Better Buildings Residential Network Peer Exchange Call Series:

*Best Practices for Fostering and Using Contractor Networks (101)*

July 28, 2016

*Call Slides and Discussion Summary*
Agenda

- Agenda Review and Ground Rules
- Opening Polls
- Brief Residential Network Overview
- Featured Speakers
  - Marc Bigby, Engagement Services Manager, Build It Green *(Network Member)*
  - Kelsey Horton, Senior Building Policy Associate, Midwest Energy Efficiency Alliance *(Network Member)*
  - Susan Thompson, Strategic Planning Manager, Efficiency Vermont *(Network Member)*
- Discussion
  - How do you ensure that contractor networks work for both energy efficiency programs and participating contractors?
  - What services/support can contractor networks provide to less experienced contractors?
  - What are best practices for how programs decide where to focus their time/support for contractors in the network?
  - How do programs deal with customer complaints about participating contractors?
  - Other questions/issues related to contractor networks?
- Closing Poll and Upcoming Call Schedule
Better Buildings Residential Network: Connects energy efficiency programs and partners to share best practices and learn from one another to increase the number of homes that are energy efficient.

Membership: Open to organizations committed to accelerating the pace of home energy upgrades.

Benefits:
- Peer Exchange Calls 4x/month
- Tools, templates, & resources
- Recognition in media, materials
- Speaking opportunities
- Updates on latest trends
- Voluntary member initiatives
- Residential Program Solution Center guided tours

Commitment: Provide DOE with annual number of residential upgrades, and information about associated benefits.

For more information or to join, email bbresidentialnetwork@ee.doe.gov, or go to energy.gov/eere/bbrn and click Join
Best Practices: Build It Green (California)
Fostering & Engaging Contractors

Marc Bigby
Engagement Services Manager
7/28/16
About Build It Green

Build It Green’s Mission is to help professionals adopt green practices and grow the market for efficient, healthy homes.

BuildItGreen.org
About me
Mentoring the 20%
Engaging the 80%
Benefits
Contractor Support

Trust

Advocacy
**Best Practices: Build It Green**

**Know your network:** Oftentimes, 20% of your contractors account for 80% of the work being completed.

- Programs can grow not just by expanding program offerings, but also by helping contractors better utilize existing offerings.
  - **Training and Mentorship:** Support contractors by bringing in industry experts (e.g., business operations, sales, quality assurance, marketing) to speak at trainings.
  - **Outreach:** Building a contractor network requires extensive marketing. Site visits, regional forums, events, and phone calls are a **great way to reach out to contractors**.

- Building a relationship with contractors not only builds the network, it helps you **understand their business model and perspective**.
  - Not all contractors have the same structure. If you design a program around a single contractor business model, your program may not work for many businesses. **Contractor feedback and insight should inform program design.**
Best Practices: Midwest Energy Efficiency Alliance (MEEA) and Illinois Home Performance
We are a nonprofit membership organization with 160+ members, including:

- Utilities
- Research institutions
- State and local governments
- Energy efficiency-related businesses

As the key resource and champion for energy efficiency in the Midwest, MEEA helps a diverse range of stakeholders understand and implement cost-effective energy efficiency strategies that provide economic and environmental benefits.
Illinois Home Performance
2011 - Present

- Illinois’ version of national Home Performance with ENERGY STAR® program
- Statewide platform for whole home retrofit programs
- Statewide Sponsor: Illinois Department of Commerce and Economic Opportunity (grant with ratepayer funding)
Contractor Resources

- Trainings + Training Rebates
- Online Portals
- Building Science Hotline
- Equipment Loan Program + Discounts
- Co-Branding
- Newsletter
Contractor Support in Action
Lessons Learned

• IHP experiences the 80 / 20 rule
  – Our unique position means we can still support all contractors
• Providing resources to contractors not yet in network creates a funnel of qualified contractors
• Check in with contractors to ensure resources are useful
Thank you!

Kelsey Horton
Midwest Energy Efficiency Alliance
Best Practices: Illinois Home Performance

- **Open Network**: Illinois Home Performance (IHP) has offerings for member and non-member contractors, which allows access new contractors while still making membership valuable to participants.
- **Member benefits** include access to utility rebates for customers and program-branded materials.
- **Non-Member offerings** include resources aimed at outreach and education:
  - **Training**: Experts host one-day trainings around the state.
  - **Educational Rebates**: IHP provides rebates for the cost of taking BPI classes or other certifications.
  - **Equipment Loan**: Contractors can check out equipment from blower doors to infrared cameras.
  - **Building Science Hotline**: The hotline provides contractors with access to a building science expert that can provide real time answers to their questions.
Best Practices: Efficiency Vermont
Goals of the EEN

- Develop a **strong long-term partnership and network** with trade allies;

- **Proactively work with contractors** to encourage energy efficiency equipment and opportunities in their work;

- **Support and stay in touch** with our key partners;

- **Increase educational opportunities** for contractors;

- **Identify and differentiate** contractors with dedication to efficiency and quality.
Benefits to Contractors

• Leads and referrals
  • Business listing on Efficiency Vermont website

• Trainings
  • Technical trainings and support

• Differentiate
  • Marketing resources
  • Financing Opportunities
  • Co-Op Advertising
Efficiency Excellence Network

EEN Participation Requirements

- 5 Professional Credits
- EVT Overview Training + 1 EVT-hosted Skills Training per year
- 2 Client References
- 1 Project/Yr
- Sign Agreement and 1 or more Addendums

Basic Business Requirements

Trade Groups

- HVAC
- Refrigeration
- Electrical
- Home Performance
- Heat Pumps
- Retro-Commissioning
- Residential New Construction
- Thermal Renewables
EEN Trade Group: Home Performance with Energy Star

Requirements:

- Adhere to HPwES program requirements
- Attend HPwES/BP Annual Contractor meeting
- Complete at least (4) HPwES and/or Building Performance projects per year
# The EEN Today

<table>
<thead>
<tr>
<th>EEN Members</th>
<th>180</th>
</tr>
</thead>
<tbody>
<tr>
<td>Who are they?</td>
<td>(29) Lighting (26) Refrigeration (97) HVAC (51) HPwES (27) Heat Pump</td>
</tr>
<tr>
<td># of EEN Trainings completed</td>
<td>16</td>
</tr>
<tr>
<td>Engagement and Communication</td>
<td>• Quarterly Newsletter • Bi-monthly Program Updates • Face to Face • Annual appreciation event • Better Buildings By Design</td>
</tr>
</tbody>
</table>
Summary

• Networks provide a strong model of continuous engagement and communication.

• Engaging contractors can be difficult
  – Face to Face engagement is important.

• Contractors value the support of a network.
  – A training calendar is a real value add.

• Establish clear expectations around requirements and performance for remaining in network.

• Gather feedback and input from contractors.

• Establish clear internal processes for managing the network.
Best Practices: Efficiency Vermont

- A network is a great way to **develop long term partnerships** with contractors.
  - **Grow the network:** Efficiency Vermont lists network contractors on its website and offers a low-interest Heat Saver Loan to customers that use network contractors.
  - **Maintain the relationship:** Efficiency Vermont provides technical training, appreciation events, and provides discounts to annual conferences.
- **Be clear about requirements:**
  - **Internal:** Managing a network involves many moving pieces. Develop clear roles and responsibilities internally to avoid oversight and error.
  - **External:** Communicate the requirements for inclusion in the network and actively gather feedback to ensure quality of the program and meaningful support of contractors.
Resources related to home performance contractor networks:

- Explore the [Contractor Engagement & Workforce Development – Identify Partners](https://rpsc.energy.gov) handbook to learn about building and enhancing contractor relationships.

- The [Contractor Engagement & Workforce Development – Deliver Program](https://rpsc.energy.gov) handbook provides step-by-step instructions on recruiting contractors and working with them to deliver home energy upgrades.

- The “Establish collaborative partnerships with contractors and communicate with them early and often” tip discusses how programs have fostered relationships with contractors.

- While you’re there, see the latest [Proven Practices](https://rpsc.energy.gov) post on [Contractor Selection](https://rpsc.energy.gov).

- The Solution Center is continually updated to support residential energy efficiency programs—**member ideas are wanted**!
Solution Center Seeks Focus Group Volunteers

- Do these criteria describe you?
  - I have used the Solution Center to look for information
  - I am an program administrator or in a decision-making role for a residential energy efficiency program

- If interested, please respond in the chat field, or email BBRPSolutionCenter@ee.doe.gov (by 7/29) with:
  - Name
  - Email address & phone number
  - Organization & title/role

- WHEN: Focus group will take place the week of Aug. 15 by conference call. Time commitment ~1 hour
Discussion

**Outreach:** Face-to-face interaction is key to building a relationship.

- Meet contractors where they are:
  - **Early Bird:** Schedule trainings and networking events early in the morning to work around contractor hours.
  - **Trainings:** Educational offerings are a great way to introduce contractors interested in home performance to your program.

- From a contractor perspective, programs can feel like a wizard behind the curtain. **Designate individuals within your program to consistently interact with contractors.**
  - Designated **account managers** responsible for calling, emailing, and visiting contractors can **strengthen relationships**.
  - Once contractors understand who their “person” is, they know exactly how to get program information and **stay engaged**.
Peer Exchange Call Series

We hold one Peer Exchange call the first four Thursdays of each month from 1:00-2:30 pm ET

Calls cover a range of topics, including financing & revenue, data & evaluation, business partners, multifamily housing, and marketing & outreach for all stages of program development and implementation

Upcoming calls:
- August 4: Energy Efficiency Olympiad: Best Practices from Around the World (201)
- August 11: Gold Medal Approaches for Obtaining and Using Energy Efficiency Data (101)
- August 18: Vinicius, Quatchi, and You: Using Power Words and Branding to Increase Interest and Participation (301)
- No call scheduled for August 25

Send call topic ideas to peerexchange@rossstrategic.com
See the Better Buildings Residential Network Program website to register
Addenda: Attendee Information and Poll Results
Call Attendee Locations
Call Attendees: Network Members (1 of 2)

- BKi
- Building Performance Center, Inc.
- Center for Sustainable Energy
- City of Plano
- CLEAResult
- Cleveland Public Power
- County of San Luis Obispo
- CSRA
- Ecology Action
- Elevate Energy
- Energy Response Corps
- Energy Services Group
- EnerScore Inc.
- Enhabit
- Focus on Energy
- GoodCents
- Holy Cross Energy
- ICF
- Mitsubishi Electric Cooling and Heating
- Montana Department of Environmental Quality (DEQ)
- New York City Energy Efficiency Corporation (NYCEEC)
- New York State Energy Research and Development Authority (NYSERDA)
Call Attendees: Network Members (2 of 2)

- Parker Interests Unlimited
- PG&E
- Rocky Mountain Institute
- Snohomish County PUD
- Solar and Energy Loan Fund (SELF)
- Sonoma County Energy Independence Program (SCEIP)
- Sprayrock Building Systems, LLC
- The Oberlin Project
- TRC Energy Services
- U.S. Department of Housing and Urban Development
Call Attendees: Non-Members

- Air Conditioning Contractors of America
- ASC Energy
- BA Consult
- County of Sonoma-Energy & Sustainability
- Department of Public Utilities, Massachusetts
- Eco Energy
- EfficiencyOne
- Flathead Electric Cooperative
- Hot Water Solutions
- New Leaf Home Design

- Off The Grid Renovations
- Ryan Taylor Architects LLC
- Thermostat Recycling Corporation
- XLR8SUN
Opening Poll #1

Which of the following best describes your organization’s experience with contractor networks?

- Some experience/familiarity – 34%
- Very experienced/familiar – 32%
- Limited experience/familiarity – 18%
- No experience/familiarity – 16%
- Not applicable – 0%
Opening Poll #2

Which choice best represents your organization's role?

- Energy efficiency program administration and support – 54%
- Other (please explain) – 16%
- Energy auditor, contractor, or service provider – 11%
- Equipment manufacturer – 11%
- Research, education, or advocacy organization – 8%
Closing Poll

After today's call, what will you do?

- Consider implementing one or more of the ideas discussed – 48%
- Seek out additional information on one or more of the ideas – 36%
- Make no changes to your current approach – 16%
- Other (please explain) – 0%