



Better Buildings Residential Network Peer Exchange Call Series

*Talkin' About Residential Efficiency Incentives – How are
Programs and Contractors Communicating?*

July 25, 2024

Agenda and Ground Rules

- Moderator
 - **Jonathan Cohen**, Better Buildings Residential Network, U.S. DOE Residential Buildings Integration Program (RBI)
- Agenda Review and Ground Rules
- Residential Network Overview and Upcoming Call Schedule
- Opening Poll
- Featured Speakers
 - **Maddie Koewler**, National Association of State Energy Officials (NASEO)
 - **Kara Saul Rinaldi**, AnnDyl Policy Group and the Building Performance Association (BPA)
 - **Rose Stephens-Booker**, Building Decarbonization Coalition
- 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):

- *8/8: Contractor Lists & Network – What Are Good Practices?*
- *9/12: New Contractor Resources – Decision Tools for Retrofits, Heat Pump Water Heaters, and Cold Climate Heat Pumps*

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



Maddie Koewler
NASEO



National Association of
State Energy Officials

Talkin' About Residential Efficiency Incentives – How Are Programs and Contractors Communicating?

Maddie Koewler | July 25, 2024

Photo Courtesy of RL Martin



About NASEO

- The only national non-profit association for the governor-designated energy officials from each of the 56 states and territories
- Serves as a resource for and about the State Energy Offices through topical committees, regional dialogues, and informational events that facilitate peer learning, best practice sharing, and consensus building
- Advances the interests of the State and Territory Energy Offices before Congress and the Administration
- Learn more at www.naseo.org

NASEO Board of Directors

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NASEO Programs and Priorities



Buildings



Electricity



Climate



Financing



Workforce



Resilience



Equity



Planning



Innovation



Transportation



Solar



Policy



Security

State Energy Office and Residential Energy Contractor Opportunities

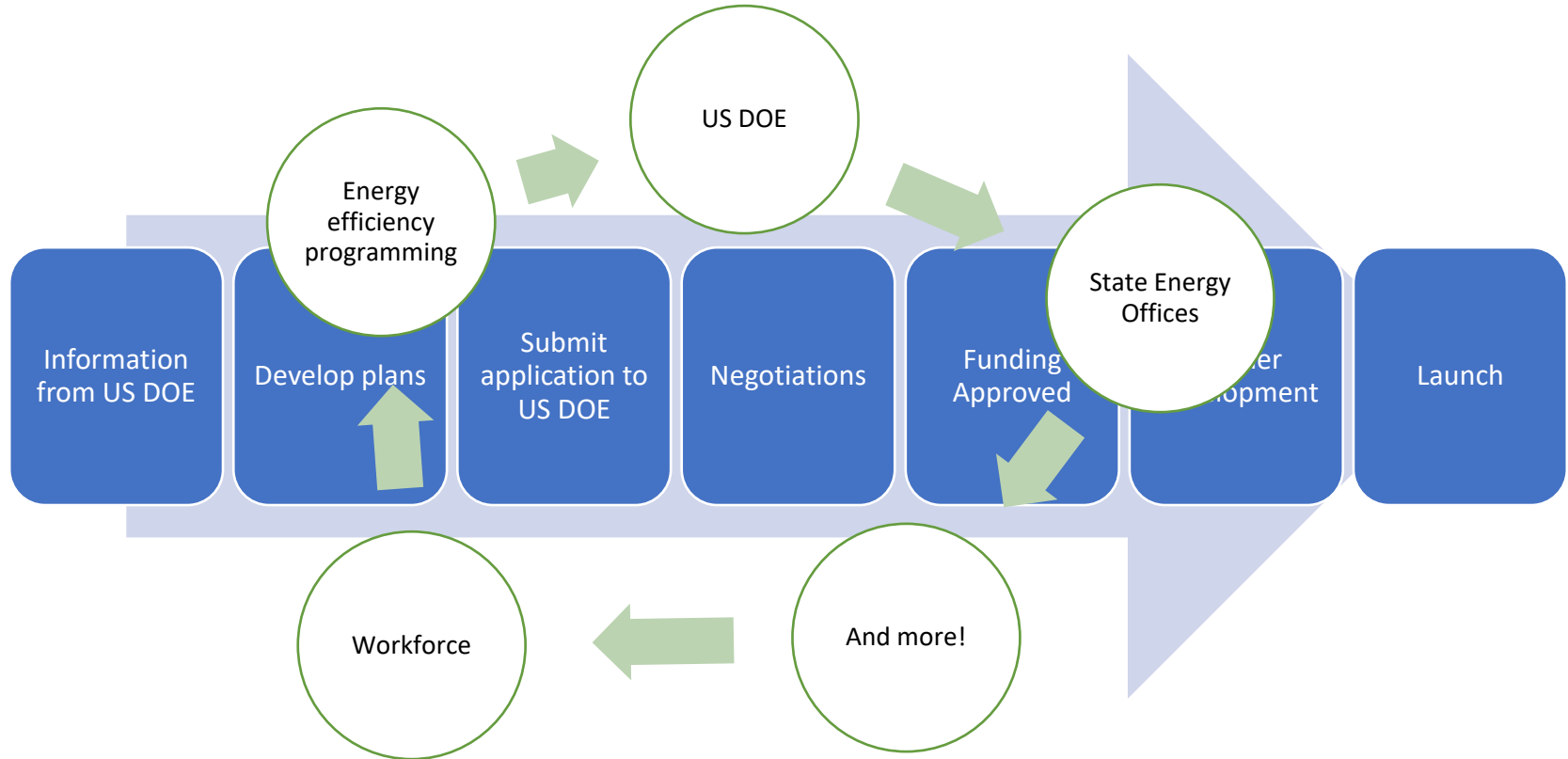
Infrastructure Investment and Jobs Act

- Section 40502
- Section 40503

Inflation Reduction Act

- Section 50121
- Section 50122
- Section 50123

State Activities and Timelines



Join in!

State and Territory Energy Office Planning and Engagement

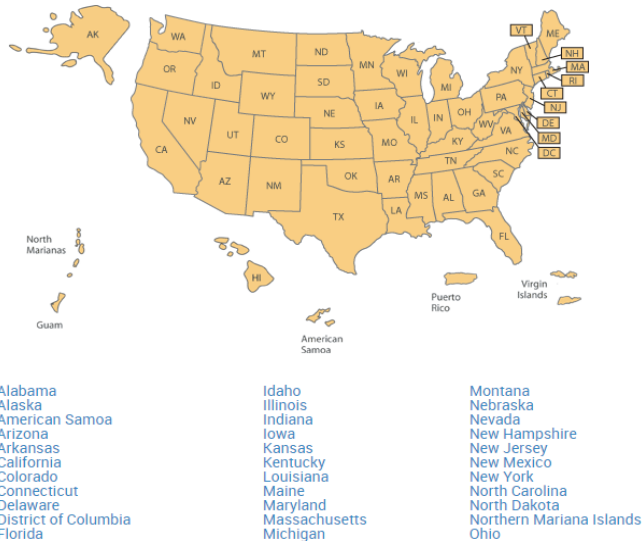
State and Territory Energy Office Planning and Engagement

- [Alabama Home Energy Rebates Website](#)
- [Alaska Home Energy Rebates Website](#)
- [Arizona Home Energy Rebates Website](#)
- [California Home Energy Rebates Website](#)
- [Colorado Home Energy Rebates Website](#)
- [Connecticut Home Energy Rebates Website](#)
- [Delaware Inflation Reduction Act Website](#)
- [District of Columbia Home Energy Rebates Website](#)
- [Florida Home Energy Rebates Website](#)
- [Georgia Home Energy Rebates Website](#)
- [Hawaii Home Energy Rebate Feedback Form](#)
- [Idaho Rebates and Incentives Website](#)
- [Illinois Home Energy Rebate Website](#)
- [Indiana Home Energy Rebates and Public Engagement Opportunities](#)
- [Indiana Home Energy Rebates Program Feedback Form](#)
- [Iowa Home Energy Rebate Website](#)
- [Kansas Home Energy Rebate Fact Sheet](#)
- [Maine Home Energy Rebates Website](#)
- [Maryland Home Energy Rebates Progress Report](#)
- [Maryland Home Energy Rebates Website](#)
- [Michigan Home Energy Rebates Website](#)
- [Minnesota Home Energy Rebates Website](#)
- [Missouri Home Energy Rebates and Public Engagement Opportunities](#)
- [Missouri Home Energy Rebates Program Feedback Form](#)

[Montana Home Energy Rebates Website](#)

naseo.org/issues/buildings/ira-task-force

Click on the map below for information about each state energy office:



naseo.org/members-states

Thank you!

Maddie Koewler

mkoewler@naseo.org



Kara Saul Rinaldi
AnnDyl Policy Group
Building Performance Association (BPA)

Making Incentives Work for States, Contractors, and Communities

*Strategies for Maximum Program
Achievement*

Kara Saul Rinaldi

July 25, 2024





Agenda

-  About us and our work
-  Ten Recommendations for States
-  Key Takeaways
-  Questions & Discussion



The Building Performance Association is a membership-driven 501(c)6 industry association dedicated to advancing the home and building performance industry. Built upon three decades of experience, the Association is well-positioned to provide industry support through key areas including advocacy, education, programs, networking, publications, and community.

BPA reaches more than 20,000 individuals and organizations working in contracting services, weatherization, product manufacturing and distribution, program administration, building science, and nonprofits through our various programs and events.

www.building-performance.org



AnnDyl Policy Group is a Washington, DC-based policy strategy firm that focuses on energy efficiency, renewable energy, and climate change policy, programs, financing, and technology.

We represent clients from across the energy efficiency and clean energy industries, including technology and financial sector companies, energy trade associations, and non-profit organizations.

www.anndyl.com

AnnDyl Policy Group Team:

Kara Saul Rinaldi, AnnDyl President and CEO &
Chief Policy Officer for BPA

Alice Bell, Senior Policy Associate, AnnDyl

Engagement Methods

Maryland, May 9, 2024

- Virtual and in-person conversation with **hundreds of contractors nationwide.**
- Included discussion of:
 - Tax credits
 - Weatherization Assistance Program
 - Pre-weatherization programs
 - Federal workforce development funding
 - Home Energy Rebate Programs
 - State incentives (where applicable)
- Seeking alignment between community and contractor needs, state design choice points, and the realities of home upgrades.
- Helping contractors understand how to braid different state and federal requirements.



Minneapolis, April 8, 2024 – National Home Performance Conference

Disclaimer

- These recommendations emerged from observations made by the AnnDyl/BPA research team in 2023/2024.
- These are not recommendations by DOE, the Energy Foundation, or any of our other funders who support different elements of our engagement with contractor communities.
- A key part of our engagement is to help contractors braid and leverage incentives -- but incentives are still emerging.
- We provide recommendations to contractors on utilizing emerging incentives (building-performance.org) and will be providing additional concrete steps in the coming months.

1a. Empower contractors by providing free, clear, simple consumer-facing handouts to distribute to customers.

- Addresses homeowner and contractor confusion about individual and measure eligibility.
- **Empowers both parties to plan ahead and understand their options.**
- Protects contractors from accusations of upselling.
- Quality translations and multilingual support ensure **access for all communities.**



1b.

Provide established, trusted community organizations with messaging support, eligibility guidance, and other consumer FAQs.



- Establishes **reciprocal, ongoing relationships** with local organizations, including trade associations and CBOs.
- Effectively reaches low-income communities as well as contractors – contractors live in communities too!

2.

Offer accessible, in-person training for contractors on programs, including consumer and measure eligibility.

- Train contractors on state program eligibility and unique **stacking** requirements.
- Include small firms by providing low-cost or size-based, local, and in-person training.
- **Empowered contractors can support homeowners in making informed, efficient, cost-effective choices.**



3.

Prioritize rebates for low-income households but preserve some funding for market-rate households to ensure market transformation.

- States may want to **set aside robust funding to support low-income families.**
- Middle income families have more financial freedom to spur demand.
- **Best of both worlds approach:** States support families who need it the most while ensuring that markets keep moving forward.



4.

Prioritize covering 100% of the costs for low-income recipients over contractor incentives.



- Contractors place more priority on higher incentives for homeowners than increased payments for themselves.
- Understanding the costs of home upgrades in each state allows the state to tailor the amount of support available.
- Consider supporting **maintenance costs** for those accepting heat pump rebates.

5.

Provide uniform, easy pre-project verification of measure and household eligibility and income.

- **Categorical eligibility is a powerful way to support low-income families and streamline approvals.**
- Contractors can provide support in the verification but should not be handling sensitive financial information.
- Can also speed **response to common emergency replacement needs.**



6.

Provide federal incentive funds to contractors within two weeks to reimburse eligible upgrades.



- Small businesses are not able to carry balances for longer than 1-2 weeks due to distributor payments, payroll, and other ongoing major expenses.
- Streamlined communication about rebate (utility or federal) status can help resolve any issues with projects quickly.

7a.

Balance requirements for inclusion in the Qualified Contractor List (QCL).

- The QCL is a powerful way to ensure high-quality installs.
- Jobs can be sped up and still done well by preserving a robust pool of contractors where possible.
- Fuel-switching jobs still need the health and safety of the home addressed.
- **Tailor requirements to the specific measure** (e.g., an induction stove may only require electrician's licensure).



7b.

Ensure there are processes to verify contractors' licenses and certifications.

- Consider offering information about best practices for installations and inform the public about what to look for in a contractor.
- **Enforcement supports fairness in the marketplace** by rewarding skilled, certified, licensed contractors.



8.

Balance and streamline QA inspections where possible. Reward contractors that have proven their skills by reducing required inspections.

- Leverage the QA survey to follow up with homeowners and identify well- or poorly-done jobs with less administrative investment.
- Projects done under different incentive programs need to work together.
- Keep programs minimally invasive and easy for homeowners to engage with.



9

Continue engaging contractors in your state on the best way to align envelope upgrades with rebate and tax credit incentives.

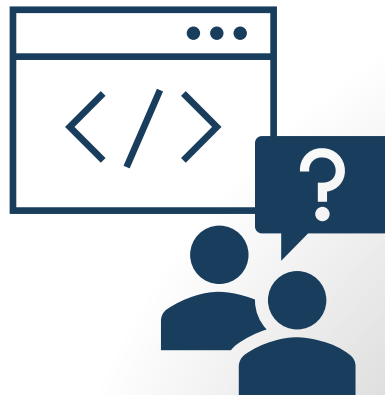


- Envelope improvements before heat pump installation is ideal for both cost savings and comfort.
 - Many families only address heating and cooling in emergencies, complicating any pre-install upgrades.
- The high diversity of weather, building stock, and fuel prices across the country means the same measure will need to look different in different places.

10.

Provide a one-stop shop to both contractors and the public.

- **A robust one-stop shop will help everyone involved.**
- Provides consistency, simplicity, and communication.
- Provides a single source of information and reduces stress and confusion for homeowners *and* contractors.
- Include eligibility and compliance information, payment status updates, and multilingual resources.



How contractors can engage

- **Direct customers towards tax credits and existing state funding** – rebates aren't available yet!
- **Emphasize the house-as-a-system** and how insulation, air sealing, and similar can improve the efficacy of a new heat pump.
- **Consider partnering** with other firms to provide a broader slate of services.
- **Consider providing maintenance guidance** to new heat pump owners.
- **Training is key.** Plan to support training for your teams during the shoulder season of likely training (look for funding support).
- **Know where to find updated guidance** on any state, federal efficiency and weatherization incentives so you can support customers.
- **Stay tuned for outreach from your state's energy office!**

Key Takeaways

- **Communication**

- Intuitive, robust one-stop shop
- State-provided, state-approved communications materials
- Reciprocal relationships with trusted community organizations

- **Meaningful access and empowerment**

- Training on program design and incentive stacking/braiding
- Quick payments to contractors
- Practical, achievable standards for Qualified Contractor Lists
- Pre-project, third-party and/or state income verification

- **Ongoing engagement and conversation**

Additional Resources

- **Resources from DOE EERE's Residential Program Guide:**
 - [Program Design & Customer Experience | Residential Program Guide \(energy.gov\)](#)
 - [Proven Practices: Help Contractors Sell Home Upgrades | Residential Program Guide \(energy.gov\)](#)
 - [Proven Practices: Lower Contractors' Barriers to Entry | Residential Program Guide \(energy.gov\)](#)
 - [Proven Practices: Develop Partnerships | Residential Program Guide \(energy.gov\)](#)
- [Community-Based Social Marketing Toolkit | Better Buildings Residential Network \(energy.gov\)](#)
- **Building Performance Association:** <https://building-performance.org/>

Thank you!

Kara Saul Rinaldi

President & CEO, AnnDyl Policy Group

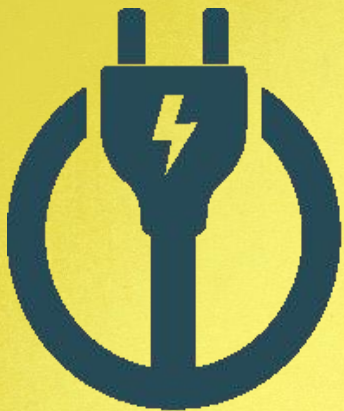
Chief Policy Officer, Building Performance Association

kara@anndyl.com

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Rose Stephens-Booker
Building Decarbonization Coalition



THE SWITCH IS ON

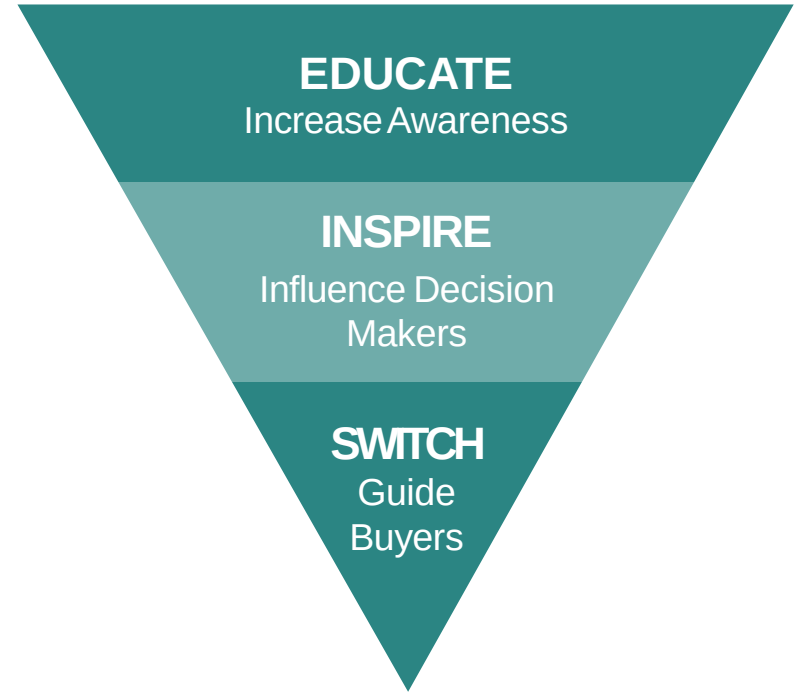
POWERED BY THE BUILDING DECARBONIZATION COALITION,
PRESENTED BY ROSE STEPHENS-BOOKER, DIRECTOR OF STATE
MOBILIZATION

A One-Stop Shop Marketing,
Education & Outreach Campaign

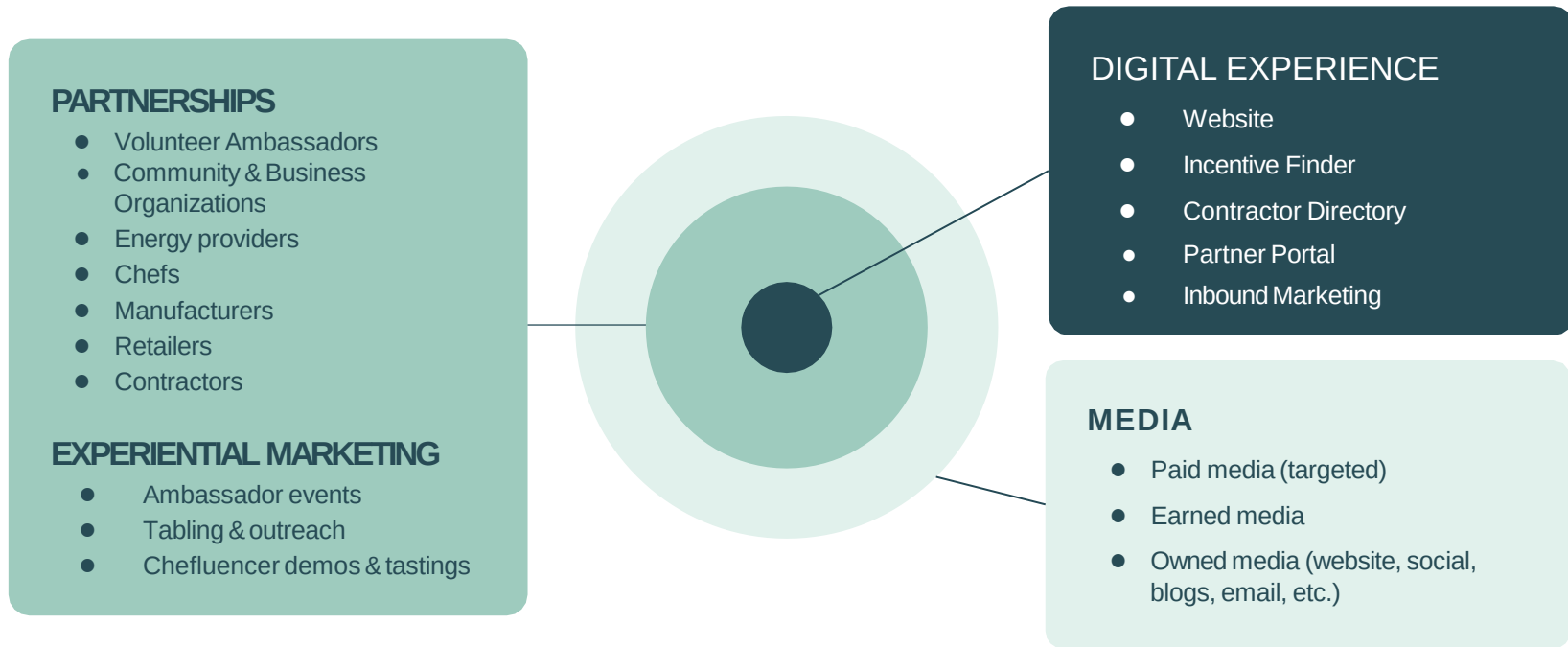


Have a Strategy for Each Stage of the Funnel

- Reach beyond early adopters
- Prime both sides of the transaction
- Empower local campaigns & trusted messengers
- Increase awareness & favorability
- Help when people are ready to switch



Blanket Communities with Pro-Electrification Marketing, Normalize Switching & Help People When They Are Ready to Act





EDUCATE

INSPIRE
SWITCH

Targeted Paid Media Can Help Blanket Your Community with a Simple Message: Electric is Cleaner, Safer & Smarter

PAID MEDIA PERFORMANCE

Up to 26% lift across awareness, favorability, and perceptions

Up to 39% lift across awareness, favorability, and perceptions when partnering with utilities on customer emails & layering with metering data

Creatives, messaging, and videos made positive impact



EDUCATE
INSPIRE
SWITCH



We Empower Trusted Messengers to Tell Their Stories & Normalize Switching.



Campaign Ambassador telling her electrification story on Telemundo, September 2022



Campaign Ambassador doing home tour with Congresswoman Porter and Secretary Granholm, October 2022



Switch Is On spokesperson on heat pump water heaters on Telemundo, January 2024



Live induction cooking demonstration with Martin Yan with realtors



Contractor convening hosted by Ferguson and sponsored by BDC, NYSEDA, AO Smith, and Fujitsu, March 2023



Chefluencer training for chefs on induction, heat pumps, and home electrification

Ambassadors Get Out in the Community to Promote Electrification, Your Programs & Workforce Opportunities



The Switch Is On Ambassadors tabling at LA Neighborhood Council event



Celebrity Chef Tu David Phu: live induction demo
180 primarily Vietnamese speaking local residents,
in partnership with BayRen

Ambassadors Create Inspiring Content...



Life changing story on induction switching
Ying Shipman, SIO Ambassador



Why contractors are transitioning their
businesses to promote heat pumps

And Some Ambassadors Have Special Talents!



[A heat pump croons about 'climatic healing' in Berkeley musicians' new song, Feb 2024](#)
[Don't think heat pumps are sexy? This slow jam could change your mind, Jul 2024](#)
[\(I'm Your\) Heat Pump – Official Music Video](#)

Earth Day, Apr 22, 2024

Mike Roberts, SIO Ambassador



THE SWITCH IS ON

EDUCATE
INSPIRE
SWITCH

We Provide Easy to Access Information to Help People When They Are Ready to Act

DIGITAL METRICS

Website

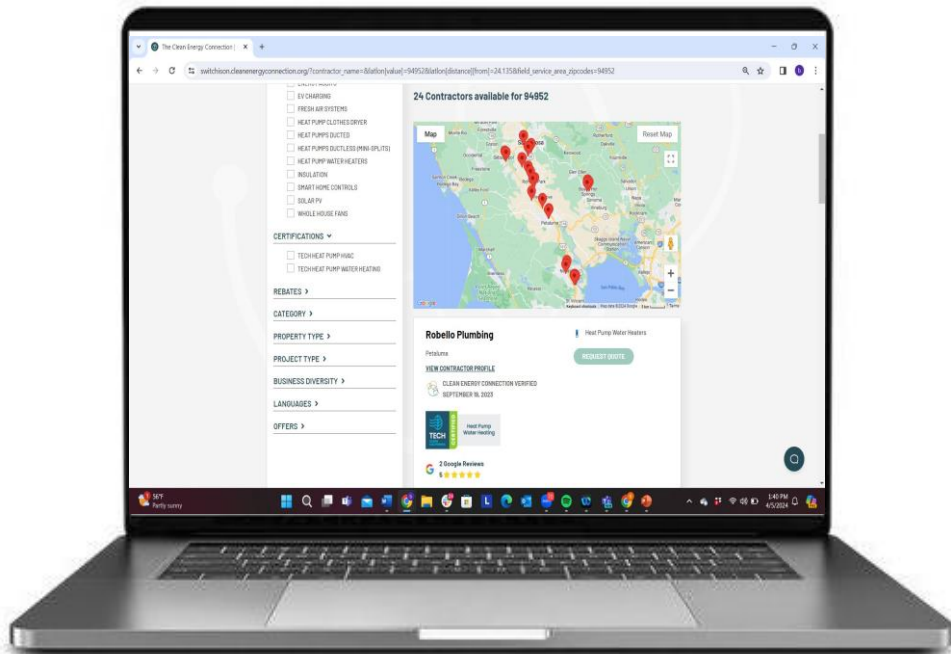
- 1,000+ daily unique visitors
- 20% returning visitors

Incentive Finder

- 70 programs
- 300 incentives
- 500K searches in 2023

Contractor Directory

- 1,200 contractors
- 7,000 leads in 2023



Everyone Wants Reliable Incentive Data

Incentive Finder: A complete list of local, state, and federal incentives

300
incentives

70
programs

500K
searches/yr

2024 ROADMAP

Additional product categories: solar, batteries, EVs, etc.

Improved incentive stacking & eligibility

Integration into website user journey

Nationwide coverage with open data

- Every incentive program in the U.S.
- Comprehensive, structured, reliable database
- **NODE Collective:** nodecollective.org

The screenshot displays the 'INCENTIVE LOOKUP FOR CUSTOMERS' interface. On the left, a sidebar contains filters for INCENTIVE TYPE (REBATE, TAX CREDIT), BUILDING TYPE (SINGLE-FAMILY, MULTI-FAMILY), EQUIPMENT TYPE (Choose), INCOME QUALIFYING? (NO), and WHO CAN APPLY? (HOMEOWNERS, RENTERS). The main content area shows a search bar with 'Zipcode' and 'Space Heating/Cooling' dropdowns, a 'SEARCH' button, and a 'CLEAR ALL' button. Below this is a three-step process: SEARCH (for local California incentives), CONNECT (with trusted contractors), and ENJOY (the benefits of your new electric appliance). The results section highlights the 'Federal Tax Credit' with a 'Save Up To \$2000 - Federal Tax Credit On Central Heat Pumps, Mini-Split Heat Pumps Projects' offer. It includes a 'LEARN MORE' button and detailed requirements for the 25C tax credit. At the bottom, there is a 'SIGN-UP' button to receive updates.

Uplift Efficient Appliances, Empower Contractors

Product Finder: A catalog of electric appliances

Qualifying Product List

Contractors can search for appliances eligible for
TECH Clean California incentives

Technical Specifications

Performance attributes and other specs from certified
AHRI database and NEEP cold climate heat pump list

Cold Climate Heat Pump Check

Guidance for consumers to ensure they get a heat pump
appropriate for their climate

FIND ELECTRIC APPLIANCES



Heat Pumps



Water Heaters



Cooking



Dryers

OTHER ELECTRIC APPLIANCES



Fireplaces



Grills



Outdoor Heaters



Pool Heaters



Saunas

Customers are Looking for Contractors to do Electric Projects

Contractor Finder: A directory of quality electrification contractors

Customers:

- Zip code and project search
- User-friendly interface
- Curated contractor recommendations
- Integrated with The Switch Is On Incentive Finder

7,000
leads/year

Contractors:

- Streamlined onboarding
- Easy password-free sign in
- Customizable profile
- Verified business license

1,200
contractors

BRENNAN
HEATING & AIR CONDITIONING

Brennan Heating & AC LLC

★★★★★ 4.6 (19K Google Reviews)

License verified

Verified license
The Switch Is On has verified this business license.
View license information

About Brennan Heating & AC LLC
Our goal is to help you make your home more energy efficient while saving you money. We offer a wide variety of home improvement products including furnaces, air conditioners, heat pumps, hydronic heating systems, indoor air quality products, gas water heaters, tankless water heaters, and more.

Business information
Location
4601 S 134TH PL, Seattle, WA, 98168
Website
brennanheating.com
View contact information
Languages spoken
English

Service area


Services provided
Heat pumps & HVAC
Heat pumps (ducted central air)
Heat pumps (ductless mini-splits)
Smart thermostats
Indoor air quality assessments
Water heater
Heat pump hybrid water heaters



The clean energy pro network
Join us today!
Sign up for free
Have an account?
Sign in

Future-proof your business by joining **The Switch Is On** pro network, your springboard to getting more electrification jobs.

Get quality leads
We'll connect you directly with homeowners who are charged up and ready to talk about electrification projects with an expert like you.


Highlight your offers
Showcase the incentive programs you're affiliated with right on your profile. When customers are looking to save with incentives and rebates, they'll know you're the pro who can make it happen.


Stand out with your expertise
Coming soon!
Display our pro-electrification badge on your profile - it's a symbol of your high-quality service and dedication to advancing clean, energy-efficient homes.




THE SWITCH IS ON

Happy Customers Tell Their Switching Stories & Inspire Others on Earned Media that Reach Millions...

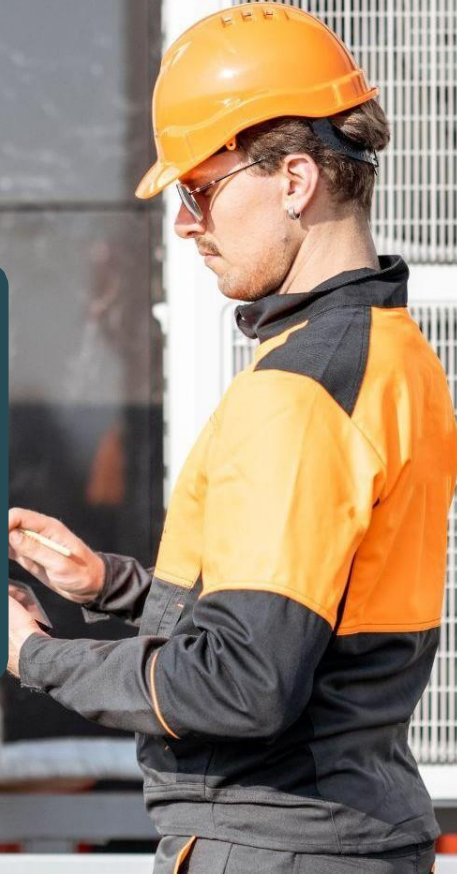


Los Angeles Daily News
(SoCal News Group - 11 local papers)
[Heat pumps: New rebates help more Southern Californians make the switch](#), Nov 2023
Steve Irwin, SIO Ambassador



Telemundo
[California busca que residentes utilicen energía renovable en pro del medio ambiente](#), Jan 2024
Andrea Diaz, SIO Ambassador
Jacqui Guzman, SIO Ambassador

KEY TAKEAWAYS



Remember These Three Things

- To raise awareness and favorability, you are running a statewide campaign and a network of local community campaigns
- To reach beyond early adopters, you need a trusted messenger program
- Prime both sides of the transaction (customers and contractors)



Thank You

Rose Stephens-Booker, Director of State
Mobilization

rstephensbooker@buildingdecarb.org

Smart Tools for Efficient HVAC Performance (STEP) Campaign



Scan this QR code to visit our website

Contact: christian.valoria@pnnl.gov

The STEP Campaign aims to increase adoption of **smart diagnostic tools** to streamline HVAC system performance testing and troubleshooting, **reducing energy-wasting faults** and **improving occupant comfort**.

To join the STEP Campaign, visit: bit.ly/3DFmEaE



HVAC Contractors and Technicians

- Reduce callbacks, improve consistency and quality, streamline processes
- Find out where to get training on smart diagnostic tools
- Be recognized for successful adoption of smart diagnostic tools!



Utilities and Program Implementers

- Streamline quality installation and quality maintenance programs
- Improve engagement with your contractors
- Be recognized for programs that utilize smart diagnostic tools!



HVAC Training Organizations

- Offer qualified training on System Performance with smart diagnostic tools
- Promote your training events
- Be recognized for providing training!



Weatherization Organizations

- Ensure your ASHP/CAC installations are operating at optimized efficiency
- Develop pilot with PNNL team
- Be recognized!

ORGANIZING PARTNERS

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!



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Facebook](#)

Please send any follow-up questions
or future call topic ideas to:

bbresidentialnetwork@ee.doe.gov