

Residential Retrofits

What Works and What Doesn't?

Motivating Homeowners to Complete Home Energy Upgrades



Rocky Mountain Utility Efficiency Exchange
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Who We Are

Davis Energy Group helps developers, builders, utilities and agencies make housing more energy efficient and sustainable.

- Integrative Design Process Facilitation
- Green Building Consulting
- Building Modeling & Energy Consulting
- Net Zero Energy Houses & Communities
- Verification





Who We Are

Advanced Energy Products provides equipment for Home Energy Upgrades to contractors.

- bulk purchasing program
- one stop shopping
- contractor resource center
- discounted home performance equipment and materials (a/c, furnaces, windows, pool pumps, water heaters and more)

www.advancedenergyproducts.com



Energy Challenge

- Residential Retrofit Pilot Program
 - In coordination with Energy Upgrade California incentive program
- Promote Home Energy Upgrades (retrofits)
 - ✓ Envelope sealing
 - ✓ Duct sealing
 - ✓ For comfort
 - ✓ Insulation
 - ✓ Windows
 - ✓ Energy savings
 - ✓ HVAC
 - ✓ Water Heater
- Funded by California Energy Commission (CEC)



Energy Challenge

- Trial runs
 - Contractor Selection
 - Marketing/Outreach
 - Sales approaches
 - Standard packages
 - Bulk purchasing
 - Tracking results
- Lessons Learned
 - Program design implications



Barriers

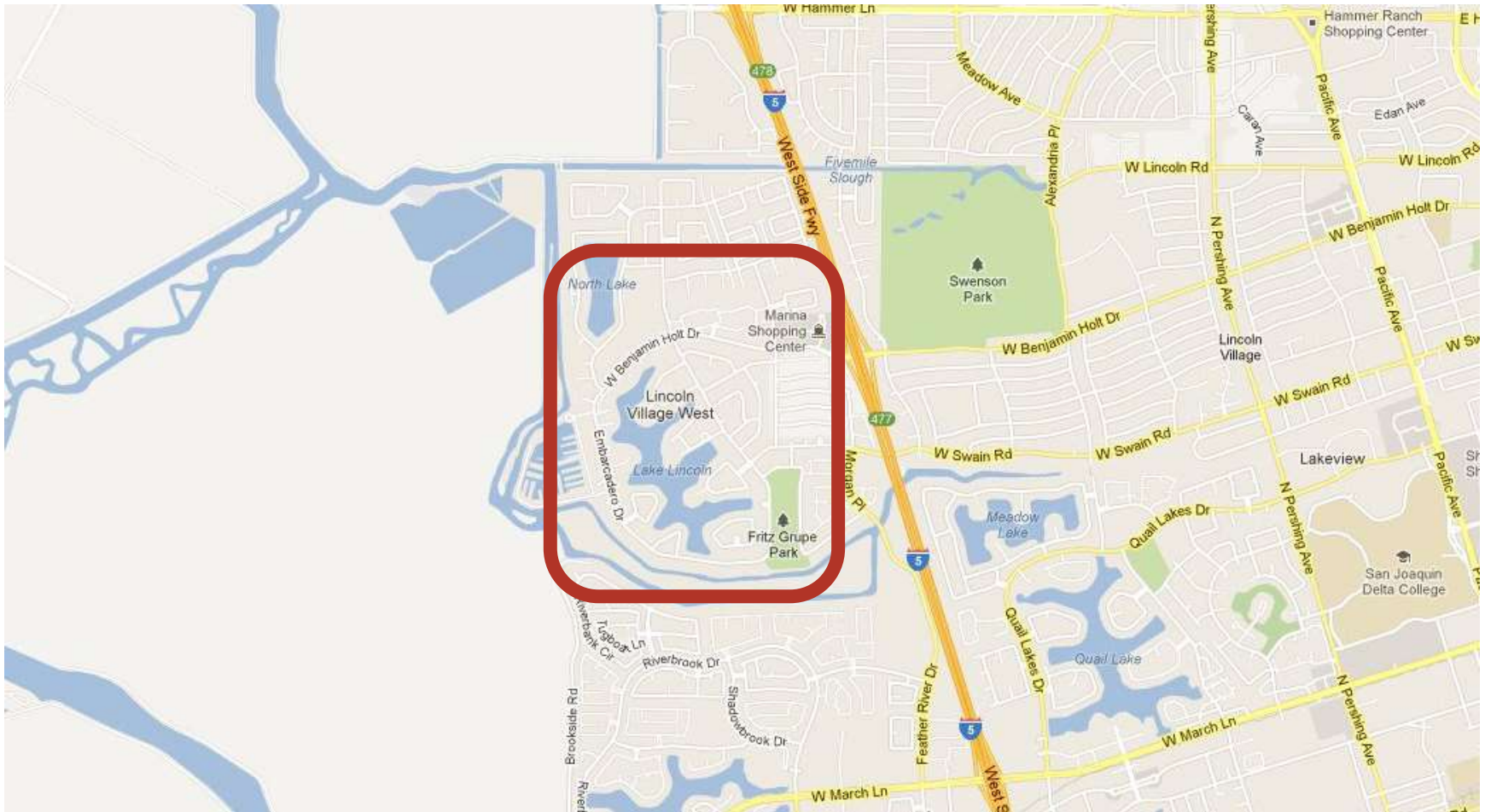
- First Cost
- Home Energy Assessments
 - Audits
 - Modeling
 - Design
- \$1,000! 10%!!



Marketing Approach

- Target Markets
 - Initially tight
- Need to broaden







Marketing Techniques

Blanket Mailing	
Radius Mailing	✓
Canvassing	
Door Hangers	✓
Newspaper Inserts	
Newspaper ads	✓
Google Ads	
Facebook Ads	✓✓
Shopping cart ads	
Bus Ads	
Movie Ads	
Event Booths	✓✓



Marketing Goal: Awareness & Receptivity

- Radius post cards
 - 3rd time's the charm
- Facebook
 - “Like” contest
 - IPAD give-away for most “Likes”
 - Ads
 - Drive people to contractor's websites
 - 2 months, \$1,500 , over 750 “Likes”

“We have seen a large increase in Energy Assessments and retrofit possibilities...we plan on continuing the efforts....”



SALES INFRASTRUCTURE

- Who's going to get the sale?
- Who says "Sign here"?



Professional Sales Person

- Trained
- Experienced
- Good Listener
- Likes people/people like them
- Can assess customer – find their “hot buttons”
- Knows how to close
- Understands financing
- Burning desire to sell
- Super (Wo)Man??



Do These People Exist?

- Yes!
- They're selling to homeowners now
 - Real Estate
 - Flooring
 - Appliances
 - Pools
 - Roofs
 - Remodels



Comparative Results

Pilot

Penetration Rate

Sales Oriented Contractors

Energy Challenge .15%

Palmdale-A .09%

Non-Sales Oriented Contractors

Sonoma .05%

Palmdale-B .01%



Standard Retrofit Packages

- L-Shaped Ranch House
 - Air seal
 - Attic insulation
 - Options
 - Water heater
 - Furnace
 - A/C
 - windows
 - Duct replacement/seal
 - Various small items



Applicability

- Lincoln Village West
 - Palmdale + Santa Rosa +++
- Audit & Modeling

VS.

- Rapid Home Energy Assessment & Design (RHEAD) Tool
 - Needs development



Bulk Purchasing

- One-Stop Shopping
- Pricing vs. Volume Conundrum
- Potential to Save Time & Money
- Relationship Based



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Tracking

- Job Tracking System (JTS)
 - Homeowner address
 - Measures
 - Contract Information
 - Energy use data
- Data Collection
 - Utility bill data
 - Challenges
- Central, secure data repository needed



Contractor Selection & Training

- Key Criteria
 - BPI certified
 - EUC participant
 - Whole house performance experience
 - Flexible
- RFQ: East Bay
 - 4 responses
 - Chose: Mason/BPP and Stewart Heating & Air
- 2 Contractors seems optimal
 - Back-up
 - Choice
 - Moderate competition
 - Optimal for program administration



Top 10 Lessons Learned

10. Do not expect a short-term program to be a self-starter in a new industry. Consistent, long term programs needed;
9. Simplify necessary paperwork and procedures for contractors and homeowners;
8. Utilize consistent, constant marketing;
7. Use contractors that are already embedded and respected in the community;
6. Streamline QA processes;



Top 10 Lessons Learned

5. Target broad communities rather than neighborhoods;
4. Identify early adopters in a community;
3. Employ professional sales staff;
2. Utility Data is very hard to obtain: A central, secure utility data repository needs to be funded and developed;
1. Keep the program administration simple!



Questions?

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