

Green Shares (Add bus photo from dropbox folder and Carly's photo from ductless heat pump workshop)

Goals

The goal of the Green Shares project is to increase energy efficiency in Corvallis via interaction with contractors. Prompting particular behaviors at the point of action is one effective means of increasing desired behaviors.¹ Contractors have a unique opportunity to encourage installation of maximally efficient equipment at the point of sale. At launch, our strategy was to achieve a culture shift amongst contractors whereby promoting efficiency would become the norm. We aimed to increase the number of contractors focused on energy efficiency and improve the ability of all such contractors to sell energy efficiency measures. By the end of the project, we primarily focused on the latter component of the strategy – increasing energy efficiency sales amongst the self-selected contractors who were interested in seizing the opportunity. TRIG worked towards these goals through a combination of educational opportunities for contractors, connection with leads, resources to support sales, and co-op marketing opportunities.

Outputs and Outcomes

Outputs included:

- 138 individuals attending trainings
- 18,000+ households reached (3000 from rental workshop, an unknown number by contractors, 15,000-21,000 from ductless heat pump campaign with some of those households outside City limits and some duplication likely between the 15,000 receiving mailers and the 6,000 whose homes were canvassed).
- 26 businesses enrolled with 336 Full Time Equivalent employees.
- Cost saving worksheets developed for contractors to share with customers.
- Market research on likely energy efficiency customers.
- King size, exterior bus ad promoting Green Shares and interested Green Shares contractors.

Outcomes included:

- XXX rental properties upgrades with XXXX measures and more measures planned
- XXXX ductless heat pumps installed as a result of our Going Ductless! campaign
- An estimated annual XXX kWh saved.
- Increases in building a greener energy infrastructure in Corvallis, including creating new work for energy conservation businesses.
- Increased usage of energy saving programs within the Corvallis community.
- XXX lbs CO₂ avoided over grant period with ongoing reductions expected.

Audience

The ultimate audience of Green Shares is residents of Corvallis, but the intermediary target audience is building contractors – a notoriously difficult sector with whom to connect. The project initially focused solely on contractors, but this proved to be challenging, as we were only reaching a subset of contractors: those already pitching energy efficiency to their customers. Eventually, we began reaching out directly to potential customers to help connect them with those already engaged contractors.

Comment [SM1]: Some of the things we listed as outputs in our proposal are really outcomes, so this doesn't match our proposal. Feel free to rearrange.

¹ McKenzie-Mohr, D. and W. Smith. 1999. *Fostering Sustainable Behavior: Community-Based Social Marketing Gabriola Island* (Canada): New Society Publishers.

Value Proposition

We provided educational workshops and resources that would support contractors working in the Corvallis area in selling energy efficiency throughout the project. However, as Energize Corvallis became a more recognized brand with increased capacity for communication with Corvallis residents, we captured the benefit we could add by connecting participating contractors with potential customers. As such, in the final half of the project, we added opportunities for co-op marketing and for direct engagement with leads through a focus on rental housing and on ductless heat pumps. In fact, this lead generation became our primary focus by project end.

Channels

We launched the project by reaching out to contractors and those connected with contractors to tell them about the project and to build relationships that would provide communication channels throughout implementation. Those parties included the Energy Trust of Oregon, the local Home Builders Association, the Oregon State Association of Plumbing Heating Cooling Contractors, the City of Corvallis, Community Services Consortium, the Corvallis Sustainable Building Network, Corvallis City Council, Corvallis Independent Business Alliance, and the Corvallis Sustainability Coalition and others. Simultaneously, we formed an advisory committee that could provide input on the project throughout and assist with promotion.

With these relationships, we publicized our programmatic events and opportunities broadly to all contractors working in the Corvallis area by email, calendar postings, and on our website. In addition, we sent a regular newsletter to Green Shares participants and reached out with personal emails and phone calls to participants around special opportunities and workshops. Although time consuming, we found calls to be significantly more effective than emails in garnering participation. We set up a Twitter account and Energize Corvallis Facebook page, but did not use those channels as none of our “followers” were amongst our target audience.

Activities

Because this was a brand new project, the first year was spent developing the project itself, fostering networks, creating a means for contractors to enroll, and holding our first contractor workshops. In the second year, we continued trainings for contractors, conducted informal market research on likely customers in Corvallis, provided co-op marketing opportunities, and developed resources for contractors to share with customers. In the third year, we worked towards connecting contractors with warm leads for installation of efficiency measures while continuing our other offerings. Specifically, we focused on two initiatives: tapping into the rental market and increasing sales of ductless heat pumps. Details follow.

Project Development and Ongoing Planning

The program structure grew out of conversations with more than 50 people in relevant sectors; from talking with Corvallis residents interested in implementing energy efficiency measures in their homes; and from the sparse documentation of similar programs. Formal annual check-ins with participating contractors and the advisory committee shaped the project over time.

Enrolling Contractors

To enroll in Green Shares, contractors needed to be licensed, bonded and insured and needed to commit to providing their customers with bids and information about energy efficient options. Contractors enrolled online by filling out a survey describing their business and what trainings, etc. would be most useful to them. When directly promoting Green Shares contractors, we provided disclaimers to potential customers. While our trainings were available to all contractors, enrolled contractors received the following benefits.

- *Free direct advertising* to participants of other Energize Corvallis programs.
- *Free marketing* through traditional and social media outlets.
- *Informal market research* on residents' energy efficiency interests and purchasing criteria
- *Free training opportunities*
- *Materials to share with customers* such as return on investment calculations for efficiency upgrades.
- *Use of the Green Shares logo* for their promotional materials.

Marketing and Lead Generation

Our most effective effort in terms of efficiency measures installed was likely our ductless heat pump campaign, followed by our outreach to rental property owners and managers. We also engaged in more traditional marketing activities like listing Green Shares participants on our website and offering space on an Energize Corvallis bus ad. We drove traffic to the contractor list on the website primarily via direct links from the Communities Take Charge project.

We focused on the rental market because it makes up more than half of Corvallis housing and is a challenging market for efficiency upgrades. TRIG held a workshop for property managers and property owners where we presented benefits of efficiency upgrades and available financial incentives. Self-selected, participating Green Shares contractors provided a special offer and were present at the workshop, allowing property managers and owners to meet those contractors in a lower pressure situation than when receiving a bid. Several participants participated in utility programs offering direct installation of instant savings measures like light bulbs and low-flow showerheads as a result of the workshop. In addition, one of the largest property managers in the area decided to upgrade bath fans for more efficient and effective fans (which is important for mold, and therefore health) as they come up for replacement in approximately 800 units. When we follow-up with participants several months after the workshop, many told us that they had not yet made any efficiency upgrades but plan to do so in the future and found the workshop useful.

Our subsequent lead generation effort focused on increasing sales of ductless heat pumps. Again, we applied community outreach and education strategies combined with a limited time offer to dramatically increase installations. In this case, we brought together the stakeholders NW Ductless Project (Project) of the Northwest Energy Efficiency Alliance, the local consumer owned utility and the Energy Trust of Oregon, which provides energy efficiency services for Oregon's investor owned utilities. Together, we planned the "Going Ductless!" campaign whereby broad community outreach was paired with a limited time installer/manufacture's rebate. This offer was paired with a general outreach campaign promoting ductless heat pumps and was publicized by mailers to 15,000 households, distribution of hundreds of flyers at events and of 6,000 door hangs, as well as through outreach via local email list serves, newsletters, social media and a community workshop. We mobilized the many volunteers engaged in various Energize Corvallis projects to promote the campaign and garner participation. The Project and

the participating contractor paid for the mailers and doorhangs. The outcome was the installation of XXXX ductless heat pumps for deemed annual savings of XXX kWh and XXX CO₂ reduced.

Contractor Trainings

Workshops for contractors focused on annual changes to incentives at the utility and government level; marketing; and specific technologies. The intention behind the incentives workshop was to equip participants with knowledge of what programs exist for their customers and how to access those programs and share the information. The marketing workshop was very well received and focused on array of marketing techniques for general marketing and targeting energy conscious residents. The technologies covered in workshops were ductless heat pumps and heat pump water heaters – two key technologies for energy efficiency in the Pacific Northwest that are not yet widely installed. The workshops attracted 15-35 participants each, many of whom were Green Shares contractors.

Annual Timeline

The majority of our activities in which we interacted with contractors occurred in November to June, so as to avoid the busy summer construction season. Our annual strategic planning and preparatory work took place in July-November.

Lessons Learned

Overall, it was difficult to gain high levels of enrollment in the program, perhaps because of existing programs like Energy Trust of Oregon's Trade Ally program, participation in which is required in order to provide their incentives for some measures. However, even with contractors enrolled in the program, we were able to publicize our workshops broadly beyond that group, while offering specialized opportunities to that more select group of participating contractors.

The shift in program structure over time was based primarily on interactions with participating and non-participating contractors, from talking with Corvallis residents interested in implementing energy efficiency measures in their homes, and from the success of an unrelated TRIG program, "[Solarize Eugene](#)." TRIG found that many contractors do not see the value of efficiency equipment themselves and are concerned about losing sales if they are seen as pushing options on customers that are more expensive in the short run. This group would not be interested in training on how to sell efficiency to their customers, because they would not even spend the money to make their own homes more efficient. As such, we decided not to focus our efforts on these contractors and rather to increase interested contractors' ability to make efficiency sales via offering trainings for the contractors, co-marketing, market research, and sales materials and by connecting contractors with warm efficiency leads.

The keys to the success of Solarize Eugene that we applied to our lead generation efforts were:

1. Provide a limited time offer;
2. Hold workshops (or events) where potential customers can learn in a group, thereby clarifying what can be a complicated process and creating a social norm for participants, and reducing customer acquisition time for contractors;
3. Conduct a large outreach effort around the program; and
4. Simplify the process by reducing the need to collect multiple bids and providing education around incentives, technologies, and other details.

Additional lessons learned were:

- Phone calls were the most effective means of attracting participation to workshops.
- Workshops on heating and cooling should be timed to avoid the heating/cooling season, rather than to coincide with the general construction season.

Resources and Materials

Resources developed exclusively for Green Shares contractors including Return on Investment handouts and our report on Corvallis homeowner preferences, “What’s Driving the Energy Efficiency Home Upgrade?” are available here: <http://energizecorvallis.org/green-shares/green-shares-contractors/resources/>.

Other workshops materials can be seen at <http://energizecorvallis.org/green-shares/green-shares-contractors/greenshares-workshop/>

TRIG created a regular newsletter for the program with quarterly installments providing updates on Green Shares programming and highlights of other local training opportunities and relevant information for contractors. A sample newsletter can be viewed here: [http://us2.campaign-archive2.com/?u=c80bd9d09b4964914e22f1792&id=7fa469156d&e=\[UNIQID\]](http://us2.campaign-archive2.com/?u=c80bd9d09b4964914e22f1792&id=7fa469156d&e=[UNIQID])

Budget

The annual budget for TRIG’s participation in Energize Corvallis was approximately \$35,000 per year (more in the first year for planning). Most of the costs were for a .25 FTE project manager, interns and supervision from the TRIG Director. Some of the funds were dedicated to travel, food and materials for workshops, while a portion of staff time and funding also was used for project evaluation, development of materials such as this replication guide, and coordination with other components of Energize Corvallis.

Comment [SM2]: Do we want to try to distill the actual amount for program implementation? FTE is probably the most helpful.