



CLEAResult

Trade Ally Collaboration

Within Residential Programs

We change the way people use energy™

Goals and Objectives

- Gain a better understanding of:
 - Overall approach of programs in motivating homeowners and contractors
 - Challenges encountered in engaging trade allies within programs
 - How we addressed these challenges
 - Lessons learned along the way



Introduction

- Populus staff manage contractor services for multiple programs including:
 - Boulder County EnergySmart
 - Denver Energy Challenge
 - Xcel Energy Home Energy Audit
 - Xcel Energy Home Performance with Energy Star
 - Platte River Power Authority Efficiency Works
- Primarily will be talking about experiences in EnergySmart and Denver Energy Challenge
- Focus on contractors (companies installing measures)



Overall Program Approach

- Homeowner Journey—Energy Advisor Role
 - People First, Buildings Second
 - Listen, Counsel, Identify, Support, Advise
 - Implementation Assistance
 - Remove Barriers
 - Facilitate communication among homeowner, auditor, contractor, financing contact, rebate processor
 - Provide unbiased, third-party advice
 - Knowledgeable on Rebates and Incentives
 - Help Clients (homeowners and community/utility funding clients) meet their energy reduction goals



Overall Program Approach cont.

- Contractor Journey
 - Similar to homeowner journey
 - Contractor Services Technical Team for contractor relationship
 - Years of experience related to building science
 - BPI and other certifications on staff
 - 8 members in group with team leads
 - Our role is to ensure contractors are motivated to use best practices while being successful at their business

Program Background Information

- Customer Participation (Populus Advised Accounts)
 - DEC=3,565 participating residences
 - ES= 12,059 participating residences
- Contractor Pool
 - 21 participating contractors
 - 11 in EnergySmart only
 - 3 in DEC only
 - 7 in both programs
 - Contractor Business Focus
 - 5 HVAC
 - 8 Air Sealing & Insulation
 - 8 Windows

▲ Program Background Information cont.

- Program Savings (includes Quick Installs)
 - Energy
 - DEC=1,568,883 kWh
 - ES= 4,581,658 kWh
 - \$ (assuming average residential rate of 11.2 cents/kWh)
 - DEC=\$175,715
 - ES=\$513,146

Contractor Challenges

- Challenge is to communicate the relevancy of programs to their business and help them understand rules and how to incorporate to the extent possible within their everyday practice
- Specific challenge items
 - CAZ testing as a best practice
 - Bid response time
 - Returning paperwork on-time and filled out correctly

Contractor Challenges cont.

- Specific challenge items
 - Getting contractors to see the CS team as an ally vs. “Big Brother”
 - Making sure contractors are fully aware of, and compliant with, all of the items in the QC checklists
 - Helping contractors understand that they can rely on the advisors for submission of forms and can help with communication with homeowners.



▲ Contractor Engagement

- Rename group to Contractor Services
 - Initially Contractor Management
 - New name indicates here to help
- Identify contractor needs and desires for the program
 - Survey (only 4 respondents)
 - Phone calls (better response)
 - Personal meetings (when possible)

▲ Contractor Engagement cont.

- Formed Trade Ally Advisory Group (TAAG)
 - Informed all contractors
 - Selected smaller group to represent
 - Held two meetings since formed in February
 - Another meeting planned in October
 - Prioritized items and begin implementing
- Items implemented from TAAG work
 - Partnering approach
 - Streamlined CAZ testing process
 - Provide targeted mentoring, training and coaching
 - Technical policy documents for common understanding

▲ Contractor Engagement cont.

- TAAG planned items
 - Monthly Contractor status report
 - Includes quantitative data
 - Review of QC rating and point system
 - Review of CAZ principles and procedures
- Mentoring and coaching
 - Changed QC approach to be tip driven
 - 1:1 meetings with contractors

Contractor Engagement cont.

- Contractor Rating System

- Started in June
- Combination of Carrot and Stick
 - Carrot



- (Planned) Gift cards for crews for contractors that receive outstanding
- Announcement in Quarterly newsletter
- Publish outstanding rating on program website
- Stick
 - Inactivate within program
 - Still provide mentoring and coaching to bring their scores up for re-admittance into program



Contractor Engagement cont.

- Contractor Rating Process

- Contractors are expected to perform work compliant with municipal building code and applicable BPI standards.
- We provide an Inspection Checklist to contractors that participate in the programs.

- Rating system

- All Contractors will begin with a score of 100 points.
- Contractors maintaining a score of 90 or above = Outstanding
- Contractors with scores between 70 and 90 = Participating
- Contractors with scores below 70 = Inactive
- Contractors can accumulate scores over 100 up to 120 points



Contractor Engagement cont.

- Contractor Rating Process
 - All contractors will maintain a running QC score with additions or subtractions:
 - 3 – 5 points are awarded for:
 - Each inspection with no corrections required
 - Every positive homeowner feedback received
 - Every audit shadow or coaching session conducted by a Contractor Services team member
 - Every CEU earned towards BPI/RESNET recertification 3
 - Every month completed where all forms are submitted on time and all responses are within the acceptable time period



Contractor Engagement cont.

- **Contractor Rating Process**
 - All contractors will maintain a running QC score with additions or subtractions—example of items scored include:
 - **Major Deduction 50 points**
 - A field inspection failure with egregious circumstances or if a serious health/safety issue is created
 - **Minor Reductions 3 – 5 points**
 - Each customer complaint related to customer service/professionalism.
 - Failure to address a homeowner complaint within one week
 - Failure to respond within one week to requests for information from an Energy Advisor or Contractor Services team member



Contractor Feedback

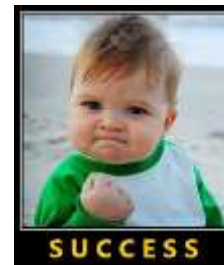


- Contractors interviewed conveyed:
 - Five of seven believe program is better since implementing changes
 - Two of seven believe program is same
 - Only members of TAAG were aware of program
 - All but one expressed program benefits their business (one not sure)
 - Customer referrals and EA's educating customers two most common mentioned benefits
- How we incorporate for improvement
 - Document what we hear primarily in Salesforce
 - Summarize and bring to our TAAG
 - Take action
 - Prioritize and implement with timeline
 - Inform contractors why we can't do it



Lessons Learned

- Importance of reinforcement
- Follow-through when issues arise
- QC Rating system
 - Successes
 - Areas for Improvement
- Understanding contractor needs
 - We identified through survey and informal and formal discussions
 - Survey in Feb (find results)
- Success of contractor portion of programs due to internal CS team effort



Q&A and Contact Information

- Q&A



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