

Energy Upgrade California BASICS Marketing and Sales Training

Reduce energy use. Save money. Create jobs.



About Energy Upgrade California

Energy Upgrade California Overview

Energy Upgrade California™ delivers the tools and resources that make it easy for property owners to improve energy and water efficiency, save money, increase home comfort and help the environment.

www.EnergyUpgradeCA.org



Unprecedented Collaboration

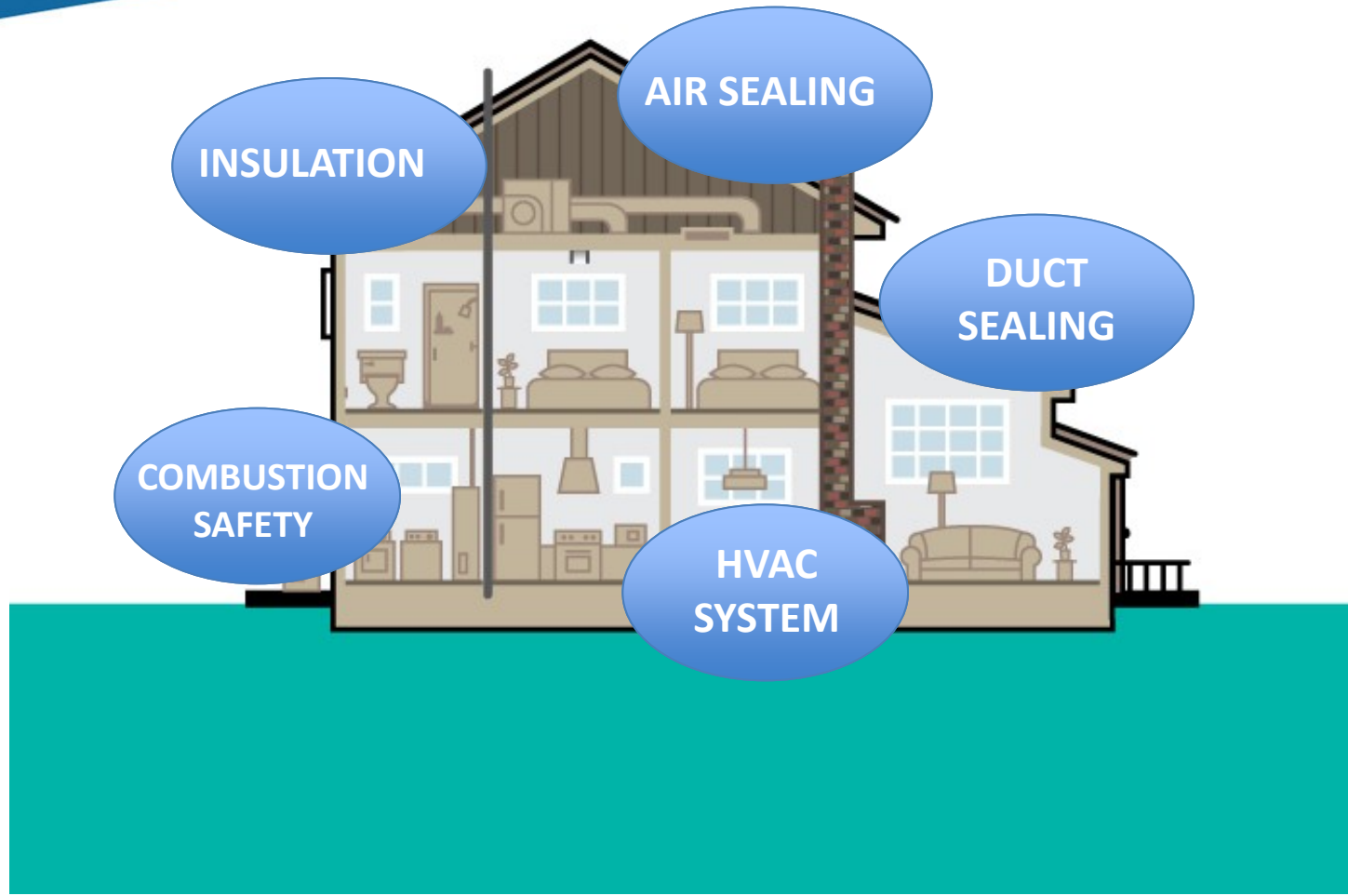
- **Partnership** between the California Energy Commission and Public Utilities Commission
- **Collaboration** with the local city and county governments, investor-owned utilities and municipally-owned utilities
- **Vision:** Create a sustained home performance industry and transform the market for energy efficient existing home retrofits



Statewide Goals

- Upgrade 100,000 homes by 2013 (~1%)
- Create 12,000 construction-related jobs
- Complete 2,000 test-in/test-outs
- Evolve thinking to Whole House approach
- Reduce greenhouse gas emissions
- Improve air quality and health

Whole House Approach



Energy Upgrade California is...

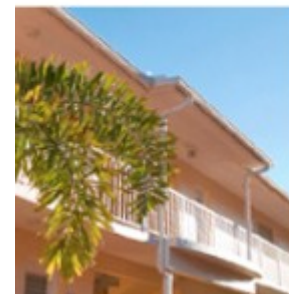
- *One-Stop Shop* for homeowners and contractors
- Consolidated information on rebates and financing available in your area
- Reliable information on home energy upgrades
- Qualified Energy Upgrade Contractor and Rater listings
- Workforce development and training opportunities for contractors and raters
- Quality Assurance on all Energy Upgrade jobs

Program Focus

BASIC UPGRADE	ADVANCED UPGRADE
\$1,000 (or more depending on county)	Up to \$4,000 (or more depending on county)
10% Energy Savings	15-40% Energy Savings
Required elements: <ul style="list-style-type: none">• Air Sealing• Attic Insulation• Duct Sealing• Hot Water Pipe Insulation• Thermostatic Shut-Off Valve• Combustion Safety Testing	Required elements: <ul style="list-style-type: none">• Energy Assessment from BPI Certified Participating Contractor• All measures in Basic Package• Combination of custom elements to achieve baseline Energy Savings• Combustion Safety Testing

Program Benefit Summary

- Make your home more comfortable
- Potentially lower your utility bills
- Improve home efficiency
- Receive rebates and incentives
- Take a Whole House approach
- Help the environment
- Boost your local economy



Property Owner Eligibility for Upgrade Rebates

- Participating Utilities include PG&E, SCE, SoCal Gas, SDG&E and SMUD
- Local Government vary from County to County
- Utility Company gas or electric customer (no propane)
- Single-family detached residences
 - Existing homes (not new construction)
 - Property owners do not need to reside in home

Participating Contractors

- Have attended Energy Upgrade California Participation Workshop
- Valid CA contractors license, bonding, applicable regional insurance
- Are qualified to submit documentation to IOUs for reporting
- Certified by Building Performance Institute (BPI); minimum Building Analyst on staff



Utility Rebate Scope

Whole House Rebates Do Not Cover...

- New homes
- Commercial and Multi-Family properties
- Single measures such as HVAC and windows and water efficiency
- Solar
- Load control

What is our Call to Action?

GO TO THE WEBSITE!



1 Visit the website to plan your upgrade



2 Find a contractor



3 Complete your project



4 Get your rebate!

www.EnergyUpgradeCA.org

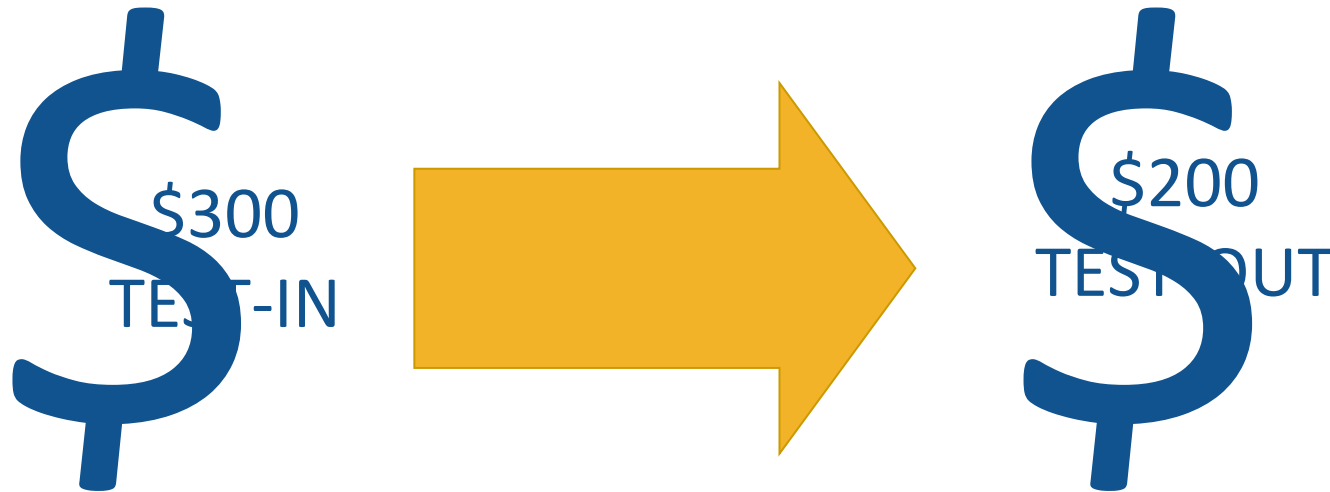
Goals for Contractors and Raters

- Develop a sustained market for Home Energy Ratings
- Provide training opportunities
- Encourage partnerships among Independent Whole-House Raters and Participating Contractors
- Support efforts to promote Home Energy Ratings and build demand for energy upgrades

Home Energy Rating Rebates

Statewide HERS Rebate

Up to \$500 available for
Whole-House Home Energy Rating



Eligibility

Owner Requirements

- Single-family residences
- Multifamily in pilot areas
- No commercial

Rater Requirements

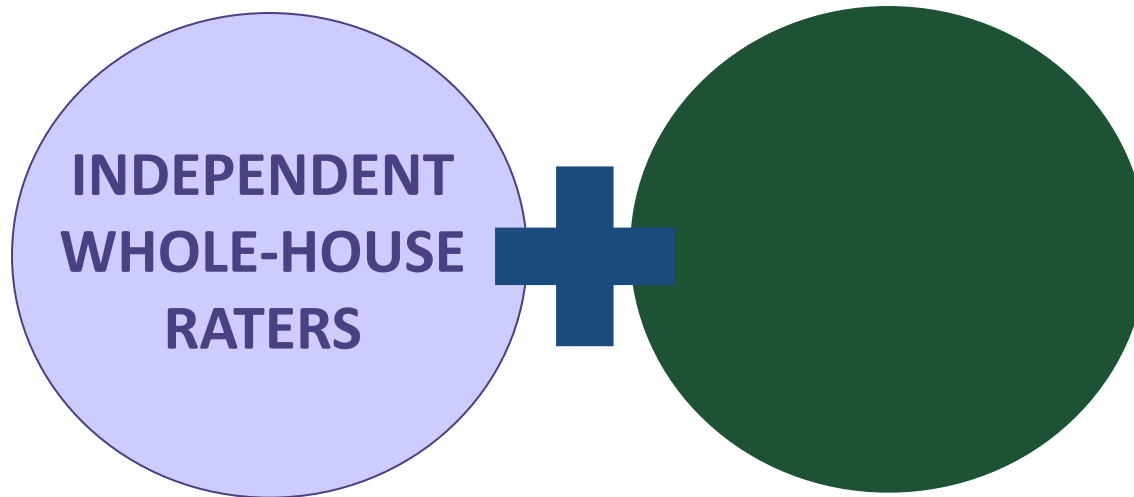
- Whole-House Independent Rater or HERS BPC

Rebate

	WHOLE-HOUSE HOME ENERGY RATING INCENTIVE	LOCAL CITY AND COUNTY REBATES	UTILITY WHOLE-HOUSE INCENTIVES	ENERGY EFFICIENCY LOANS (CHF & EEM)
Independent Whole-House Rater	√	Rating only rebates, unless working with participating contractor	If working with a participating contractor	√
(HERS BPC) Participating Contractor	√	√	√	
(Non-HERS BPC) Participating Contractor	If working with Independent Rater	√	√	

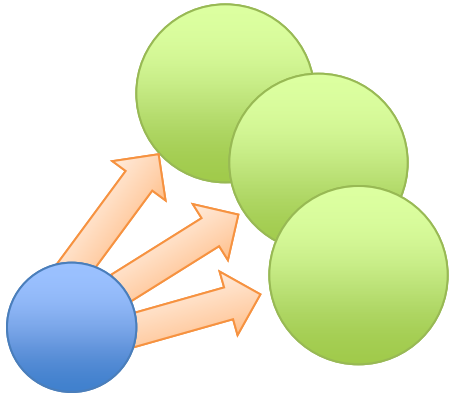
Rater-Contractor Partnerships

Raters and Contractors



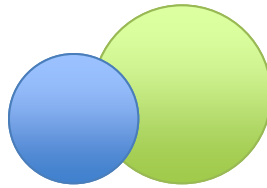
- Fostering relationships that benefit consumers
- Understanding the need for Independent Raters
- Increasing outreach and networking

Independent Rater Option



- Stand Alone Services
- Energy Rating
- Rater can provide data to multiple contractors
- Energy Assessment (minus CAS)
- Energy Rating
- Loan Qualification
- Code Compliance

Additional Service Option



- Contractor recommends rating for Loan Qualification and/or Code Compliance

Partnership Option



- Contractor and Rater Work Together
- BPI certified
- Lead Generation
- All Services Provided

Building Performance Contractor Option



- Contractor is or has BPC Certified Rater on Staff
- All Services Provided

Market Research

Reduce energy use. Save money. Create jobs.



Market Research 2010-2011

- Phone Surveys
- Focus Groups
- Contractor/Rater Interviews
- Best Practices

Market Research Findings

- Utility bill savings
- Home comfort
- Health
- Environment

The Energy Assessment

Whether completed as part of an Energy Rating or an Advanced Upgrade, homeowners perceive the value of an energy assessment as a decision-making tool to help them on their path toward greater efficiency.

Two Homeowner Types

Type 1: The Skeptic

- Wants to make their own decisions
- Doesn't want to be upsold
- Feels they know what they need already

Type 2: The Overwhelmed

- Doesn't want to make a lot of decisions
- Wants a one-stop-shop solution
- Uncertain what they need

Talking About the Program

Talking Points

Energy Upgrade California is all about helping homeowners:

- Save money through rebates
- Increase home comfort
- Save energy and protect the environment

Talking Points

My role is to help you figure out what energy improvements your home needs, how much energy you can save, and how big a rebate you could get.

Saving Money: Talking Points

- Energy Upgrade California can help you **save up to \$4,000** on home improvements.
- The more energy you save, the bigger **rebate** you qualify for.
- The first step is for us to take a look at your home together and figure out the most important and **cost-effective** energy upgrades you can make—and which fixes to do first so you can **get the most bang for your buck**.

Saving Money: Talking Points

You'd be amazed how much energy you can save!

For example... One family we worked with was living in an older home. An energy test showed that **50%** of the heated air flowing through their air ducts was leaking out.

Essentially, **they were losing 50 cents on every dollar** they spend on their home heating bills!

Increasing Home Comfort: Talking Points

What got them more excited was learning that an energy upgrade would also make their home more comfortable.

Because their attic didn't have a scrap of insulation, it got so hot **they couldn't even sleep in their upstairs bedrooms in the summer.**

So we recommended...

Increasing Home Comfort: Talking Points

- Most homes **leak energy**.
 - ✓ Too hot in the summer
 - ✓ Too drafty in the winter
- These **easy fixes** can really make a big difference in making your home more comfortable:
 - ✓ Add attic insulation
 - ✓ Seal leaky windows and doors
 - ✓ Reseal air ducts



Save Energy & Protect the Environment: Talking Points

An energy upgrade can reduce a home's energy use by as much as **40%**.

Remember the family whose home was leaking 50% of its heat on cold days?



Save Energy & Protect the Environment: Talking Points

Sealing up air leaks not only made their home more comfortable to live in —

They were also proud to teach their kids how they made their home more **environmentally friendly** by saving energy.



Talking Points

Ask questions, listen, find out what the owner needs, and offer solutions to help them achieve it.

Small Group Session

Small Group

Meet in your groups to discuss the scenarios and plan a response for each.