



Better Buildings Residential Network Peer Exchange Call Series: *Two Is More Than One: Leveraging Strategic Partners*

April 20, 2017

Call Slides and Discussion Summary

Agenda

- Agenda Review and Ground Rules
- Opening Polls
- Brief Residential Network Overview and Upcoming Call Schedule
- Featured Speakers
 - **Kimi Narita**, Deputy Director, City Energy Project, Natural Resources Defense Council
 - **Paul Markowitz**, Community Energy Program Manager, Vermont Energy Investment Corporation (VEIC) (*Network Member*)
- Discussion
 - How has your organization leveraged strategic partnerships?
 - Did your organization evaluate the results of these partnerships against agreed goals?
 - What are keys to successful partnerships? What advice or recommendations can you offer in identifying suitable partnerships?
 - What challenges have you encountered in trying to establish strategic partnerships? What strategies have helped your program overcome those challenges?
 - Other questions/issues related to strategic partnerships?
- Closing Poll

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, or go to 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:

- April 27: [Just What the Doctor Ordered: Integrating Health Benefits into Energy-Efficiency Programs](#)
- May 4: [Multifamily-Focused Network Collaborations](#)
- May 11: [Are You Ready? Opportunities and Challenges of Home Energy Management Systems](#)
- May 18: [Innovation Station: The Latest Advances in Energy Efficiency Technology](#)

Send call topic ideas to peerexchange@rossstrategic.com

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

Program Experience: Natural Resources Defense Council

An aerial photograph of a city skyline, featuring a prominent skyscraper with a dark, reflective facade on the left. The sky is blue with scattered white clouds. The text is overlaid on the right side of the image.

Creating Resilient and Energy-Efficient Cities through Local Partnerships

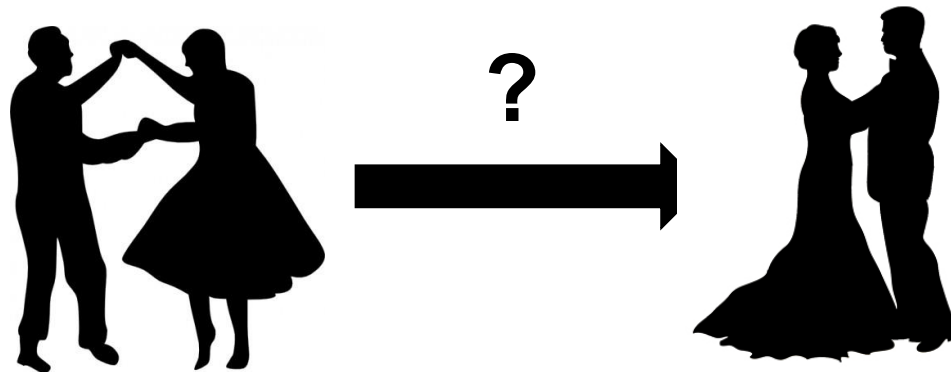
***Better Buildings: Two Is More Than One: Leveraging
Strategic Partners***

April 20, 2017

**Kimi Narita
Deputy Director, City Energy Project
Natural Resources Defense Council**

The Set Up

- Cities want to take action on climate change and reduce the energy used in buildings throughout their city and improve resilience
- Cities have limited capacity to do this work
- Local organizations want to engage with the city to build lasting relationships as well as advance their own missions
- Local organizations bring something that cities need
- Energy efficiency policies are executed in partnership



Goal, Questions, Methodology

Goal:

- To offer practical insights for local organizations interested in partnering with cities on energy efficiency initiatives

Questions:

- What are entry points for local organizations to engage successfully?
- What are common organizational practices that lead to successful partnerships with city governments?

Methodology:

- 14 interviews conducted in 2015 with local partner groups working with cities on benchmarking and transparency

Benchmarking and Transparency in Action

CHICAGO ENERGY BENCHMARKING



Address

Neighborhood

Property Type

2015

Property Information

Energy Use

Energy Performance Metrics

ENERGY STAR Score

MORE INFO



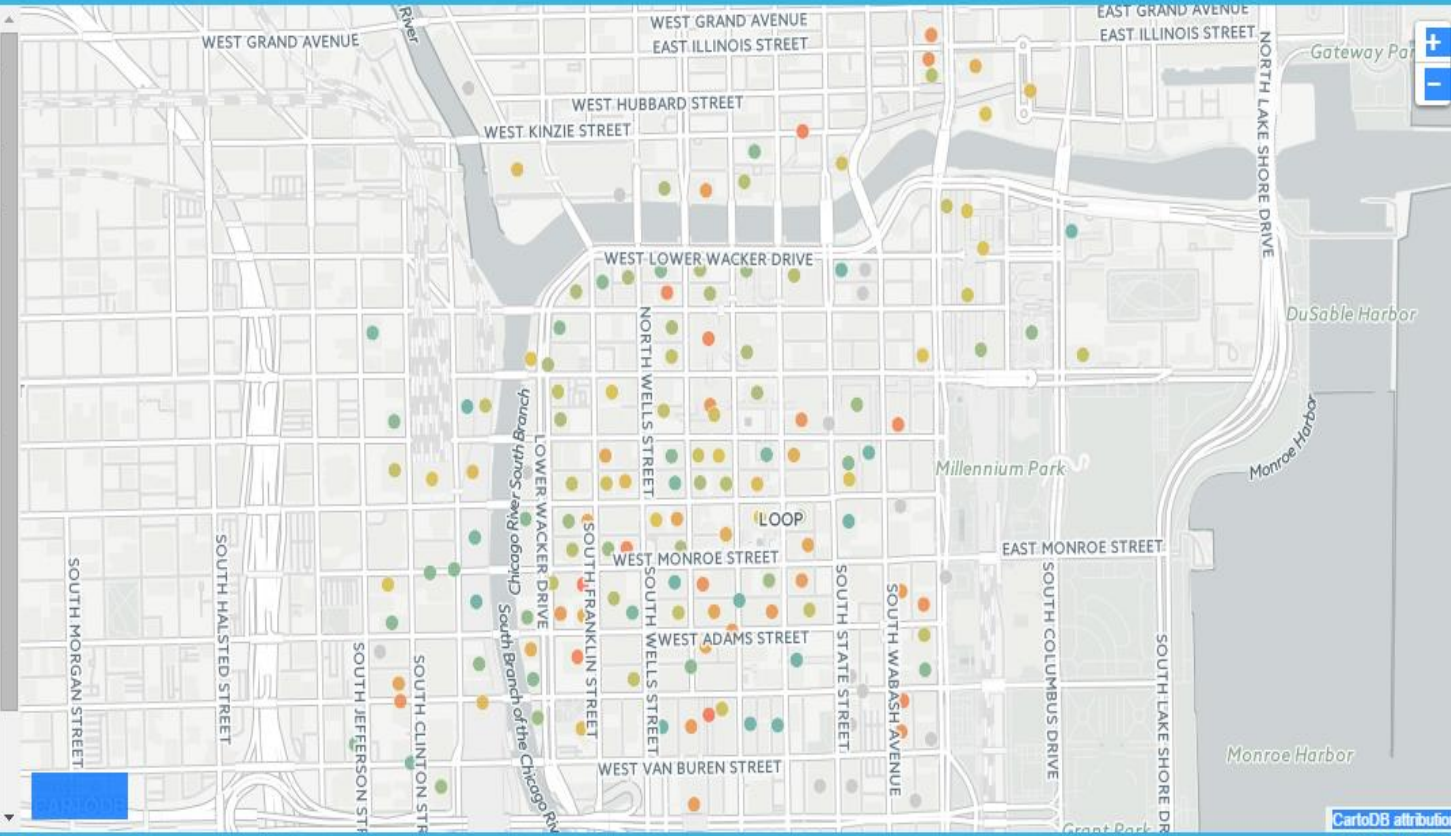
Site Energy Use Intensity

MORE INFO



Source Energy Use Intensity

MORE INFO



BUILDING COMPARISON

ENERGY STA... X

AVERAGES BASED ON RANGES SET IN FILTERS

AVERAGE
75

Best Practices by Chronology

Best Practices

- Beginning the Partnership
- Building Trust to Ensure a Successful Partnership
- Supporting a City's Energy Efficiency Initiative



Beginning the Partnership

- **Alignment of missions**, goals, and values between the City and the local organization.
 - Neither party has time for “hand holding”
 - Challenges:
 - If City has recently changed administrations
 - If the local organization did not have a pre-existing relationship with the City
 - Onus is on the local organization to do the homework on the City’s priorities, show value, be present
- Cities like to work with **known members of the community**
- If bringing a new initiative to the City, be prepared, detailed, and have the right expertise.
- If a local chapter, check with national organization

Building Trust to Ensure a Successful Partnership

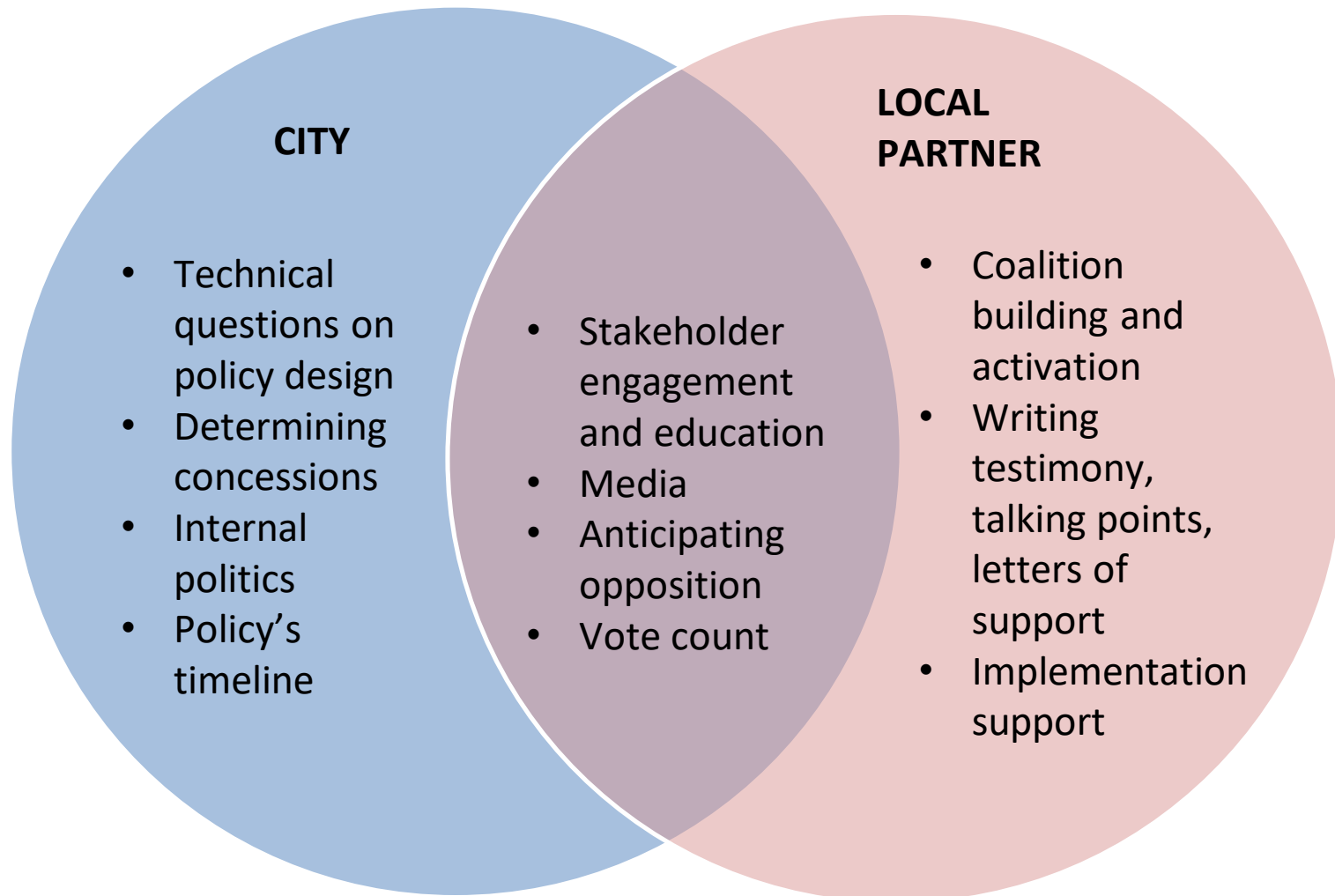
- Setting realistic expectations and following through on commitments
- Local organizations that found ways to “show value” to the City in times of need were trusted more and given more opportunities to work with the City.
- Maintaining regular communication with the City
 - Being deferential and courteous helped
 - Amplify the City’s work

Supporting a City's Energy Efficiency Initiative

- Ways to support a policy:
 - Development of the ordinance language, stakeholder engagement, outreach and education, advocacy, facilitation, and implementation of the ordinance
- Cities tended to need outside partner support at each of these stages
- Determine where to plug in
- Coordinate, especially when multiple partners are involved
- Remain flexible
 - “If you give a mouse a cookie...”



Potential Breakdown of Policy Work



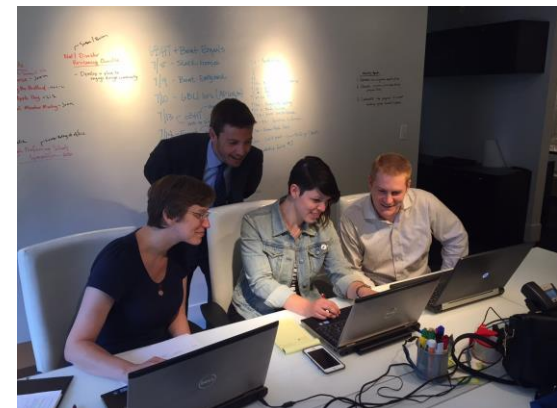
Challenges

- **Logistical**
 - Working jointly with other partners
 - Coordination is time-consuming
 - Need to have clear division of roles
- **Political**
 - City governments guarding sensitive information
 - Creates gap in communications
- **Financial**
 - Average of one to two full-time employees (FTEs) to support city benchmarking policies at any given time
 - Some local partners can absorb costs internally for a limited time
 - Most need to secure outside funding for longevity of effort

- **Policy:** Atlanta Commercial Buildings Energy Efficiency Ordinance
- **Mission:** To use market-based solutions to create green jobs, clean energy solutions, and sustainable communities
- **Beginning Partnership:** Since early 2000s
- **Unique value:** Access to real estate professionals
- **Skills:**
 - Stakeholder Engagement and Outreach
 - Convener/Facilitator
 - Implementation – running help desk; educational presentations; Portfolio Manager customer support
- **Capacity Requirements:**
 - Three interns at 75% time for help desk
 - One FTE at 65% for outreach efforts during policy passage phase

Chicago Case Study: Elevate Energy, Natural Resources Defense Council (NRDC), and U.S. Green Buildings Council-Illinois Chapter (USGBC-IL)

- **Policy:** Chicago Energy Use Benchmarking Ordinance
- **Missions:** Varied, but aligned and coordinated
- **Beginning Partnership:** Beginning of Emanuel administration
- **Unique value:** Comprehensive approach
- **Skills:**
 - Stakeholder Engagement and Outreach (USGBC-IL/Elevate Energy)
 - Advocacy (NRDC)
 - Implementation (USGBC-IL/Elevate Energy)
- **Capacity Requirements:**
 - Elevate Energy – 30% of total work
 - NRDC – 50-70% of one FTE
 - USGBC-IL – 50-60% of one FTE
 - City Energy Project - Project Manager



Conclusion

- Build trust and a proven track record
- If you do good work, the City will ask you to do more
- Without these partnerships, the work simply would not get done
- Longevity of effort still a challenge



Presentation Highlights: Natural Resources Defense Council (1 of 3)

Best practices to create and maintain local partnerships with cities:

- **Align your organization's goals** to more closely match the city's sustainability mission and objectives on energy efficiency.
- **Third partners can help open doors:** Cold emailing is rarely successful. Find local organizations that can attest to your expertise and validate your work.
- **Raise your hand:** Find ways to bring value to the city by identifying areas where the city might need help and volunteer to contribute.
- **Remain plugged in** on related energy efficiency activities in other cities: this can help you build expertise, create new partnership opportunities and boost your program's reputation.
- **Find your piece of pie:** Cities need help in different ways: from policy development to implementation and outreach. Find where you can contribute based on your area of expertise.

Presentation Highlights: Natural Resources Defense Council (2 of 3)

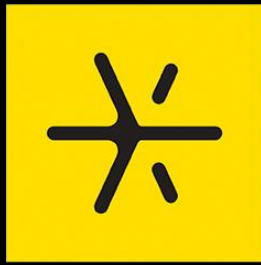
- **Be ready to put in significant resources:** Cities sometimes look for local partnerships due to limited resource capacity. Most partnerships require an intensive amount of time and energy from the partnering organizations.
- **Don't assume the city work is easy.** This false assumption has impacted the success of some partnerships. Things can happen quickly at the city level, but that's due to the direct relationship and partnerships the city has with the community.
- **Remain flexible:** Part of the partnership is maintaining that relationship. Once trust is built, cities will come back to ask for your help.

Presentation Highlights: Natural Resources Defense Council (3 of 3)

Potential challenges when establishing or maintaining partnerships with cities:

- **Too many cooks in the kitchen:** Coordination is intensive among the various actors involved in the partnership. Clear roles for each of them are essential.
 - For a city of Chicago project, the various organizations involved divided the work between themselves based on their mission and expertise. A local manager was also helpful in coordinating the entire work.
- **Communication gaps:** City officials might not share sensitive information.
- **Limited funding:** Cities are not always able to provide full funding for partnerships. Sometimes local partners can absorb the cost, but may need to secure external corporate funding.
 - City education for local organizations on funding sources could help address this barrier.
- **Changes in city administration:** Can create inconsistencies in partnerships due to changing vision and objectives.
- **Lack of pre-existing relationship with the city:** Many local organizations might not have an established relationship with the city, which makes it more challenging to establish partnerships.

Program Experience: Vermont Energy Investment Corporation (VEIC)



Vermont
Energy Investment
Corporation

Partnering with Non-Profit Organizations to Help Reduce Low-Income Energy Costs

Paul Markowitz
Program Manager

Vermont Energy Investment Corporation

EM&V

Policy and
Advocacy

R & D

PROGRAMS:
Design
Planning
Implementation
Evaluation

Where VEIC operates
sustainable energy
utilities

Vermont

**49 municipalities
in Ohio and
neighboring
States**

**District of
Columbia**



Vermont Community Energy Partnership

- Partnership between Efficiency Vermont and non-profit organizations to help low-income Vermonters reduce their energy bills
- Reach low-income individuals through non-profit organizations who are already providing essential service
- Low-income residents don't fully avail themselves of energy efficiency services due to lack of awareness, lack of access, and pride

Non-Profit Organizations as the Vehicle

- Wide range of organizations, institutions, and agencies that serve low-income individuals.
- Many non-profits have on-going and direct relationships with their constituents.
- Staff or volunteers already make home visits.
- Ideal opportunity to share information and provide assistance around energy efficiency.

Program Goals

- Achieve measurable energy savings for low-income Vermonters
- Identify additional energy efficiency opportunities for referral
- Increase awareness about energy efficiency among low-income Vermonters



Home Energy Visits – Core of the Program

Trained staff and volunteers conduct home visits that involves:

- Direct installation of energy saving products
- Identify homes that have additional energy saving opportunities and opportunities for referrals
- Raising awareness about efficiency

Direct Install Piece

Includes:

- LEDs and CFLs
- Low-flow showerheads
- Sink aerators
- Hot water pipe wrap
- Advanced power strips



Home Energy Visit Form

Home Energy Visit Form

Vermont Community Energy
Partnership Grant Program

INTRODUCTION: WHAT IS A HOME ENERGY VISIT?

Most Vermont homes have significant opportunities for saving energy. For example, a typical Vermont home can cost-effectively reduce its home heating and cooling costs by an average of 25%. Many homes can also reduce their electrical usage by installing more energy efficient products.

The purpose of this home energy visit is to:

- Help you realize real energy savings by installing energy efficient products
- Identify energy saving opportunities in your home
- Provide you with information about resources to help you move forward

This home visit is not a professional energy audit. If significant energy saving opportunities are identified as a result of this visit, you will be referred to energy professionals who can provide you with more in-depth assistance. We encourage you to participate in this visit.

INFORMATION ON PERSON(S) CONDUCTING VISIT

Date of Visit: _____ Visitor Name: _____
Organization: _____

PARTICIPANT INFORMATION

Name: _____ Phone Number: _____
Email Address: _____ ☐ Check to receive energy-saving offers and updates via email
Installation Address: _____ Town: _____ Zip Code: _____
Mailing Address (if different): _____ Town: _____ Zip Code: _____
Number of Occupants: _____ Do you rent or own this residence? ☐ Rent ☐ Own
Type of Dwelling: ☐ Single Family Home ☐ Multi-family Home (five or more units)
Electric Utility Provider: _____
Electric Utility Account Number (if available): _____

Fuel Type (Check all that apply)	Fuel Oil	Propane	Natural Gas	Kerosene	Wood Pellets	Cord Wood	Electric	Other
Home Heating								
Hot Water								

INSTALLATION INFORMATION

Compact Fluorescent Light Bulbs (CFLs)	Number Installed	Water Saving Products	Number Installed
14W TCP "A" style (60W equivalent)		Bathroom/kitchen faucet aerator (1.5 gallons/minute)	
14W TCP globe-style (60W equivalent)		Showerhead (1.5 gallons/minute)	
15W Earthmate spiral (60W equivalent)		Other Products	Number
15W Greenlight reflector (60W equivalent)		TrickleStar advanced power strip	
20W Earthmate spiral (75W equivalent)		1/2" pipe wrap (in feet)	
3-Way Earthmate spiral 12/22/33W		3/4" pipe wrap (in feet)	

Efficiency Vermont
888-921-5990 • www.efficiencyvermont.com

WALK-THROUGH ASSESSMENT

The purpose of the walk-through assessment is to visually identify possible energy saving opportunities in the home and provide information on resources to help improve both thermal and electrical efficiency.

THERMAL SAVING OPPORTUNITIES

Attic
Is there an attic hatch or pull down attic stairs? ☐ Yes ☐ No ☐ Don't know
If so, is it insulated and/or weather-stripped? ☐ Yes ☐ No ☐ Don't know

Basement
Have the box sills been well-insulated? ☐ Yes ☐ No ☐ Don't know
Is the mud sill (or sill plate) air sealed? ☐ Yes ☐ No ☐ Don't know
Is there an exterior basement door? ☐ Yes ☐ No ☐ Don't know
If so, has the exterior door leading to the bulk head door been air sealed and insulated? ☐ Yes ☐ No ☐ Don't know

Living Space
Have exterior doors been weather stripped? ☐ Yes ☐ No ☐ Don't know
Can you feel cold air leaking around the windows? ☐ Yes ☐ No ☐ Don't know

ELECTRICAL SAVING OPPORTUNITIES

Clothes Washer: Manufacturer: _____ Model #: _____
Serial #: _____ Date of manufacture of clothes washer: _____
Refrigerator/Freezers: Manufacturer: _____ Model #: _____
Serial #: _____ Date of manufacture of refrigerator/freezer: _____
Is there a second refrigerator that has the potential to be eliminated? ☐ Yes ☐ No ☐ Don't know

KITCHEN TABLE DISCUSSION

Review the "How Energy Efficient is Your Home" worksheet:
_____ BTUs/square feet

Are any of the following present?

Major drafts ☐ Yes ☐ No ☐ Don't know
Ice dams ☐ Yes ☐ No ☐ Don't know
Mold/moisture issues ☐ Yes ☐ No ☐ Don't know

Have any major energy efficiency home improvements been done in the last 10 years? ☐ Yes ☐ No ☐ Don't know

If yes, please indicate improvements: _____

This home would be a good candidate for referral for comprehensive home weatherization improvements:

☐ Yes
☐ No
☐ Don't know

I would like Efficiency Vermont to provide a copy of this completed form to a local community action agency which provides free weatherization services for income-eligible households.

Signature: _____

This visit is not a professional home energy audit and will not include weatherizing your home. A professional home energy audit includes an evaluation of the amount of air leakage in your home and the effectiveness of your insulation, heating system, lighting, appliances, and windows and results in a comprehensive scope of work for improvement.

Efficiency Vermont
888-921-5990 • www.efficiencyvermont.com



Grant Recipients

- Regional councils on aging
- Community action agencies
- Community land trusts
- Energy cooperative
- Time bank
- Homeless housing service agency

Program Metrics

- Energy savings
- # of referrals to Weatherization Assistance Program
- # of households participating in the program
- Level of awareness raised
- Participant satisfaction level with program



Results

Quantitative

- 750 home visits conducted
- 178 MWH saved
- 200 referrals to weatherization assistance or appliance replacement

Qualitative

- 97% agreed - the home energy visit will help me make better decisions to use and save energy'
- 98% very likely - to recommend a home energy visit to a friend

Cost

- \$790/MWH

Quote

“I really want you at Efficiency Vermont to know how much these energy visits mean to the majority of our elders. They live oftentimes in big rumbling farm houses alone. Knowing that money is being saved on the electricity bill allows them to keep lights on so they do not fall and yet they are not at all worried about wasting money.”

-- Karen Budde, RSVP Volunteer Coordinator
Northeast Kingdom Council on Aging

Quote

“This program was really valuable because it allowed us to extend the services we offer our low-income clients beyond fuel deliveries to include direct installs of efficiency measures and replacement of old and unsafe furnaces. We were also able to identify candidates for weatherization services and those with old, inefficient appliances.”

-- John Quinney, President
Energy Coop of Vermont

Recommendations

- Incorporate input from non-profits and low-income energy service providers into program design
- Set up effective tracking system for efficient products
- Go only with LEDs (no CFLs)
- Conduct effective training for grantees and reconvene at least once to share lessons learned

Contact Information

Vermont Energy Investment Corporation

Paul Markowitz
www.veic.org

Program Experience: Vermont Energy Investment Corporation (VEIC) (1 of 2)

- **Utilize the local organizations' network to drive demand:**
 - The Vermont Community Energy Partnership Grant Program offers grants to nonprofit organizations to increase awareness and boost energy upgrades among low-income Vermonters.
 - Funding for the program is provided through VEIC's energy efficiency utility, Efficiency Vermont.
- **Offer training:** Local organizations act as program messengers.
 - Through training, VEIC makes sure that local organizations have the skill set to not only educate homeowners, but also perform direct installations of energy products.
- **Break through the barriers to reach your audience.**
 - Pride can be an inhibitor when working with low-income residents.
- **Make it personal:** Home visits prove to be very effective due to the personal interaction with residents.

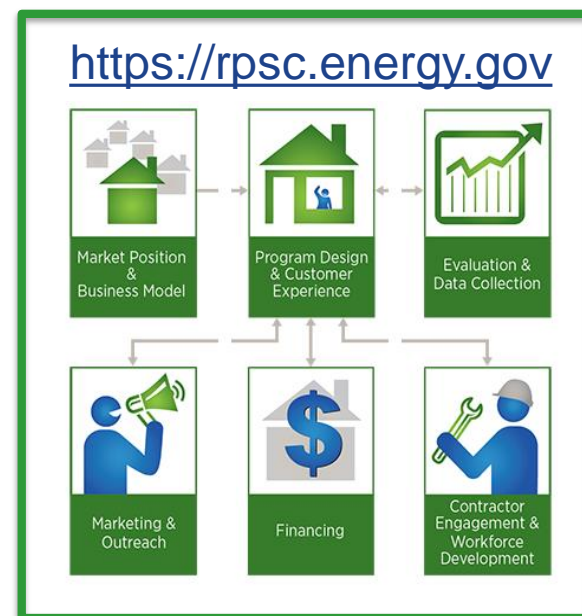
Program Experience: Vermont Energy Investment Corporation (VEIC) (2 of 2)

- **Focus on smaller measures first.**
 - The Vermont Community Energy Partnership Grant Program started with the direct installation of energy efficient products. This created the opportunity to identify and direct participants towards deeper energy-saving upgrades, including referrals to the U.S. DOE's Weatherization Assistance Program.
 - The Weatherization Assistance Program also provides funds for replacement of home appliances with high-energy use.
- **Collect feedback from participants to continuously customize the program:**
 - Handing surveys after each home visit enables VEIC to adjust and improve the program design over time.
- **To obtain project funding, consider submitting joint grant applications** when possible, to increase your chances of success.

Related Resources in the Residential Program Solution Center

Explore resources related to leveraging strategic partners:

- Read this BBRN [case study](#) on how GTECH Strategies developed and maintains strong strategic partnerships with local companies and organizations.
- Check out this BBRN [Partnerships Toolkit](#) which contains templates, tools, guides, and examples to help programs engage in partnerships that leverage resources and strengthen their programs.
- Explore the [Program Design & Customer Experience – Identify Partners](#) handbook on building relationships that can enhance knowledge, resources, capabilities, and access to customers and contractors.



- Check out the latest [Proven Practices](#) post on [Keeping the Program Simple](#).
- The Solution Center is continually updated to support residential energy efficiency programs—[member ideas are wanted](#)!

2017 Better Buildings Summit is three weeks away!



Be sure to [register today](#) for the 2017 [Better Buildings Summit!](#)



Spread the word:

[#BBSummit17](#) registration is right around the corner. Get ready to learn about expert [#EnergyEfficiency](#) enhancements <http://bit.ly/2iZCMsB>

GET SOCIAL WITH US



Stay engaged and connected with the Better Buildings Residential Network and our partners from the residential and multifamily sectors!

Follow us to plug into the latest Better Buildings news and updates!

Share with us your top stories on how your organization is accelerating energy savings through efficiency upgrades, strategies, and investment!



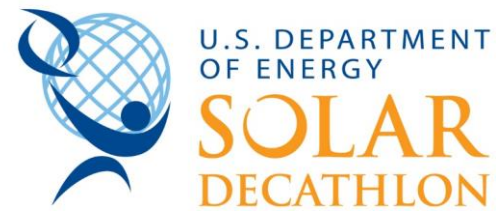
[Better Buildings Twitter](#) with [#BBResNet](#)



[Better Buildings LinkedIn](#)

We can't wait to hear from you!

U.S. Department of Energy Solar Decathlon



Oct 5-15, 2017 DENVER

- 13 Collegiate teams compete in 10 contests
 - New for 2017: Innovation and Water
- Winning team best blends technology, market potential, design excellence with smart energy solar production and maximum energy and water efficiency.
- Large free public event – showcases best of clean energy technology
- Denver location: new, mixed use smart community on transit line near Denver International Airport
- Sponsorship Opportunities
- Info: www.SolarDecathlon.Gov



Solar Decathlon 2015 Teams in Irvine, Calif.
Credit: Thomas Kelsey/U.S. Department of Energy Solar Decathlon

Addenda: Attendee Information and Poll Results

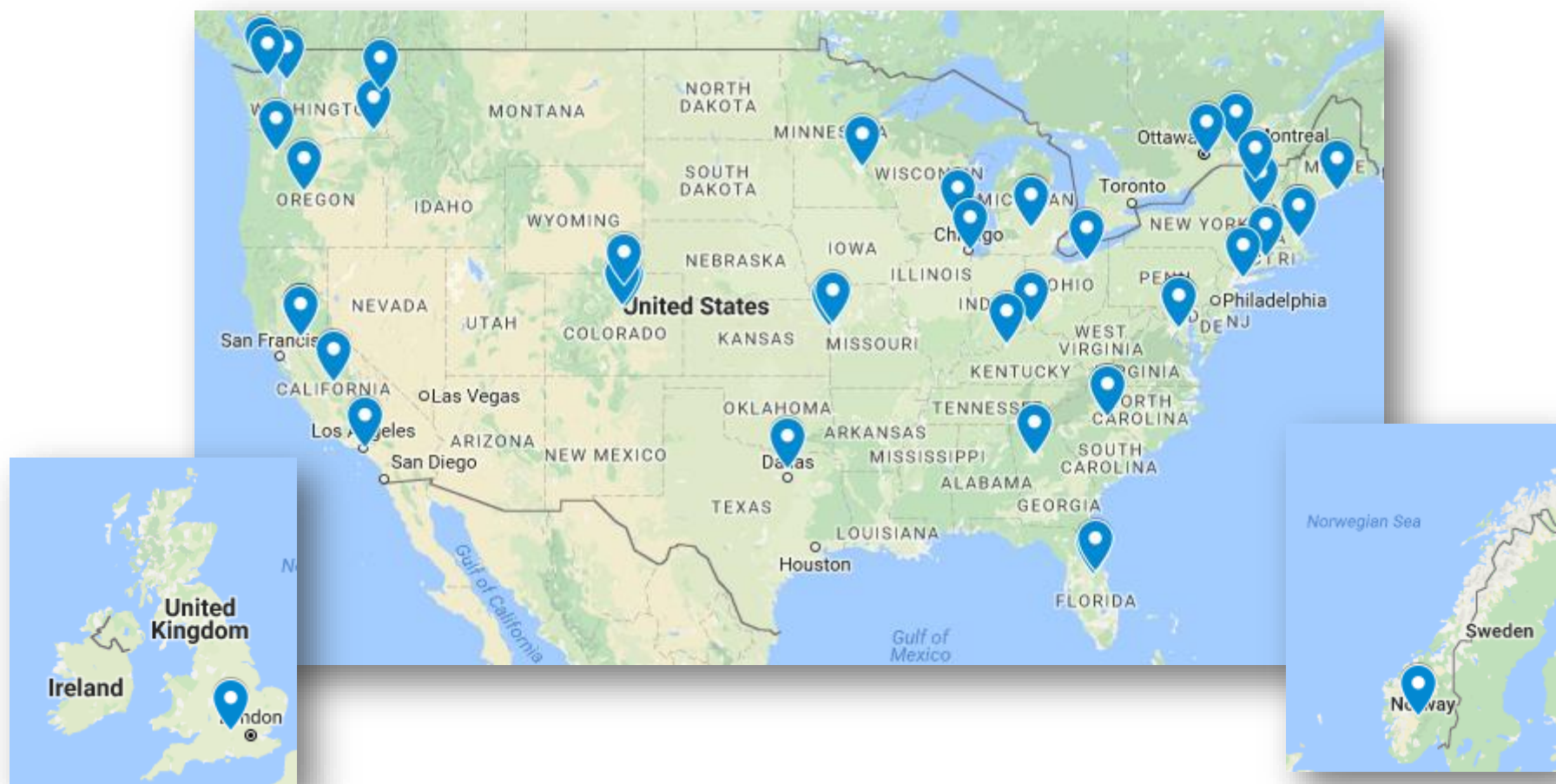
Call Attendees: Network Members

- AppleBlossom Energy Inc.
- Arlington County (VA)
- City of Kansas City (MO)
- Clearesult
- Cleveland Public Power
- Connecticut Green Bank
- Elevate Energy
- Fort Collins Utilities
- Greater Cincinnati Energy Alliance
- NeighborWorks of Western Vermont
- TRC Energy Services
- Vermont Energy Investment Corporation (VEIC)

Call Attendees: Non-Members

- Applied Research Associates. Inc.
- Armando Cobo Designer
- Ballarat Consulting
- Bonneville Power Administration
- City of Atlanta (GA)
- City of Orlando (FL)
- Clallam County (WA)
- Colorado Code Consulting
- Dimension Energétiques
- Energetics Incorporated
- EPA Region 7
- Greater Minnesota Housing Fund
- Island Institute
- Local Government Commission
- Massachusetts Department of Public Utilities
- Massachusetts Department of Energy Resources
- Mitsubishi Electric Cooling & Heating
- Natural Resources Canada
- Pura Vida High Performance Builders
- San Joaquin Valley Clean Energy (SJVCEO)
- Snohomish County (WA)
- Solar Habitats, LLC
- Sustainable South Bronx

Call Attendee Locations



Opening Poll #1

- Which of the following best describes your organization's experience with strategic partnerships?
 - Very experienced/familiar – **39%**
 - Some experience/familiarity – **36%**
 - Limited experience/familiarity – **18%**
 - Not applicable – **7%**
 - 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 – **69%**
 - Consider implementing one or more of the ideas discussed – **25%**
 - Make no changes to your current approach – **6%**
 - Other (please explain) – **0%**