The Personal Touch to EE Program Delivery Adds Value: Proven, Scalable and Affordable

5-2-2013
Session Objectives:

1. Measureable Impacts
2. Program Structure
3. Program Deployment
4. Lessons Learned
5. Detailed cost / benefit analysis
The Small Town Energy Program

A 3-year grant from the U.S. Department of Energy to the Town of University Park, Maryland (UP), August, 2010 through July, 2013.

“To create a model residential energy transformation program that serves as a roadmap for other small towns.”
University Park, Maryland (UP)

- 2,500 residents
- 897 single-family households
- Typical small town:
  - volunteer Council
  - small staff & budget
  - no energy expertise
  - middle income
Measurable Impacts

• 32% of owner-occupied homes in town have signed up for STEP (275)

• 25% of owner-occupied homes in town have had a HPwES audit (215)

• 15% of homes in town have been retrofit to 15% savings (130)

• 60% audit-to-retrofit conversion rate

• 10% program penetration to date in 3 new communities (launched last July)
Program Structure

Leverage Existing Programs

- STEP functions like an “app”, sitting atop existing utility and State residential efficiency programs and leveraging:
  - Contractor qualifications and pools
  - Data and reporting
  - Home Performance with ENERGY STAR (HPwES)

- Rebates: 50% of the cost of each retrofit job
Program Deployment

The Energy Coach

- **Transaction Barriers**: the audit, contracting and rebate process is confusing and inconvenient.
  - application, waiver, contractor selection, review audit report, review retrofit proposals, rebates

- The Coach makes it simple, transparent and trustworthy – working independently with clients at each and every step.
Program Deployment

Small Town Delivery

• STEP *targets* communities that best fit the program demographic;

• STEP leverages existing, trusted community channels for program outreach. Less than 5% of program is marketing costs;
Program Deployment

Community channels...
• Councils, wards, HOAs
• Town list serve, events and newsletter
• “house parties”
• Civic association
• clubs, churches
• school and PTA

...and the killer green sign
Lessons Learned

• Client surveys consistently identify the Coach as the most valuable part of the program, with a 97% approval rating.

• Neighbors become the program ambassadors, leveraging a key small town dynamic;

• STEP is scalable and replicable:
  – already active in 4 communities supported by a single Energy Coach (Salesforce CRM)
  – STEP is building a “tool kit” with all program collateral customizable to make program propagation fast, easy and inexpensive
## Cost / Benefit

<table>
<thead>
<tr>
<th>Metrics</th>
<th>STEP Values (12/31/12)</th>
<th>% of our IOU’s Entire HPwES Program*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Potential Market (homes)</td>
<td>5,000</td>
<td>1%</td>
</tr>
<tr>
<td>Audits</td>
<td>318</td>
<td>9%</td>
</tr>
<tr>
<td>Retrofits</td>
<td>155</td>
<td>13%</td>
</tr>
<tr>
<td>Audit to Retrofit Conversion Rates</td>
<td>40%-64%</td>
<td>24%-30%</td>
</tr>
<tr>
<td>2012 Hard Marketing Costs</td>
<td>&lt;$10,000</td>
<td>$323,717</td>
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</tbody>
</table>

THANK YOU

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