



Better Buildings Neighborhood Program Data and Evaluation Peer Exchange Call: *Calculating and Communicating Program Results*

Call Slides and Summary

February 23, 2012

- Call Logistics and Attendance
 - How is your project calculating and communicating activities and results?
- Program Experience and Lessons:
 - Energize Phoenix:
 - Dimitrios Laloudakis, Energize Phoenix
 - Mick Dalrymple, Arizona State University
 - Alex Castelazo, Arizona State University
 - Community Power Works (Seattle):
 - Adam Buick, Community Power Works
 - Vince Schueler, Washington State University
- Discussion:
 - Why collect and communicate data on program activities and results?
 - Who are the target audiences and how do they use the data?
 - What data sources are programs using?
 - What are some of the benefits or challenges of data collection and communication?

Participating Programs and Organizations



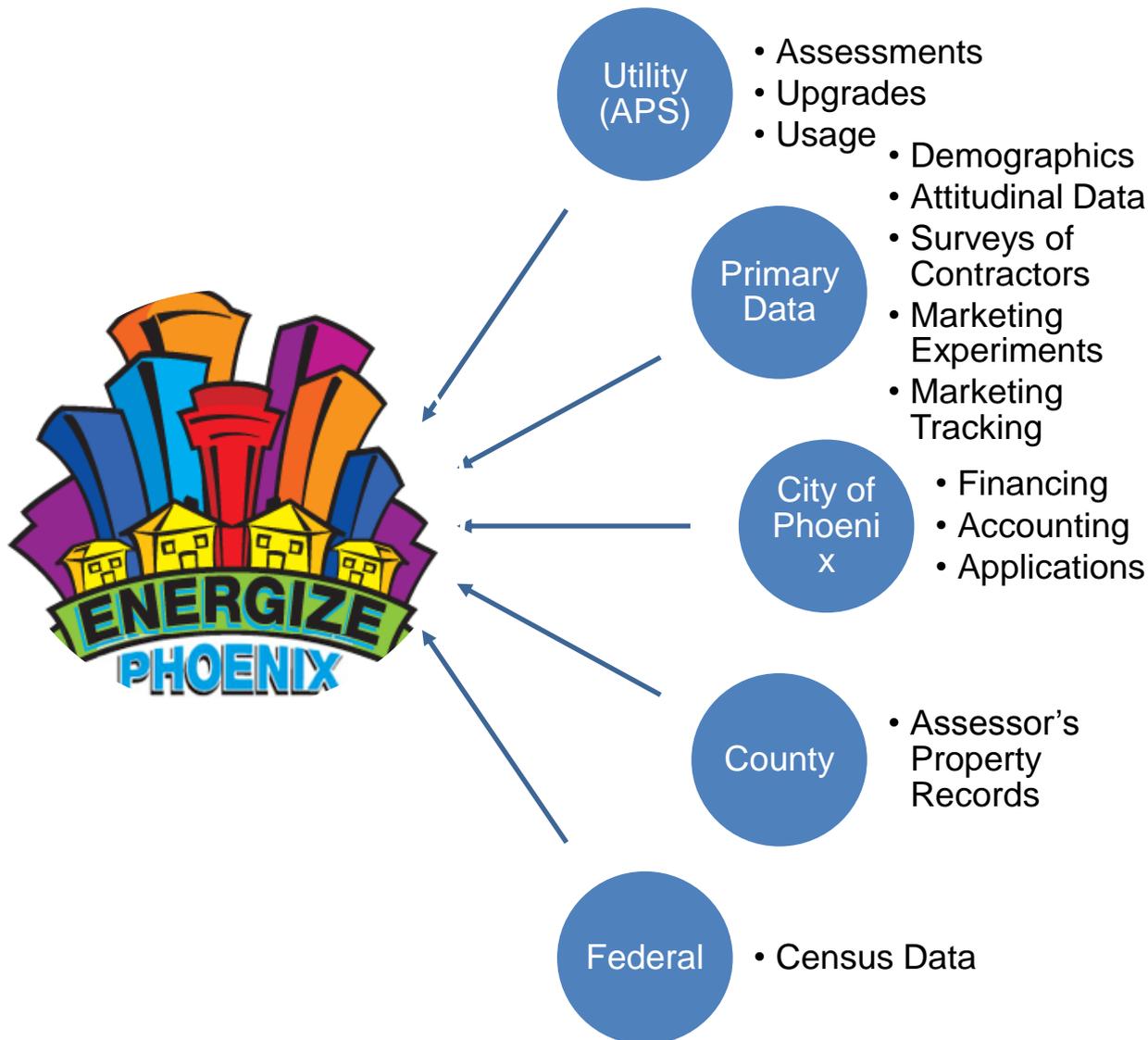
- Austin, TX
- Bainbridge Island, WA
- Boulder, CO
- Cincinnati, OH
- Long Island, NY (Long Island Green Homes)
- Maine
- National Association of State Energy Officials (NASEO)
- Phoenix, AZ
- Sacramento, CA
- Seattle, WA
- University of North Carolina Environmental Finance Center



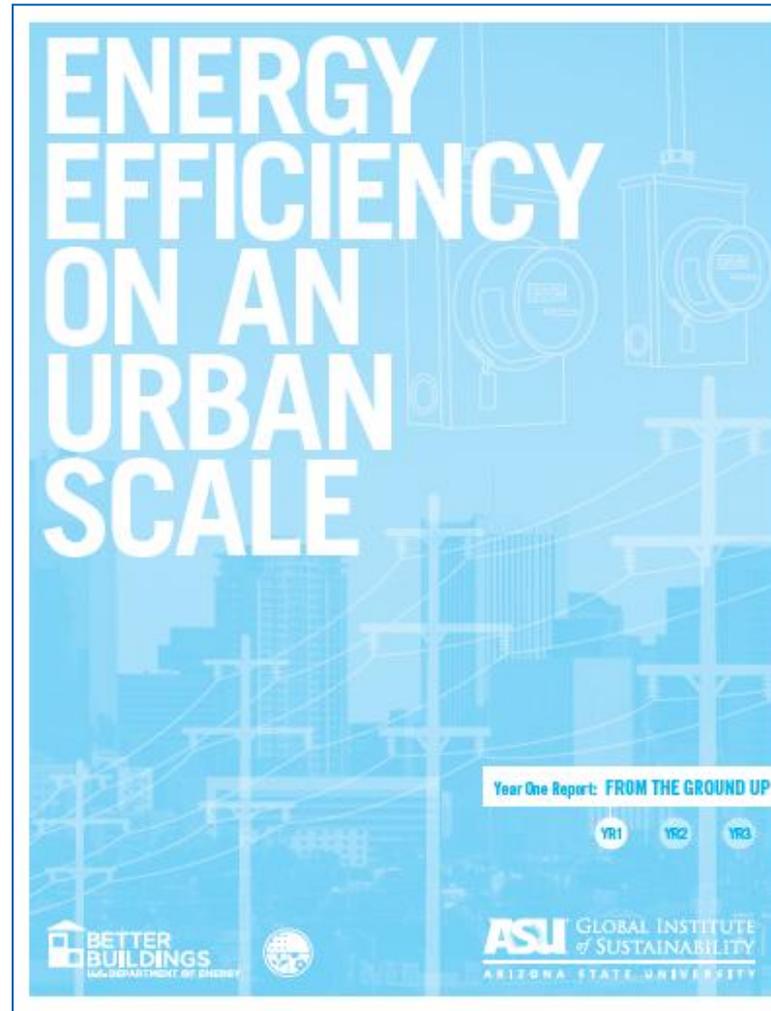
**Better Buildings Peer to Peer Best Practices Call
February 23, 2012**



Complex Variety of Data Sets



Energize Phoenix Annual Report



<http://energize.asu.edu/docs/gios/energize/EnergizePhoenixYear1Report.pdf>

- Program partner Arizona State University develops an annual report based on multiple data sources (see previous slides) and conducts data analysis for program evaluation and benefits assessment.
- Data collection and reporting were part of the program from the very beginning, which allowed the program to establish data partnerships early on (e.g., with utilities).
 - Customers sign release forms to allow access to utility data.
- The first annual report was released in October 2011 and sent to 500 people; the program received positive feedback, particularly from the “green building” community.
- The second report is scheduled to be released in August 2012.



Seattle Community Power Works Upgrade Progress Report

Current as of... 2/6/2011	Upgrades in Progress							Upgrades Completed			Upgrade Results					
	Initially Screened (#)	Full Assessment Completed (#)	Qualified for Financing (#)	Upgrades Under Construction	Total Upgrade Investment (k\$)	CPW Incentives (k\$)	CPW Loans Approved (k\$)	All Upgrades	Upgrades Achieving >15% Savings (#)	Total Upgrade Investment (k\$)	CPW Incentives (k\$)	CPW Loans Made (k\$)	Average Energy Savings per Project (%/mBTU/yr)	Energy Savings (mBTU/yr)	Cost Savings (k\$/yr)	Tons Carbon (mT/yr)
Total	2,100	1,120	105	425	5,268	340	50	198	198	1,806	62	116		1,659	28	111
Single family ¹	951	565	93	55	491	75	50	53	53	499	62	116	28%	1,659	28	111
Small Business	254	26														
Large commercial	32	7	3	1	891	72										
Hospital ²	4	4	2	2	3,324	193										
Multi-family ³	690	511	NA	366	Pending	Pending	NA	145	145	1,307	Pending	NA	Pending	Pending	Pending	Pending
Municipal ⁴	169	7	7	1	562											
¹ A single-family upgrade is counted as complete after the testout audit is performed. Excludes 15 upgrades completed under the Homewise program. Total investment including incentives but excluding taxes.																
² Hospitals are counted as fully assessed on approval of Strategic Energy Management Plans.																
³ The number multifamily units upgraded. CPW "incentives" are installation cost share paid to the Seattle Office of Housing Homewise Program.																
⁴ The number of buildings initially screened uses data on total number of buildings from the City's most recent green house gas inventory.													Data compiled by			

Evaluation Reports

CPW for Home 200-Day Progress Report_final 2-2-12.pdf

<http://www.energy.wsu.edu/ResearchEvaluation/SeattleCommunityPowerWorksProject.aspx>



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Green choices - A healthy home

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NOW SERVING ALL OF
SEATTLE



Energy Efficiency Jobs

CPW is generating new economic activity right here in Seattle.

- Through its work in the community, CPW has already created \$16 million of public and private local investment.
- 100% of contractors working on energy upgrades are local contractors. We're creating work, and it's staying here in our communities.

CPW is putting people to work.

- To date, over 20,000 hours of work have been performed using CPW money, and 226 people have received a paycheck on completed projects because of CPW (with hundreds more working on upgrade work in progress). This is work that wouldn't have been done without the program.

CPW has created opportunity for businesses to grow.

- The contractor pool for CPW for Home consists of 18% minority-owned business, 18% veteran-owned businesses and 10% women-owned businesses.
- 100% of our contractors working on homes and small business building upgrades are small, locally-owned businesses.

CPW jobs are good jobs.

The CPW program and its partners have created a set of standards that ensures that all jobs performed by contractors are living wage jobs.

RESOURCES:

- [Community High-Road Agreement](#)
- [Community High-Road Case Study](#)
- [Community High-Road Executive Summary](#)
- [Contractor Pool Re-opens; CPW for Home Application](#)

CPW Reporting on Jobs/Economic Benefits

- Program partner Washington State University hosts a “semi-public” website with program summary data (see previous slide), which is updated every couple of weeks through routine data collection.
- Data is used internally for program management and for weekly progress reporting.
- Much of the data comes from online applications filled out by customers through the program’s web portal.
- Challenges include:
 - Consistent definitions. For example, when is a project considered “completed”?
 - Keeping data consistent between multiple sources given the update cycle.
- Managing expectations about program performance is important. Seattle realized that it needed to do a better job of reporting projects in the “pipeline” rather than just completed project and adjusted its tracking and communications approach to give a more complete picture of program activity.

Seattle: Program Highlights and Insights



- Programs should use many channels to communicate. This includes dashboards, but also websites and regular internal reporting.
- Seattle's dashboard is mostly oriented toward program implementers rather than the general public. For communicating with the public, less is generally more.
- Seattle has found that the closer you are to trying to get to reporting outcomes in real time, the harder it is to get the numbers right and the more important it is to have strong quality assurance.

Discussion: How do programs handle quality assurance?

- Some data is already quality assured as part of the existing business process—audit reports, for example.
- Reporting consistency at the source can be a challenge. For example, contractors can collect and report several different types of cost numbers.
- For Seattle, the original idea was to automate much of the data collection to populate the dashboard, but the program found that significant human effort needed to go into quality assurance and data consistency before data could be reported via the dashboard.
- For Energize Phoenix, significant time goes into utility data quality assurance and modifying it for use in Energize Phoenix’s annual report. Utility data, for example, needs to be parsed and checked for consistency to accurately link it to certain households or buildings.

Discussion: What audiences are programs addressing through data collection and communication?



- The program in Sacramento, CA addresses multiple audiences (e.g., program administrators, local government, neighborhoods, etc.) and has developed a communications plan to identify audiences and messages.
- Sacramento also uses data for neighborhood challenge/reward programs
- The program in Austin, TX generates regular 1-2 page fact sheets for city council and fact sheets on customer feedback to the broader public.
- Boulder and Bainbridge provide “progress trackers” on their public websites, and Austin is planning to do the same (see examples later in this slide deck).
- Bainbridge Island provides a summary dashboard for the public and a more granular version for internal purposes (see example later in this slide deck).
- Several programs use the data for internal program management and regular internal updates for management and city officials.

Discussion: How are programs collecting information on jobs or other economic factors?



- Collecting data from contractors on hours worked doing assessments and retrofits. (Sacramento, Seattle, Boulder)
 - Collecting information on compliance with High Road Agreement. (Seattle)
 - Conducting an overall economic impact analysis based on direct and indirect impacts of program funding; using the REMI model. (Phoenix)
 - Receiving hiring reports from contractors. (Bainbridge Island)
 - However, it has been a challenge to get them on time, and it is an additional reporting burden on contractors. (Boulder is experiencing the same thing.)
 - Some people move from job to job and appear multiple times on jobs report; this raises concerns about double counting. (This may be due, in part, to individuals working for multiple companies.)
- In general, programs on the call were not calculating and publicly reporting quantitative data on the number of jobs created.
- Boulder, for example, collects job hours data but only talks about job creation qualitatively on its website.

Potential Future Call Topics

- Program Course Corrections Based on Evaluation Results
- Using Home Energy Scoring Systems
- Experience with Software/CRM Options

Suggested topic:

- How programs are tracking customer data in a way that can be accessed by contractors for leads on new jobs and data about completed jobs

Resources from Other Programs

Other Program Links

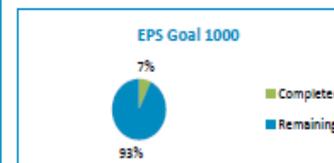
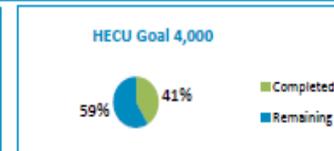
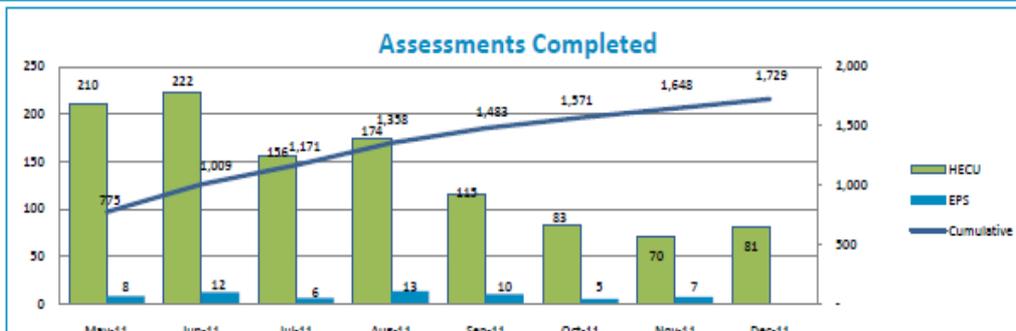
- Bainbridge Island Energy Dashboard (shows real-time energy use): <http://www.positiveenergybi.org/dashboard4>
- Efficiency Maine, “Year in Review” Annual Report (includes data and success stories): <http://www.energymaine.com/news/post/efficiency-maine-year-in-review-presentation>

Repower Bainbridge Dashboard and Website

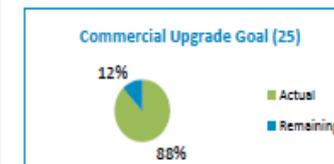
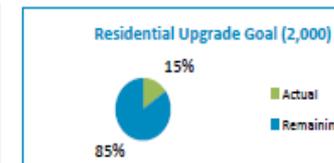
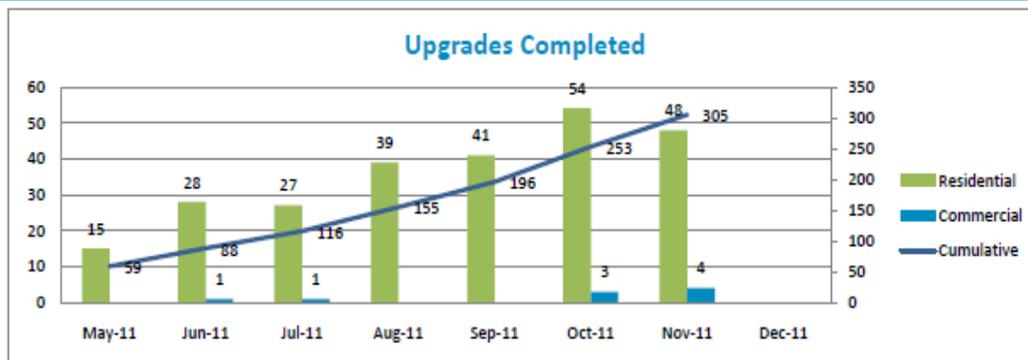
Following are two examples of dashboards used by Repower Bainbridge (Bainbridge Island, WA). The first dashboard is shared with the community. The second is used internally. Bainbridge also tracks progress on the home page of its website.

Progress Dashboard: December 2011

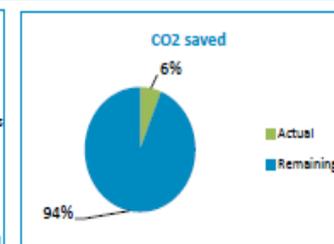
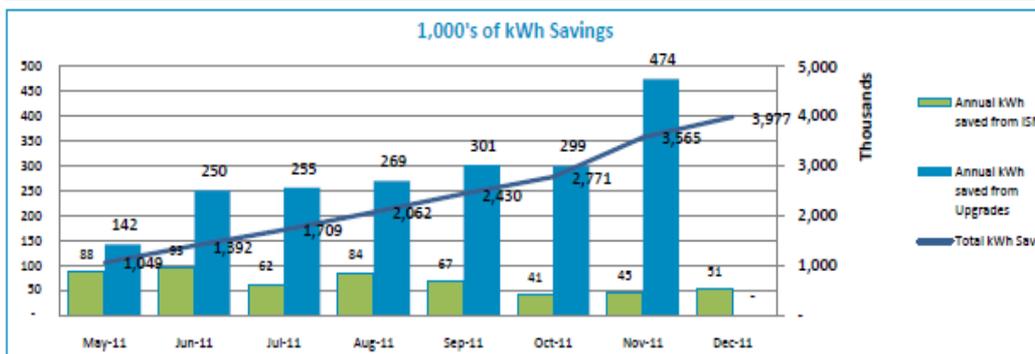
Energy Assessments



Energy Upgrades



kWh & Carbon Savings



Total Direct Installs

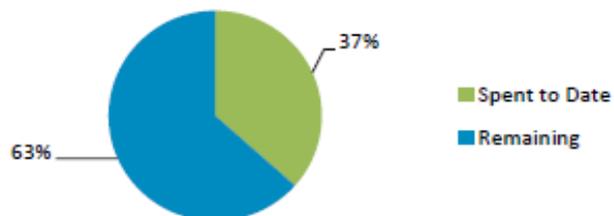
CFL Bulbs	19,710
Showerheads	448

Progress Dashboard: December 2011

Incentive Utilization

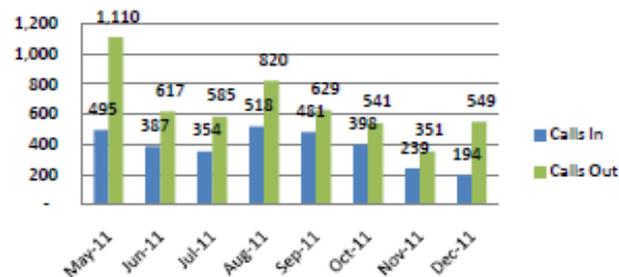
Bainbridge	Oil/LP Incentive		Reward Rebates	
	# of Rebates	Amt of Rebates	# of Rebates	Amt of Rebates
Jun	1	519	4	1,600
Jul	1	150	14	5,600
Aug	1	50	15	6,000
Sep			17	6,800
Oct			44	18,000
Nov	1	600	36	14,400
Dec	5	1,628	56	22,800
Totals	9	2,947	186	75,200

Total Funds Spent



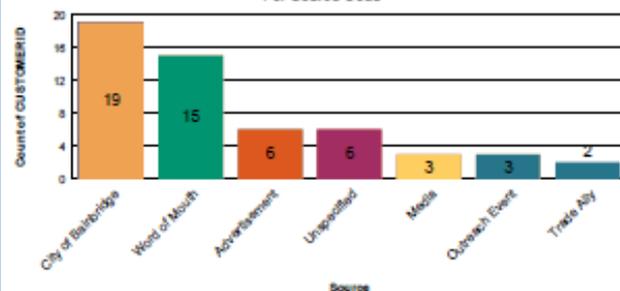
Call Center Performance

Calls per Month



TOP 10 SourceCode

For Source Code



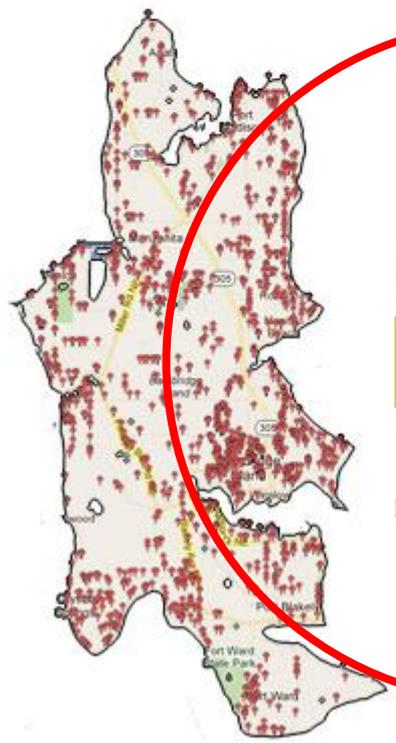
Loans Approved

	FY11Q1	FY11Q2	FY11Q3	FY11Q4
Total applications:		4	6	8
Approved:		2	6	5
Denied:		2	-	2
Issued:		1	4	4
Total dollar amt:		10,000	31,841	32,700

RE POWER BAINBRIDGE

- GET STARTED
- ABOUT US
- YOUR HOME
- YOUR COMMUNITY
- YOUR BUSINESS

RePower Bainbridge is a community-wide program dedicated to helping Islanders save energy, reduce costs, make their homes more comfortable, and create a more sustainable Island.



FREE Home Energy Check-Ups Completed

1,754

Total Goal: 4,000

Progress to Date: 44%

Your energy just got interesting!

The 'myenergy' logo features a stylized house icon with a bar chart inside, followed by the text 'myenergy' in a lowercase, sans-serif font.

Reward Yourself

Join RePower Bainbridge's effort to reduce our energy use by 15%. MyEnergy is your online resource for tracking and earning rewards at your favorite local and national companies or saving energy. [Learn more about MyEnergy](#) or [contact RePower Bainbridge](#) to be part of our retail network.

CLICK TO FIND OUT WHAT ENERGY-SAVING OPPORTUNITIES

A large, stylized dollar sign (\$) icon with motion lines around it, indicating savings or financial benefits.

EnergySmart Widgets (Boulder, Denver, and Garfield Counties, CO)

EnergySmart uses widgets on its website to communicate progress (e.g., number of rebates and total homes served). See:

<http://www.energysmartyes.com/home>



- Frequent Questions
- Rebates & Financing
- E for



"I was pleasantly surprised at my Advisor's knowledge and expertise. With a college degree related to homes and architecture, she sure knew..."

- Tom Van Lieu, Lafayette

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Home > EnergySmart for Home

EnergySmart: Your Efficiency Solutions
7 Videos in this Playlist

0:00

YouTube

Don't miss out on EnergySmart in Boulder County!

New Energy Efficiency and Solar Rebates Announced

Sacramento, California Program Tracking

This slide deck was described on the call by Christie Rodriguez, Sacramento Municipal Utilities District. Slide 3 illustrates data used for internal program tracking. Data is reported to the LA County program using standardized templates. Christie also described the program's communications plan.

Grant Reporting

Feb 1-16, 2011

Christie Rodriguez

February 16, 2011



Powering forward. Together.

Project Information

Better Buildings Program

SMUD joined with Los Angeles County, the City of San Diego, the City of San Francisco, the Association of Bay Area Governments and the California Center for Sustainable Energy to apply for a competitive “Better Buildings Program” Department of Energy American Recovery and Reinvestment Act (ARRA) Energy Efficiency and Conservation Block Grant.

The grant funds support the market transformation of building performance programs and development of neighborhood engagement strategies. The focus is on engaging two Sacramento neighborhoods (Rosemont & Downtown/East Sacramento) to achieve 20% energy savings per participating customer through comprehensive retrofits.

A mix of single family, multi-family, and commercial customers will directly benefit from this grant as the majority of the grant funds will go towards buying down the cost of energy retrofit work through rebates.

Goals

- *138 Single Family Homes*
- *84 Low Income Households*
- *286 Small Commercial Buildings*
- *6 Large Commercial Buildings*
- *50 Multi-Family Units*

Project Activities

Better Buildings Program

ACCOMPLISHMENTS

- LA County site visit completed December 14th
 - We were impressed by SMUD's organization. The presentations were outstanding and it is a pleasure to work with SMUD.
 - Thank you so much for being such a gracious hostess and ending our BBP monitoring visits on such a high note. I look forward to learning more about your best practices and the success in your program.
 - Thanks again for an outstanding, well organized and presented overview of your programs. We all enjoyed meeting you and your team!
- Revised budget to include: Single Family Program Admin (ConSol) and OSE labor to staff events
- Marketing resources have been secured
- Developed method to process Single Family rebates in-house in lieu of modifying Helgeson contract
- Established relationships with several Home Owner's Associations & Business Associations and presented program overviews and introduced contractors at meetings and other events
- Websites have launched and are in the process of being enhanced
- Article appeared in Theodore Judah PTA newsletter

ON GOING WORK

- Planning for upcoming speaking/sponsorship engagements and identifying opportunities for the future

Upcoming Events

Better Buildings Program

Feb. 15th

- Direct mail being sent to Rosemont homeowners

April 25th

- Rosemont Community Association Meeting

April

- Theodore Judah PTA Gala

April

- DOE Site Visit at LA

August

- Rosemont Annual Picnic

Fall

- Theodore Judah PTA Harvest Festival