



**Better Buildings Residential Network Peer  
Exchange Call Series: *Secret Sauce: Recruiting  
and Retaining Qualified Contractors (101)***

October 6, 2016

*Call Slides and Discussion Summary*

# Agenda

- Agenda Review and Ground Rules
- Opening Polls
- Brief Residential Network Overview
- Featured Speakers
  - **Scott Bloedorn**, Residential Efficiency Program Lead, Focus on Energy, Wisconsin
  - **Julie Saporito**, Program Administrator, City and County of Denver (*Network Member*)
- Discussion
  - What are effective ways to attract contractors to participate in residential energy upgrade programs?
  - How can programs keep top-performing contractors happy so they continue to participate and do high-quality work?
  - How do you make program administration work for both the program and participating contractors?
  - Other questions/issues related to contractor recruitment and retention?
- Closing Poll and Upcoming Call Schedule

# Better Buildings Residential Network

**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](mailto:bbresidentialnetwork@ee.doe.gov), or go to [energy.gov/eere/bbrn](http://energy.gov/eere/bbrn) and click Join*

# Best Practices: Focus on Energy, Wisconsin



**focus on energy**<sup>sm</sup>

Partnering with Wisconsin utilities

**Scott Bloedorn**

**Focus on Energy - Wisconsin  
Residential Programs Lead**

..... Saving Energy and Money For Wisconsin .....

# About Focus on Energy

- Focus on Energy is Wisconsin utilities' statewide energy efficiency and renewable resource program.
- We recently celebrated our 15 year anniversary!
- Over 2,500 contractors have participated in our residential programs since 2012.

# Contractor Recruitment

- What do you have to offer?
  - Incentives/Rebates
  - Leads
  - Brand recognition
  - Legitimacy
  - Competitive advantage over competition
  - Training/Certifications

# Contractor Retention

- How do we keep them satisfied and motivated?
  - Personal attention
  - Recognition for achievements
  - Listening to their concerns
    - Trade Ally Advisory Group (TAAG) meetings
    - Feedback loops



# Presentation Highlights: Focus on Energy – Wisconsin

**Network Benefits:** Providing contractors benefits for participating in the network is an important first step in recruitment:

- **Leads:** Money talks, and incentives are valuable, but providing leads also impacts a contractor's bottom line.
- **Legitimacy:** Customers that look for contractors via the program network expect high quality.
- **Advantage:** Contractors pay close attention to competition. If a competitor is offering incentives from the program to their customers, contractors will want those offerings as well.
- **Branding:** Cooperative advertising can help subsidize the cost of materials for contractors and ensure the program brand is seen.

**Don't sacrifice quality for quantity:** Mistakes happen when you are casting wide net trying to get contractors into the program.

- **Use caution and quality assurance when handing out your affiliation.** Take advantage of resources such as Angie's List or Better Business Bureau to vet applicants.

# Best Practices: City and County of Denver

# CONTRACTOR PARTICIPATION AND RETENTION

## DENVER ENERGY CHALLENGE PROGRAM



JULIE SAPORITO, PROGRAM MANAGER  
CITY & COUNTY OF DENVER



# RESIDENTIAL PROGRAM BACKGROUND

- Energy efficiency program administered by the City and County of Denver (3<sup>rd</sup> party implementer is CLEARresult)
- Target audience: Denver residents (low-income residents are served by another department)
- Elements include:
  - Energy advisor (free service, no audit required)
  - Energy loans
  - Vetted contractor pool
- No rebates
- No free upgrades



# PARTICIPATION AND RECRUITMENT

## THEN

- Original pool was managed by the City = too many companies listed, little differentiation
  - Recruitment was fairly easy because we were a new program and no requirements
  - Rebates enticed participation but weren't around long

## NOW

- CLEAResult manages current pool for Denver, Boulder and others along Front Range
- Budget dictates how many contractors are in our pool so recruitment isn't as necessary
  - Word of Mouth referrals from residents
- Boulder County's EnergySmart program offers rebates which helps with retention



**DENVER**  
ENVIRONMENTAL HEALTH



**energySMART**  
Your Efficiency Solutions



**denver**  
**energy**  
CHALLENGE

# REQUIREMENTS

- License and Certification requirements appropriate in communities served
- BPI Manager on staff
- Licensed to perform CAZ testing
- Approved contractor with local utility (Xcel Energy)
- Maintain minimum of 75 point score to stay in program (out of 100)
  - Follow Program and Installation Standards
  - Inspection failures
  - Customer service
  - Complete 1 job every 6 months to stay in pool



# CONTRACTOR BENEFITS

- Lead generation
- Workforce training
- Quality Assurance checks on insulation jobs
- Promotion/Co-Branding
- Program rebates (EnergySmart)
- Pool established “installation guidelines” applicable to our region, higher standards
- Access to best practice documents which takes load off contractors to develop on their own
- Participation is FREE for them!



# SUCCESSSES

- Pooled resources across different programs help bring down costs
  - Leverage resources to offer workforce development trainings
  - Train and coordinate same companies across different programs for consistency
- Ability for program to obtain customer feedback and stay on top of homeowner experiences, especially when issues arise
- Ongoing idea exchanges with other contractors and experts





# REPORT CARD GIVEN MONTHLY TO CONTRACTORS

- Total homes upgraded and measures completed (min of 1 job every 6 months required)
- Contractor Score
- QC performed
- Number of corrections notices sent
- Number of Sign-off sheets missing
- Investment by customer
- Rebates processed by using the service
- Cost of projects covered by Energy Loan



# CHALLENGES

- Leads tend to be one-way (from program to contractor)
- Ongoing cost to local government in order to have a 3<sup>rd</sup> party manage
- Fine line between too many and too few in the pool
- Haven't cracked the nut in having contractors promote financing product(s) more regularly



# THANK YOU

Julie Saporito, Program Manager  
City & County of Denver



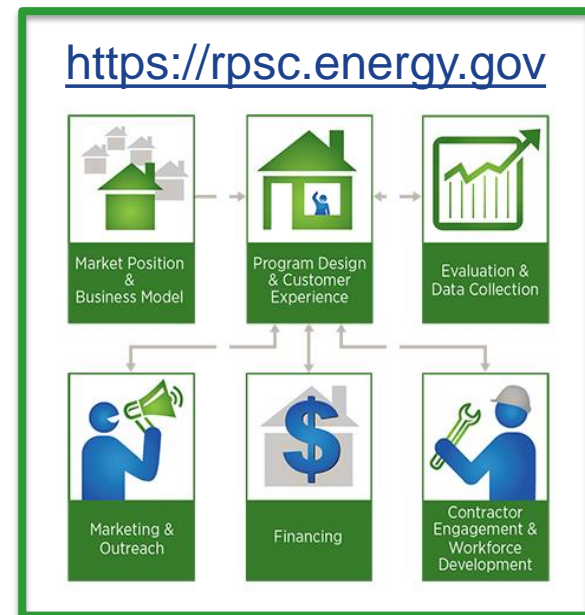
# Program Highlights: City and County of Denver

- **Quality:** Government agencies are not able to endorse one company over another, so **program design should incorporate sufficient requirements to ensure the quality** of contractor applicants.
  - The City and Country of Denver realized that its initial open program did not do enough to vet contractors, and it proved to be a big burden to administer. By revamping the program with requirements to ensure quality, they were able to transition the program without “kicking out” contractors.
- **Resources:** Although third-party implementers are costly, internalizing the time and cost of administering a contractor network may outweigh the benefit of in-house implementation.
- **Feedback:** Contractor **report cards can be a useful tool for drawing contractor’s attention to their impact** and standing within the program. Denver has just launched a report using contractor input on useful measures to evaluate.

# Related Resources in the Residential Program Solution Center

Explore resources related to recruiting and retaining qualified contractors:

- Explore the [Contractor Engagement & Workforce Development – Identify Partners](#) handbook for information & tools to assess potential contractors, develop recruitment strategies, & establish ongoing relationships.
- See the [Tip for Success](#) and its programmatic examples for establishing partnerships with contractors and communicating with them early & often.
- Check out the [Spotlight on Portland, Oregon](#) about making the program work for contractors.



- While you're there, see the latest [Proven Practices](#) post on [Contractor Financing Education](#).
- The Solution Center is continually updated to support residential energy efficiency programs—[member ideas are wanted!](#)

# Discussion Highlights

- When expanding your network, **avoid the temptation to grow rapidly**. Instead, focus on contractors that provide quality service.
- Contractors are busy! **Be mindful of the amount of time the program requires** from contractors.
- To keep pace, **use forms of communication that reach contractors where they are**, such as cell phone calls and in-person visits.
- **Streamline the program for contractors** by dedicating a staff member as their single point of contact to guide them through the program and answer questions.
- **Staff your contractor recruitment position with a former contractor** to gain valuable insights into their work and needs.
- **Create space for contractors to open up and give meaningful feedback** by hosting focus groups that last a few hours. By lunchtime, they may be more willing to share than in the first hour.

# Spread the Word!

## Do you have new staff in your organization that might benefit from Peer Exchange Calls?

*Network Members, such as VEIC, inform their new employees of upcoming calls to spread the knowledge and grow the network!*

*New staff can sign up to receive upcoming call information. To do so, email [bbresidentialnetwork@ee.doe.gov](mailto:bbresidentialnetwork@ee.doe.gov), or visit [energy.gov/eere/bbrn](http://energy.gov/eere/bbrn) and click Join*

# 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:

- October 13: Moving Beyond Split-Incentives: Engaging Rental Property Tenants and Owners in Energy Efficiency (301)
- October 20: Here Comes the Sun: Advances in Residential Solar (301)
- October 27: Connect 4: Energy Efficiency in Relation to Other Program and City Goals (101)

*Send call topic ideas to [peerexchange@rossstrategic.com](mailto:peerexchange@rossstrategic.com)*

*See the Better Buildings Residential Network Program [website](#) to register*



# Addenda: Attendee Information and Poll Results



# Call Attendees: Network Members

- American Council for an Energy-Efficient Economy (ACEEE)
- Boulder County
- Bridging The Gap
- California Center for Sustainable Energy
- Center for Energy and Environment (CEE)
- Center for Sustainable Energy
- City of Fort Collins
- City of Providence
- CLEAResult
- Efficiency Nova Scotia
- Efficiency Vermont
- Mountain Association for Community Economic Development
- New York State Energy Research and Development Authority (NYSERDA)
- TRC Energy Services
- U.S. Department of Energy (DOE)
- Vermont Energy Investment Corporation (VEIC)
- Wisconsin Energy Conservation Corporation (WECC)

# Call Attendees: Non-Members

- BKi
- Carolina Smart Homes
- City of Milwaukee
- EfficiencyOne
- Emerald Cities Seattle
- Environmental Design / Build
- Minnesota Pollution Control Agency
- Pratt center for Community Development
- Renew Financial
- Snohomish County PUD
- State of Delaware
- The Energy Network
- University of North Texas
- Ventura County Regional Energy Alliance

# Opening Poll

- Which of the following best describes your organization's experience recruiting and retaining qualified contractors?
  - Very experienced/familiar – **42%**
  - Some experience/familiarity – **26%**
  - Limited experience/familiarity – **19%**
  - Not applicable – **13%**
  - No experience/familiarity – **0%**

# Closing Poll

- After today's call, what will you do?
  - Seek out additional information on one or more of the ideas – **60%**
  - Consider implementing one or more of the ideas discussed – **40%**
  - Make no changes to your current approach – **0%**
  - Other (please explain) – **0%**