



# **Better Buildings Residential Network Program Sustainability Mastermind Call: *Targeted Workforce Recruitment, Training, and Success in the Market***

*Call Slides and Discussion Summary*

March 13, 2014

# Agenda

- Welcome
- Introductions (go-around and assignment of numbers)
- Mastermind Format and Agenda
  - *Moderator: Jonathan Cohen, DOE*

## *Mastermind Session*

- Program Overview
  - *Host: Jim Mikel, Spirit Foundation*
- Questions and Answers
  - Participants ask clarifying questions about the program
- Idea Generation
  - Participants offer 2-3 new ideas/suggestions
- Host Report-out on Take-Aways and Action Items

# Call Participants

- BPI, Inc.
- Charlottesville, Virginia
- Chicago, Illinois
- Cincinnati, Ohio
- Clinton Climate Initiative
- Durham, North Carolina
- Greensboro, North Carolina
- Kansas City, Kansas
- Nevada
- Philadelphia, Pennsylvania
- Portland, Oregon
- Solar and Energy Loan Fund (St. Lucie County, FL)

# Better Buildings Residential Network

- **Better Buildings Residential Network**: Connects energy efficiency programs and partners to share best practices to increase the number of American homes that are energy efficient.
  - Membership: Open to organizations committed to accelerating the pace of existing residential upgrades. Commit to providing DOE with annual number of residential upgrades, and information about benefits associated with them.
  - Benefits:
    - Peer Exchange Calls
    - Tools, templates, & resources
    - Newsletter updates on trends
    - Recognition: Media, materials
    - Optional benchmarking
    - Residential Solution Center

For more information & to join, email [bbresidentialnetwork@ee.doe.gov](mailto:bbresidentialnetwork@ee.doe.gov).

- **Better Buildings Residential Network Group on Home Energy Pros**

Join to access:

- Peer exchange call summaries and calendar
- Discussion threads with energy efficiency programs and partners
- Resources and documents for energy efficiency programs and partners

<http://homeenergypros.lbl.gov/group/better-buildings-residential-network>

# Better Buildings Residential Network Group on Home Energy Pros Website

The screenshot shows a Firefox browser window displaying the 'Better Buildings Residential Network' group page on the Home Energy Pros website. The page is organized into several sections:

- Header:** Includes the 'Better Buildings' logo (U.S. DEPARTMENT OF ENERGY) and a brief description: 'The Better Buildings Residential Network connects energy efficiency programs and partners to share best practices and learn from one another to dramatically increase the number of American homes that are energy efficient.' It also lists the website URL, 39 members, and the latest activity from 6 hours ago.
- Helpful Links:** A list of links including 'Table of Contents', 'Better Buildings Residential Network', 'Better Buildings Neighborhood Program Website', 'Home Performance with ENERGY STAR', and 'Home Energy Score'.
- Discussion Forum:** Contains three recent posts:
  - Show Your Customers How Much You Love Energy Efficiency:** A post about Valentine's Day marketing campaigns, started by Better Buildings Support 6 hours ago.
  - Invite Your Colleagues to Join Home Energy Pros:** A post inviting participation in the network group, started by Better Buildings Support on Tuesday.
  - Help Your Customers Understand Heating Systems With Infographic:** A post about DOE's Energy Saver 101 infographic, started by Better Buildings Support on Jan 31.
- Members (39):** A grid of 39 member profile pictures, with a 'Follow New Members' button and 'Invite More' and 'View All' options.
- Pages (13):** A list of pages including 'Tools', 'Better Buildings Network', 'Peer Exchange Call Schedule and Archive', and 'Peer Exchange Archive: Market'.
- Home Energy Pros:** A sidebar section mentioning the group's founding by developers of Home Energy Saver Pro (sponsored by the U.S. Department of Energy) and its partnership with Home Energy magazine.
- Latest Activity:** A section showing recent group activity, including a search bar and posts like 'Elizabeth Snyder joined James Sayers's group' and 'Elizabeth Snyder joined Evan Mills's group'.
- Social Media and Energy Efficiency:** A section encouraging users to share how they reach customers and contractors using social media.
- Home Energy Ratings:** A section about calculating, visualizing, and explaining energy ratings.

The browser's address bar shows the URL: `homeenergypros.lbl.gov/groups/group/show?groupUrl=better-buildings-residential-network`. The page footer includes the 'Better Buildings' logo and the 'U.S. DEPARTMENT OF ENERGY' logo.

# Peer Exchange Call Series

- There are currently 6 Peer Exchange call series:
  - Data & Evaluation
  - Financing & Revenue
  - Marketing & Outreach
  - Multi-Family/ Low Income Housing
  - Program Sustainability
  - Workforce/ Business Partners
- Calls are held the 2nd and 4th Thursday of every month at 12:30 and 3:00 ET
- Upcoming calls:
  - Call #1
  - Call #2
  - Call #3
  - Call #4
- Send call topic ideas or requests to be added to additional call series distribution lists to [peerexchange@rossstrategic.com](mailto:peerexchange@rossstrategic.com).



# MasterMind

**Solving Problems,  
Exploiting Opportunities**



## **Andrew Carnegie Hired Napoleon Hill to tell his story of success**

**The result was the 1937 classic *Think and Grow Rich* in which the mastermind concept was introduced.**



**“If you want to be exceedingly successful,  
I would recommend these things:  
1) Know very clearly what you want  
2) Be a member of a Mastermind group”**

***Andrew Carnegie,  
America’s 1st billionaire, circa 1908***

# Description

A Mastermind Group is a meeting of individuals who focus their attention on solving a specific problem or exploiting an opportunity.

# Host

The individual who presents a problem or opportunity for the group to focus its attention and wisdom.

# Hosts Prepared to Present

History and accomplishments  
of grant funded program

Biggest problem or opportunity

# Value for the Host

By focusing the attention of a group on a specific issue, the host draws on a combined 100+ years of experience to receive solutions and ideas that address his or her situation.

# Value for the Participants

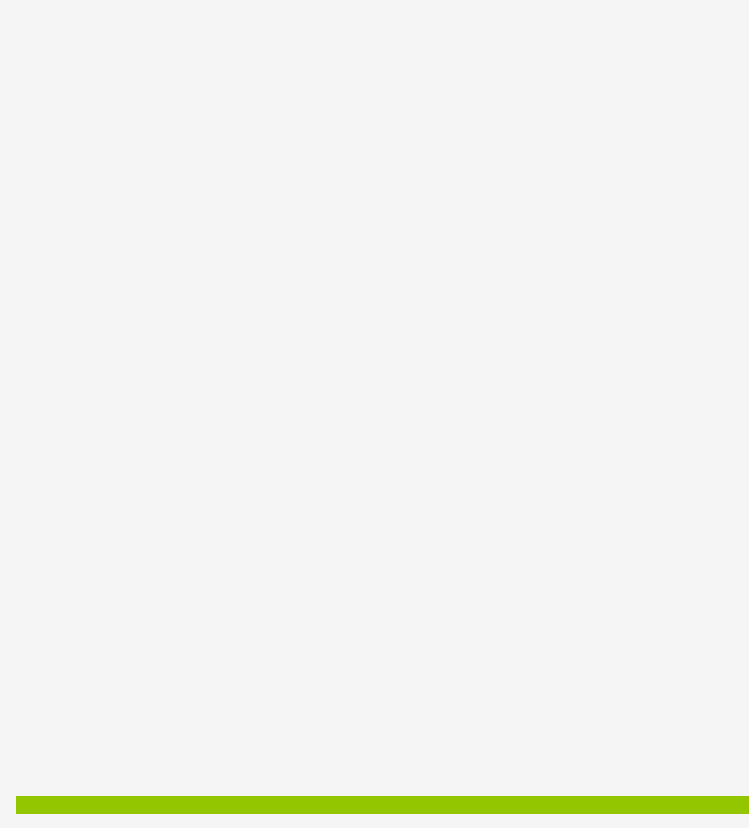
We all share common problems and opportunities. The ideas we generate for one will usually benefit all of us.

# Mastermind Session

- Program Overview (5 minutes)
  - Jim Mikel, Spirit Foundation
- Questions and Answers (10 minutes)
  - Participants ask clarifying questions about the program
- Idea Generation (45 minutes)
  - Participants offer 2-3 new ideas/suggestions
- Host report-out on Take-aways and Action Items (10 minutes)



A U.S. Department of Energy Home Energy Score Partner  
Wounded Hero Project





# Qualified Assessor Program

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- Spirit Foundation, A U.S. Department of Energy Home Score Partner is coordinating national release of our Qualified Assessor Programs.

“We have a great package!”

- Qualified Assessor Training
  - U.S. Department of Energy Home Energy Score Qualified Assessor/BPI Rater
  - NABSEP Solar Qualified Assessor
  - U.S. Department of Energy Commercial Building Score Qualified Assessor
  - U.S. Forest Service Arbol Qualified Assessor
  - National Center for Healthy Homes Qualified Assessor
  - EPA Water Sense Qualified Assessor
  - LED Lighting Qualified Assessor

- We have worked with Wounded Warrior battalions and the U.S. Department of Defense, U.S. Department of Labor, and many others over the past 5 years, preparing for 2014.
- 1.6 million Veterans returning home over the next three years.
- 800,000 Veterans are exiting the armed forces.



## Veterans & Wounded Heroes

Spirit Foundation has released a line of apparel going into commissaries nationally.

The revenue from the apparel enables Wounded Heroes to receive scholarships for training.

# Qualified Assessor

- Offers an up-front Home Energy Score or Commercial Building Score
- Add-on assessments for additional fees are offered by the Qualified Assessor/Spirit Technician, AKA “Spirit Tech”

# Jim Mikel, Chairman



[TRAINING PROGRAMS](#) [ABOUT SPIRIT](#) [SPIRIT PRODUCTS MADE IN AMERICA](#) [DONATE](#)

**Request a Free Green Ribbon**

Spirit Foundation is currently coordinating efforts with the armed forces to train and hire wounded warriors to participate in the U.S. Department of Energy's Home Energy Score program.

**Support Wounded Warriors** >

A black and white photograph of a soldier in full combat gear carrying a wounded warrior in his arms. The soldier is in a crouching position, supporting the warrior who is being carried.

Spirit Foundation is a 501(c)(3) not for profit. All donations are tax deductible as allowable by law.

## Free online Training Programs

Spirit Foundation offers three career paths to a sustainable future: Home Energy Score Qualified Assessor; LED Qualified Assessor; and A/C Qualified Assessor. Sign up for our next live online training session by clicking on the Training tab at the top of the page, or contact us for more information.

[More About Spirit Foundation](#) >

## Help the Wounded Warriors coming home!

Spirit Foundation is working with Wounded Warrior battalions, creating sustainable careers for our Heroes who fought for our freedom. Building a strong work force of knowledgeable, qualified men and women is the start of improving lives.

Together with your help, Wounded Warriors have a future in energy efficient careers. Spirit Foundation needs volunteers in your area to

## Wounded Hero Project® (WHP)

Wounded Hero Project® (WHP) began as a vision to help veterans. This vision has become a reality and includes legislative efforts to support sustainable careers for veterans, to provide comfort items to wounded service members, and has grown into a complete rehabilitative effort to assist warriors as they transition back to civilian life.

Wounded Hero Project® (WHP) takes a holistic

# American Made Products

- LEDs
- NEST
- SOLAR
- Spirit Cleaners
- Over 3000 sustainable products – all made in America

# Program Challenges

1. What opportunities or challenges are there for offering complementary services along with energy efficiency (e.g., solar, healthy homes, etc.)?
2. What kind of messaging and communications strategies encourage homeowners to undertake upgrades in newer markets for energy efficiency?
3. When working with a specific target workforce audience, what are effective strategies for recruiting and training individuals for success in conducting assessments and upgrades? *(Not discussed)*



# Challenge 1

- What opportunities or challenges are there for offering complementary services along with energy efficiency (e.g., solar, healthy homes, etc.)?

# Challenge 1 Idea Summary: Opportunities for offering complementary services along with energy efficiency

- Recognize that the scope of the home assessment (i.e., what aspects of a home are assessed?) is key for driving demand for complementary services; assess multiple topics with one visit
- Tap sources of potentially promising leads, such as:
  - Databases of homeowners using utility billing assistance (these are mostly lower income households that are in need of services)
  - Local food groups
- Leverage demand opportunities, such as homeowners suffering through a long winter of high energy bills
- Offer homeowner support:
  - Focus on education of homeowners; hold workshops on understanding home systems, utility bills, and the benefits of upgrades
  - Use general contractors or energy advisors to help homeowners through process
- Find ways to drive down costs
  - Offer project financing for smaller-sized projects (e.g., \$1500-\$3500 range)
  - Seek local/state government funding to offer financial incentives

# Challenge 1 Idea Summary: Overcoming challenges of offering complementary services along with energy efficiency

- Recognize that providing multiple services can be costly—and it can be challenging to get homeowners to understand the benefits of all services
- Be transparent and fair in distributing leads among independent contractors
- Determine who will contribute to the costs of providing complementary services (e.g. integrating healthy homes)
- Recruit and vet enough assessors to provide complementary services and still offer homeowners a choice

# Challenge 2

- What kind of messaging and communications strategies encourage homeowners to undertake upgrades in newer markets for energy efficiency?

# Challenge 2 Idea Summary: Messaging and Communications Strategies

- Educate homeowners about multiple energy efficiency measures and their relative benefits
- Advertise the expertise of the assessor and upgrade contractor
- Communicate the financial benefits of undertaking home energy upgrades (note that you may need to adjust messaging based on what financial incentives are available)
  - Discuss pay-back periods
  - Show people actual energy savings (e.g., on the bill when using utility bills to pay financing)
  - Emphasize the investment in home equity and increasing the value of the property
- Discuss the many benefits of energy efficiency upgrades:
  - Comfort
  - Health and safety
  - Home equity
  - Investing in the community

# Challenge 2 Idea Summary: Messaging and Communications Strategies, continued

- Listen to people about what they want for their homes
  - Figure out what will motivate the customer (note that this may be different in different markets and from home to home)
- Position the program as an advocate for the homeowner
- Move from awareness to action; get people engaged in their own homes through simple steps they can take on their own, and then link them to deeper projects with contractors
- Use trusted advisors, such as:
  - Neighbors talking to neighbors; train residents to become part of the outreach team (note: transient populations impact effectiveness of the neighbor-to-neighbor approach)
  - Peer testimonials
  - Local newspapers that are trusted by homeowners
  - Employee events

# Key Host Take-Aways

- Ensure marketing messages include home comfort, health and safety, and increased home value from energy efficiency upgrades
- Understand different financing options and opportunities in different locations
- Educate homeowners and their families—not just adults but also children (school-age to college)

# Thank you for participating!

- If you would like to volunteer to be a host for a future Mastermind session, please let us know via the GoToMeeting “Questions” functionality or email [peerexchange@rossstrategic.com](mailto:peerexchange@rossstrategic.com)