation
- Entergy Mississippi
- Evergy
- Eversource
- FOE Wisconsin
- GasNetworks
- Georgia Power
- Hydro Ottawa
- IESO
- JEA
- Liberty Utilities
- Mass Save
- National Grid
- NB Power
- NMGC
- NYCEDC
- NYSEDA
- Oncor
- Ontario Ministry of Northern Development and Mines
- Orange & Rockland
- Pepco Holdings
- PNM
- PPL
- PSE&G New Jersey
- PSO
- Rockland Electric
- Salt River Project
- SaskPower
- SCE
- Seattle City Light
- SEMCO
- SMECO
- SMUD
- SoCalGas
- SoCalREN
- Spire Energy
- TNMP
- WGL Energy
- Xcel Energy

- Key points to be covered in the presentation

- Importance of contractor networks
- approach to building contractor networks
- Participation agreements
- Organizing and supporting contractors
- Inclusion of small and minority contractors
- Training programs





Importance of Contractor Networks

Types of Contractors that benefit from Networks

HVAC
Contractors



Building
Science
Contractors



Impact on
Energy
Savings

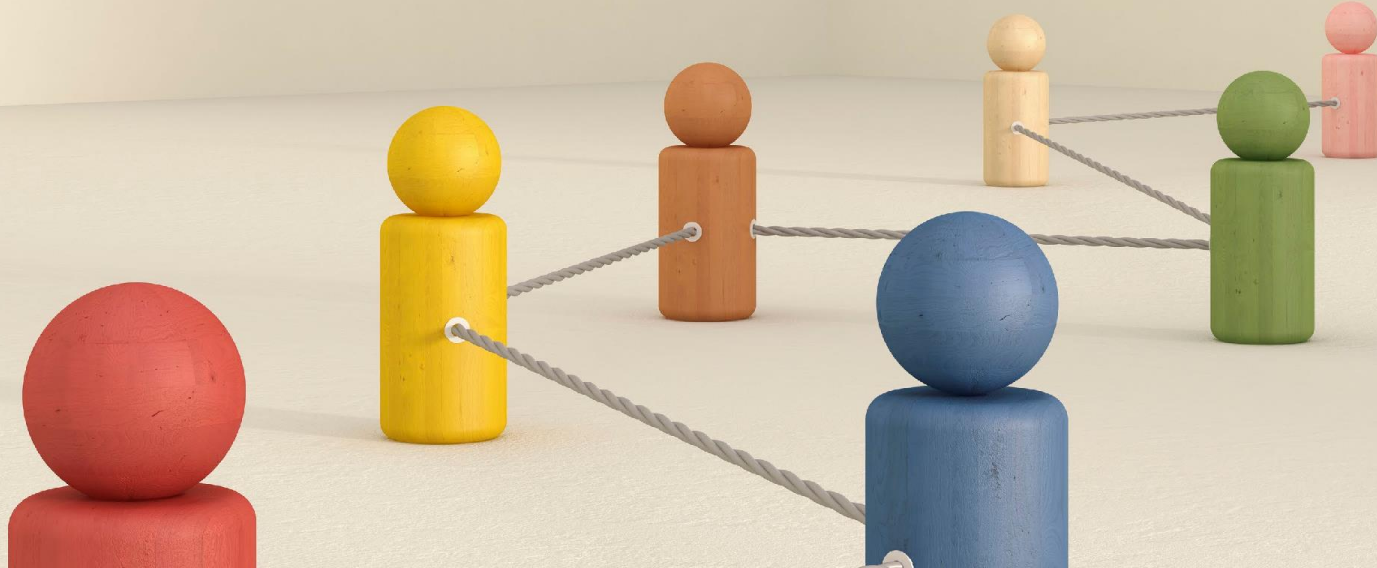
ICF's Approach to Building → Contractor Networks

Identifying and
Recruiting Skilled
Contractors

Establishing Minimum
Standards for
Participation

Developing and
Maintaining
Comprehensive
Contractor Lists

Providing Technical
and Operational
Support



Participation Agreements are Key



Criteria for Participation

- ensure that contractors meet the program's standards. These criteria outline the necessary qualifications, experience, and performance expectations

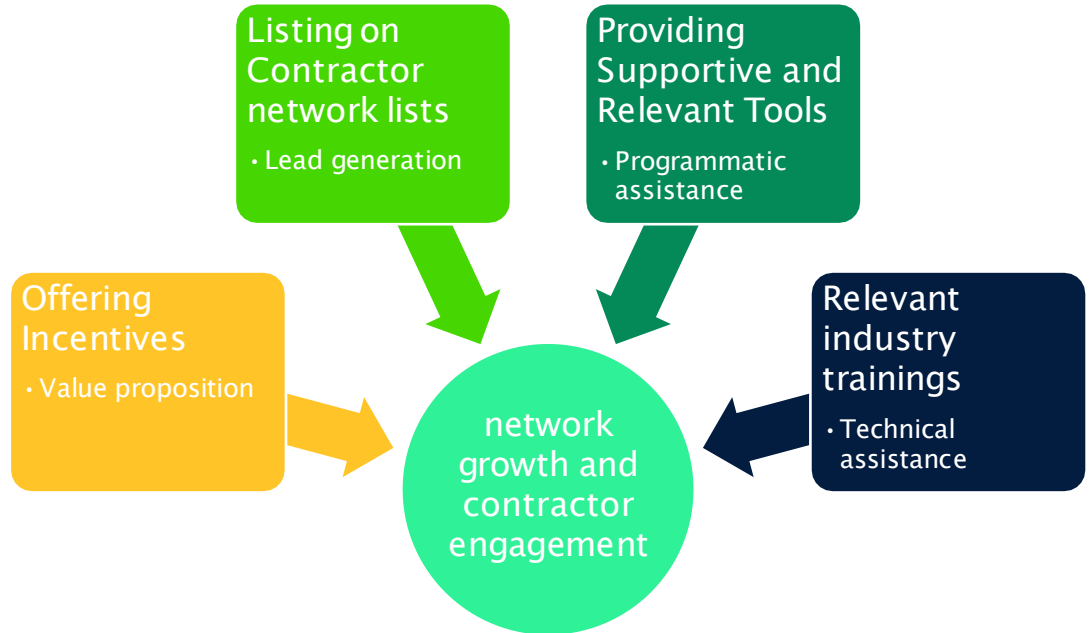
Formal Participation Agreements

- formalize the roles and responsibilities of each party involved

Revoking Participation for Non-Compliance

- mechanism to revoke participation for contractors who do not meet the minimum standards

Making Participation Valuable



Building Relationships with Trade Organizations

Importance of
Collaborating
industry
stakeholders

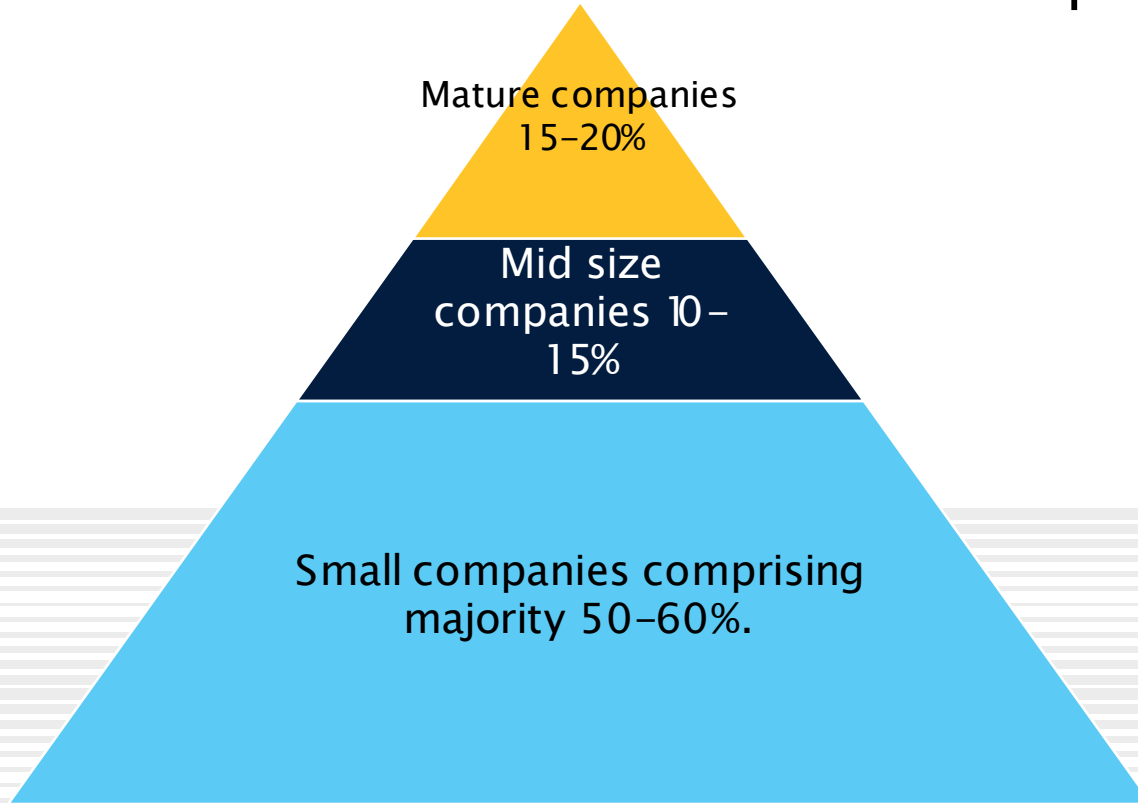
- Supply houses
- Manufacturers
- Trade organizations

Benefits for
Contractors and
Programs

- These organizations provide industry insights, training, and advocacy, benefiting both contractors and energy efficiency programs."



Understanding Contractor Sizes and Capabilities





Understanding Contractor Sizes and Capabilities

Variety of Contractor Sizes and Capabilities

- Smaller Companies may struggle with administrative burden of program participation

Catalyzing Growth of Mid and Small-Sized Companies

- Program design should be streamlined to make it accessible to as many contractors as possible

Dedicated team support network participants equitably



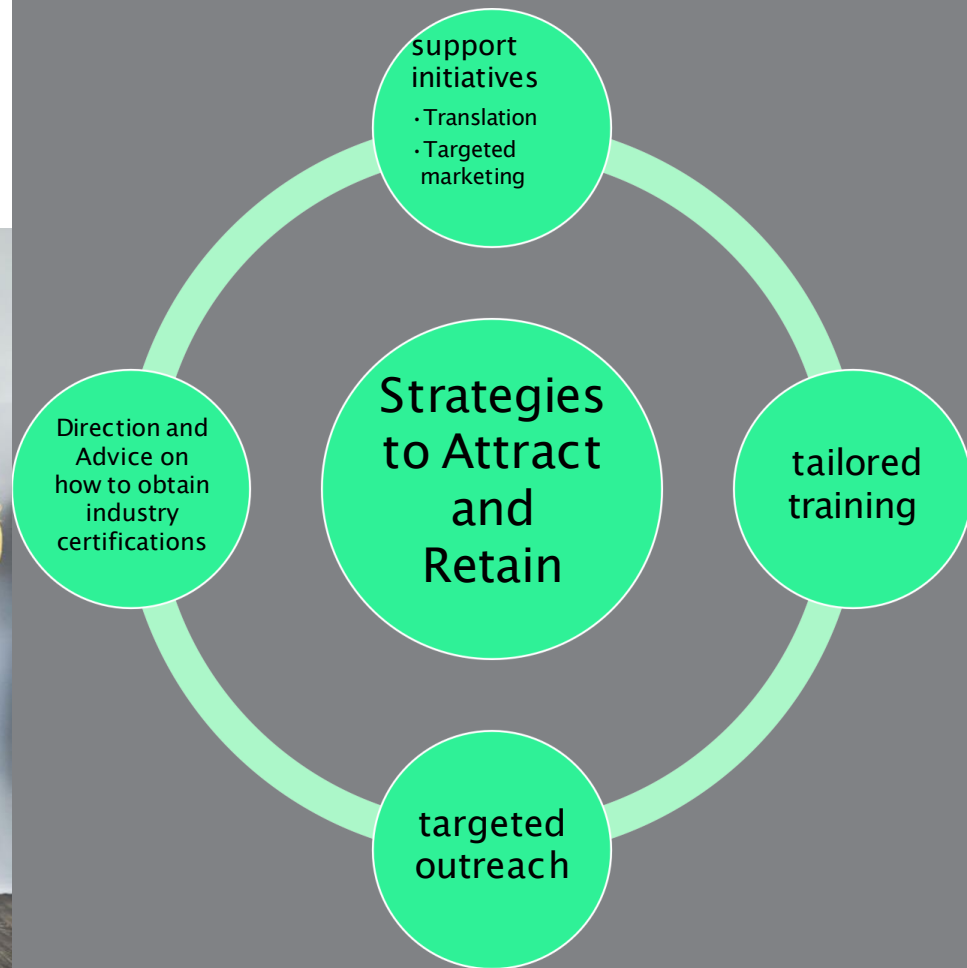


Inclusion of Small and Minority Contractors

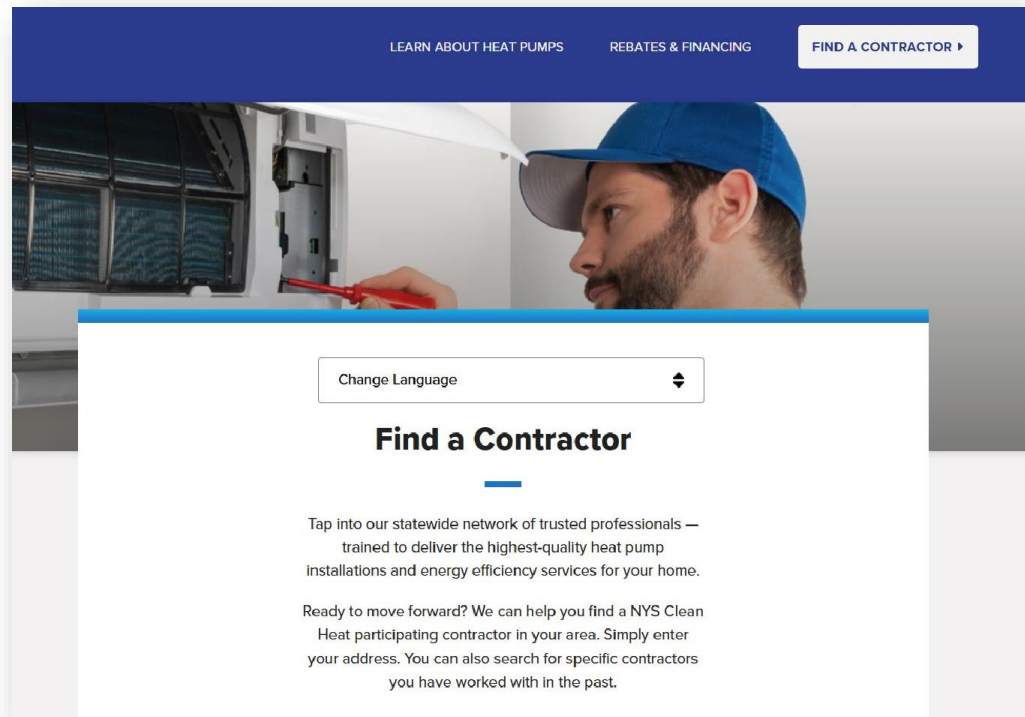




Inclusion of Small and Minority Contractors

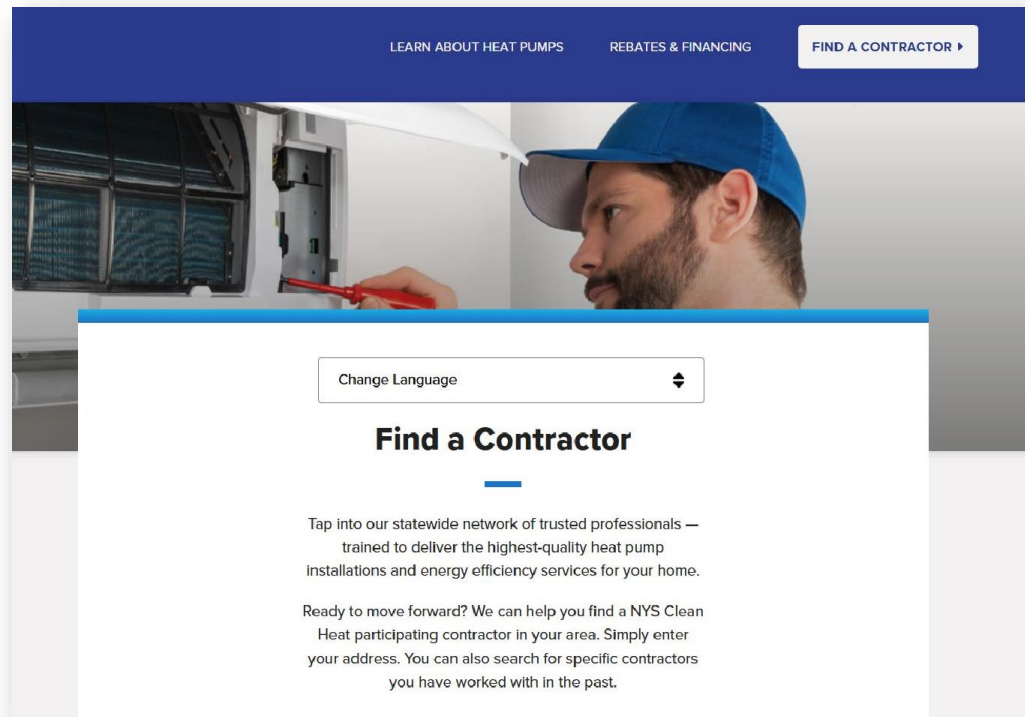


Contractor lists



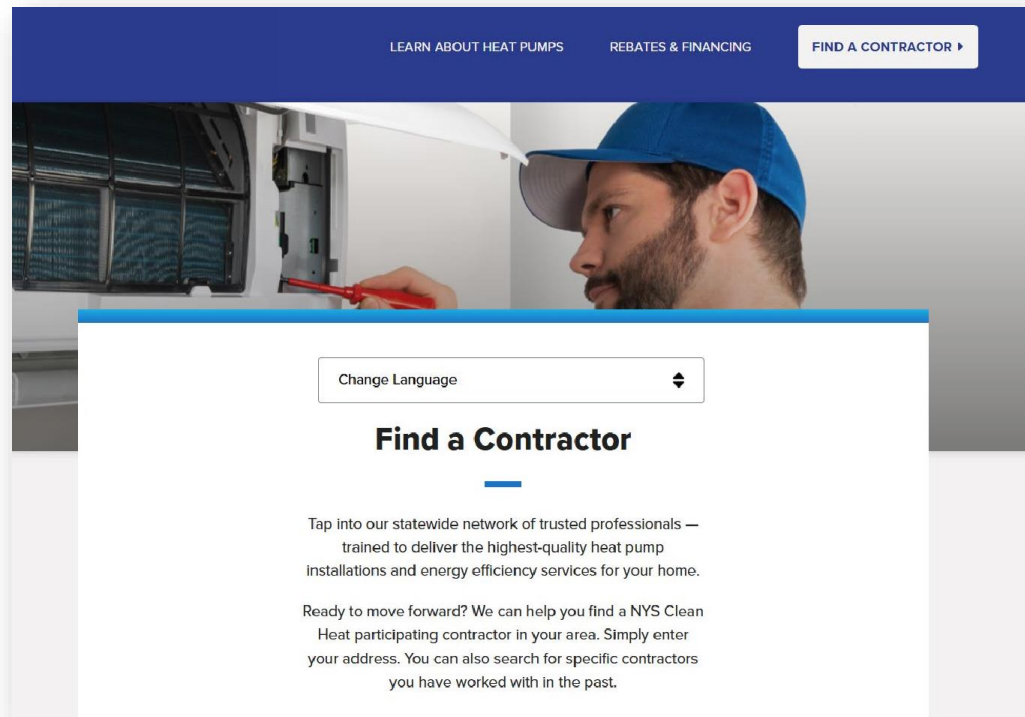
- **Providing Consumers with Easy Access to Qualified Contractors:**
- Our contractor lists are made **accessible** to consumers through user-friendly online platforms.
- These platforms feature clear and accessible **contractor profiles with search and filter options**, making it easy for market to find and hire qualified contractors for their energy efficiency projects.

Contractor lists



- **Providing Consumers with Easy Access to Qualified Contractors:**
- Offering guidelines on evaluating and selecting Network partners ,empowers customers while maintaining program neutrality

Contractor lists



- **Providing Consumers with Easy Access to Qualified Contractors:**
- Providing comprehensive lists of qualified Program Partners with transparent customer ratings and credentials can help customers make informed decisions **without implying program endorsement.**

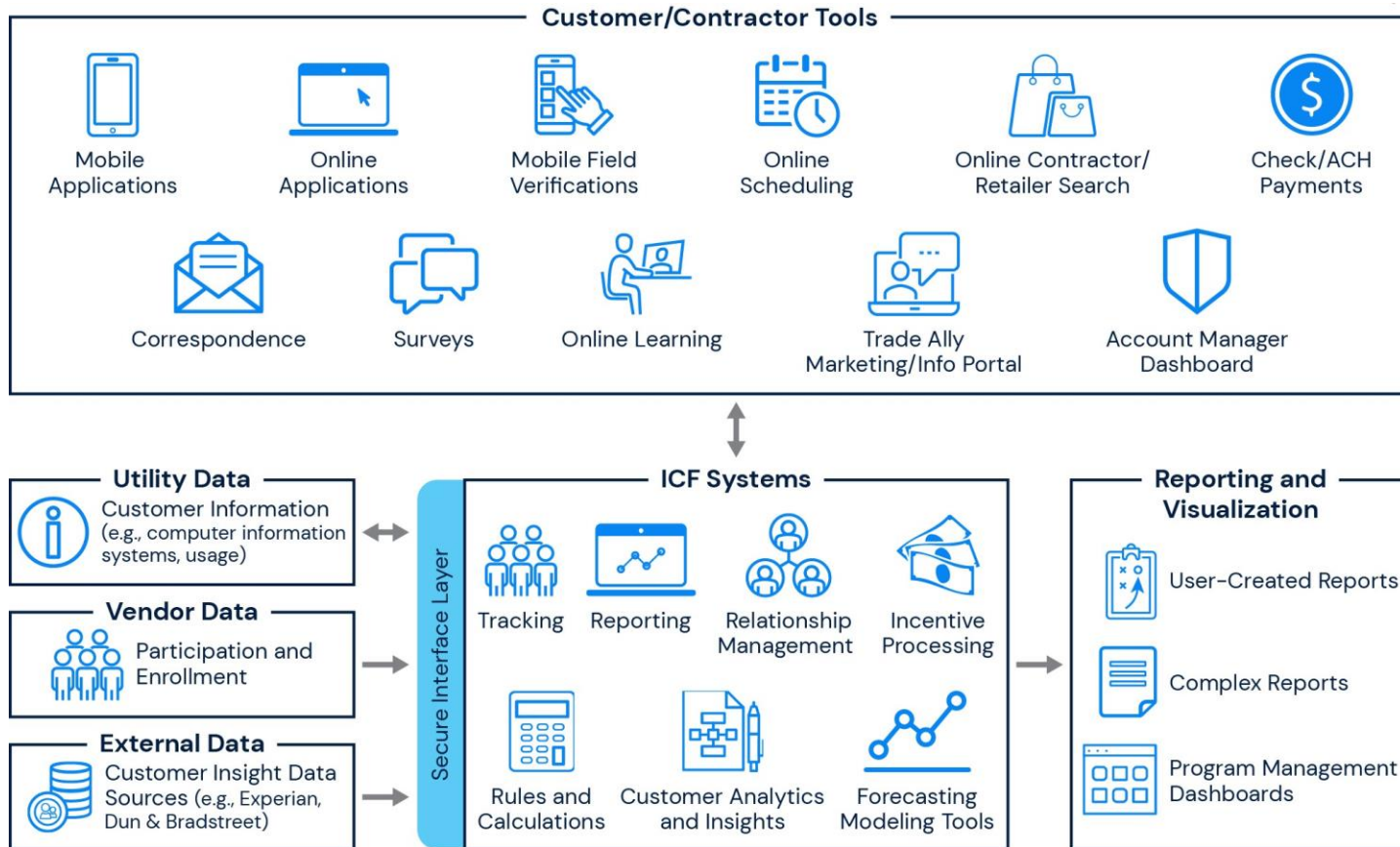
Quality Assurance and Quality Control (QA/QC)

Many programs Icf implements include QA/QC components



- Ensuring High Standards within Contractor Networks
 - Performance of contractors reflect directly on the program
 - Even with disclaimers in place **unsatisfied customers will attribute poor performance to the program**
- QA/QC Processes and Their Importance
 - **Quality assurance is necessary to maintain integrity of the program**

Technical Support and Resources





Building Strong Relationships

Importance of Collaboration and
Communication

Strategies for Maintaining Contractor
Engagement and Motivation

Provide impact results back to
industry

how much CO2 reduced

how many homes electrified

Key Points



Importance of
contractor
networks in
energy efficiency
programs

building and supporting contractor networks

Organizing and
maintaining
contractor lists
and networks

Establishing participation agreements and
minimum standards

Providing ongoing
training and
technical support

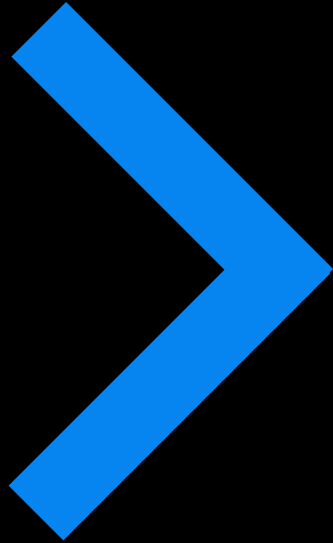
Collaborating with trade organizations

Inclusion of small
and minority
contractors

Strategies for reaching and recruiting minority
contractors

Supporting
contractors with
IT tools and
processes

Program design should be streamlined to make it
accessible to as many contractors as possible



Q&A

DOE Residential “Energy Skilled” Workforce Initiative

DOE and PNNL are providing clarity and transparency around workforce skills needed for residential energy upgrade jobs

1. Define skills
2. Make training content available
3. Recognize aligned programs
4. Inform residents



1. Define skills

Skills standards published for each job category

Energy Skilled Content Requirements - Heat Pump Installation

The following topics and key concept knowledge areas outline the technical content that is used to evaluate training programs that submit for Energy Skilled recognition. These technical areas go beyond typical requirements for heat pump installers, aligning with DOE's Building Science Education materials. To be eligible for recognition, a program must cover all required knowledge areas and additional knowledge areas representing at least 70 points.

Topic	Key Concept Knowledge Area (Bold items are required)	Possible Points
Space Conditioning Heat Pump Types and Applications	Knowledge of ducted/ductless/package terminal air source heat pumps (ASHPs)	Required
	Knowledge of ground source and water source heat pumps	2

Energy Skilled Content Requirements - Heat Pump Installation

Topic	Key Concept Knowledge Area (Bold items are required)	Possible Points
Space Conditioning Heat Pump Types and Applications	Knowledge of ducted/ductless/package terminal air source heat pumps (ASHPs)	Required
	Knowledge of ground source and water source heat pumps	2
Compressor Stages and Sequences of Operation	Knowledge of variable speed compressors	5
	Knowledge of minimum and maximum system capacity in variable speed systems	5
	Understand the difference between constant speed supply fans and variable speed supply fans	5
	Knowledge of systems with variable speed supply fans	5

Preventive Maintenance	Install and use add-on fault detection / monitoring equipment	5
	Clean and maintain equipment on a regular schedule	5

<https://bsesc.energy.gov/recognition>

Residential jobs with current skills gaps:

- Heat Pump Installation
- HP Water Heater Installation
- Home Energy Assessment
 - Single Family
 - Multifamily

<https://bsesc.energy.gov/>



3. Recognize Credential Programs



Energy Skilled recognition includes credentials across job categories:

Heat Pump



Heat Pump Water Heater



Home Energy Assessment



Explore the Residential Program Guide

Resources to help improve your program and reach energy efficiency targets:

- [Handbooks](#) - explain *why* and *how* to implement specific stages of a program.
- [Quick Answers](#) - provide answers and resources for common questions.
- [Proven Practices](#) posts - include lessons learned, examples, and helpful tips from successful programs.
- [Technology Solutions](#) **NEW!** - present resources on advanced technologies, **HVAC & Heat Pump Water Heaters**, including installation guidance, marketing strategies, & potential savings.
- [Health + Home Performance Infographic](#) – spark homeowner conversations.



<https://rpssc.energy.gov>

Health + Home Performance Infographic



DOE's Health + Home Performance Infographic reveals the link between efficiency and health – something everyone cares about. Efficiency programs and contractors can use the question-and-answer format to discover a homeowner's needs.

The infographic is ideal for the “kitchen table” conversations where people decide what to do – and who they want to do it. It also has links for homeowners to find a qualified contractor if they do not already have one.

[Download](#) this infographic from DOE's Better Buildings Residential Network.

Looking for photos to help tell your energy efficiency story? Visit our image libraries:
<https://www.energy.gov/eere/better-buildings-residential-network/articles/image-libraries>

Thank You!

Follow us to plug into the latest Better Buildings news and updates!



[Better Buildings Twitter](#)



[Better Buildings LinkedIn](#)



[Office of Energy Efficiency and Renewable Energy
Facebook](#)

Please send any follow-up questions
or future call topic ideas to:
bbresidentialnetwork@ee.doe.gov