Applying a Political Campaign Model to Energy Efficiency Outreach

Patrick MacRoy, CNT Energy, Chicago, IL

ABSTRACT

Energy Impact Illinois (EI2) is a regional effort at market transformation funded by the USDOE's Better Buildings Neighborhood Program with ARRA dollars. After a well-executed multi-modal media campaign aimed at driving traffic to a program website resulted in little participation from homeowners, we applied community organizing lessons from political campaigns to more deeply engage homeowners. After a 12 week proof-of-concept pilot, we launched an aggressive outreach campaign, assigning 20 paid field organizers geographic turfs throughout the metropolitan Chicago area to promote participation in joint utility/EI2 efficiency programs. We focused on a "hard-touch" approach that resulted in deep engagement with specific homeowners over pamphleting, tabling, or other techniques that hit a high volume with minimal engagement. In addition to presenting at community groups and other organizations to build interest, the primary tactic was recruiting hosts for an "impact party." Akin to the old-fashioned "Tupperware Party," a homeowner host would be provided a free energy assessment (audit) in exchange for inviting 5-10 other homeowners to learn about efficiency and our program in his or her home. Along with leveraging the host's social network and status as a trusted messenger, this forum allowed us to highlight areas for energy efficiency gains in the home using visualization tools including IR cameras. After over 650 parties and over a 1000 community meetings, the effort signed up over 6,000 homeowners for an assessment, and helped drive the program to completing nearly 3,600 single-family retrofits in just over a year.

Introduction and Background

In 2009, what would later become known as the U.S. Department of Energy's Better Building Neighborhood Program[1] (BBNP), invited jurisdictions nationally to compete for funding to drastically increase the number of energy efficiency retrofits across a variety of building types. With stimulus dollars from the American Recovery and Reinvestment Act (ARRA), BBNP encouraged grantees to develop solutions to identified barriers and utilize the funding to jumpstart the market and ultimately leverage private investment from the federal dollars. Grantees were offered wide latitude to try different approaches to reaching these goals and apply lessons learned from both their own efforts and national best practices to create results in their jurisdictions.

Building upon extensive local research in the energy usage of the local building stock which identified disproportionately high energy users (CNT Energy 2009) by sector, and the development of several plans to target building owners for efficiency upgrades and create regional energy plans (Chicago Metropolitan Agency for Planning 2010; City of Chicago 2008), the Chicago Metropolitan Agency for Planning (CMAP) submitted a proposal to BBNP. CMAP's proposal called for a substantial investment in overcoming the barrier of access to information. Recognizing that energy efficiency measures are, broadly speaking, economically rational in that the savings will exceed costs over time, the application noted that a lack of awareness and a lack of information on how obtain energy efficiency services was a substantial barrier.

The BBNP awarded CMAP $25 million in May 2010 to implement its proposal in the Chicago Metropolitan area[2]. CMAP decided to partition the proposal into several competitive requests for

[1] U.S. Department of Energy adopted this name in July 2011 after a few previous iterations.

[2] CMAP serves as the official regional planning organization for the counties of Cook, DuPage, Kane, Kendall, Lake,

proposals (RFPs). The first RFP for overall project implementation support, coordination, single point of customer contact, and federal reporting and compliance support, was awarded to CNT Energy in November 2010. Concurrently, CMAP issued an RFP for a communications and marketing strategy, awarded in December 2010 to a coalition headed by FleishmanHillard, Inc., a communications firm specializing in public relations and integrated marketing. CMAP had planned on issuing an additional RFP for community-based outreach later in the grant period, although this was eventually cancelled and rolled into FleishmanHillard's scope of work.

Mass Market Communications

FleishmanHillard implemented a communications and marketing strategy that relied on market research, development of a brand identify, focus group testing of marketing messages, development and production of a campaign, and dissemination of the campaign through mass media channels. The market research produced an in-depth look at homeowner attitudes toward and interest in energy efficiency in the Chicago region. It found that homeowners, especially those who were progressive or cost conscious were generally positive about energy efficiency and reducing energy use, but were unlikely to take action outside of planned repairs or replacements (Booz & Co 2011). Based on the findings, FleishmanHillard created the program brand of "Energy Impact Illinois" and developed several campaigns for engaging homeowners around energy efficiency, which were tested amongst focus groups.

The most effective campaign was based on the premise of two characters: Big Bill and Little Bill. These two were known as the "Energy Bills" who would use humor to help show that homeowners had a choice in the size of their utility bills. By avoiding the antics of Big Bill and following the sensible energy efficiency advice of Little Bill, homeowners could help themselves to a little energy bill[3]. The primary call to action in the campaign was to visit the program's website to learn how to make one's home more energy efficient. The resulting campaign was positively received, dubbed "…the most fun thing about energy efficiency you've ever seen, or at least the most least unfun," by environmental news source Grist.org (Laskow 2011), and ultimately won several industry awards[4].

The author with the Energy Bills (in cardboard form)

The mass media push using this campaign was launched in November 2011, with investments in print, outdoor, radio, TV, and online ads. The resulting ads, based on frequency of runs, were estimated to be seen by 80 percent of the target market[5] an average of eight times, and more than 65,000 unique visits were made to the program website (FleishmanHillard 2012). However, comparison of a pre and post campaign survey showed almost no change in homeowner recognition of Energy Impact Illinois or the Energy Bills campaign (Ibid).

The most important metric for the program, however, was the BBNP-mandated measure of homeowners making improvements to their homes that

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McHenry, and Will in northeastern Illinois. Additionally, the City of Rockford, located in Winnebago County in the north central part of the state, joined CMAP on the application for BBNP. Therefore the jurisdiction served by project included the CMAP counties and the City of Rockford.

[3] Some of the antics of Big Bill can be still be found at http://www.youtube.com/theenergybills

[4] Including the 2012 Gold Stevie for Consumer Advertising Campaign of the Year from American Business Awards; 2012 Gold Tower Award from the Business Marketing Association – Chicago; a Davey Award for "Integrated Campaign-Green/Eco-friendly" from the International Academy of the Visual Arts; and a TELLY in the "Local TV & Local Cable – Campaign – Not-for-profit" category.

[5] For this purpose defined as homeowners earning at least $50,000 a year in the Chicago market

achieved at least an estimated 15 percent reduction in energy usage, as well as homeowners utilizing a financing product created with the support of the Energy Impact Illinois (EI2) program. By this metric, the effort was a dismal failure. Despite the large number of homeowners visiting the webpage, very few were moving to the next step of contacting a contractor[6], and even fewer moved forward to action. In the last quarter of 2011, the program reported two completed single family projects to BBNP with a single loan, and in the first quarter of 2012 only three more projects were completed, with no loans.

Piloting a New Approach

In retrospect, the fact that mass media techniques generated some interest from homeowners, but were not sufficient to motivate them to action, is unsurprising. Lawrence Berkley National Laboratory's review of successful single family home energy programs noted the difficulty of convincing homeowners to make energy efficiency upgrades and the importance of using trusted messengers, working with contractors to deliver the information, and providing multiple, deep touches to homeowners in order to get their interest (Fuller et al. 2010). It was clear that in order for the EI2 program to successfully engage homeowners, a new direction would require a greater ground presence in which staff worked directly with homeowners. Several team members on the program noted the success of using field operatives in political campaigns to engage voters, and even to recruit volunteers to help spread the message. We therefore started exploring the opportunities to replicate the field aspects of a political campaign to engage homeowners around energy efficiency.

In March of 2012, CNT Energy contracted with Anna Markowski, a veteran of several political and issue advocacy campaigns, to help explore opportunities to apply these lessons to EI2. Markowski immediately went to work making connections with elected officials and community leaders in several communities whose demographics were believed to be well suited for a large number of single family efficiency upgrades. These leaders could then serve as trusted messengers to engage early adopters and provide connections to begin to move deeper into the communities and identify potentially interested homeowners. In engaging leaders, Markowski helped establish legitimacy by focusing on the fact that the program was funded by BBNP, managed by a quasi-governmental entity (CMAP), and implemented by a nonprofit organization. The response was largely positive, and soon Markowski was being invited to speak at efficiency-related meetings hosted by local governments and community groups.

There remained however a large gap between interest and the belief amongst homeowners that there was significant value to warrant investment in an energy audit, which is often priced at $500 or more. Some of the most sensible energy efficiency measures, such as air sealing and insulation, were also the least visible and most poorly understood by homeowners. Additionally, few homeowners understood the value of paying $500 or more for a report just to learn what additional work they would need to pay for, especially when accustomed to free estimates from other trades.

To address this, Markowski started piloting "impact parties" with a few participating audit and whole-home efficiency contractors. Sharing characteristics of both the classic Tupperware party and the house party model often used by political or issue campaigns to develop volunteers and build interest, the impact party sought to leverage the social networks of homeowners, provide an in-depth review of whole-home retrofits in a comfortable setting, and give contractors an opportunity to both demonstrate their expertise and build relationships with customers. For the pilot, Markowski encouraged EI2 participating contractors to provide a free assessment for a party host in exchange for the opportunity to present at the party and receive leads from the attendees. Additionally, the contractors agreed to provide

[6] The system was not developed to allow tracking of phone calls to contractors, nor were contractors required to report on leads received, so we do not have an exact count. Based on discussions with contractors and page loads to the contractor listing, we believe the number is in the dozens.

assessments for the attendees at a reduced cost of $99. This helped to eliminate or reduce the financial barrier to starting the process.

The results of this approach were impressive. By mid-May, we had held four impact parties and 60 percent of the attendees had moved forward with having an energy assessment. Program staff had presented at nine community meetings and recruited 36 homeowners who were interested in volunteering their time to help spread the word about EI2. Seventeen of these volunteers attended a Saturday morning training session at our offices to learn more about the program. Despite some initial concerns about the costs, our participating contractors also appreciated the value of the opportunity to engage directly with homeowners and to be seen as the expert. Ten firms agreed to participate in the outreach efforts and provide the free and reduced price assessments.

Bringing it to Scale

With the failure to attract any significant homeowner participation by the end of the first quarter of 2012, it was clear to all that a significant number of changes were necessary to improve the EI2 single family offering. In the late spring and early summer, EI2 made several changes to its residential program. The gas utilities in the region were introducing changes to their rebate programs that either incented home performance upgrades or attic insulation. EI2 agreed to create a new rebate program that would complement the utility programs and create a uniform rebate amount across the region[7], offering a total combined rebate of up to $1750 for single family projects achieving the 15 percent reduction threshold. The utility programs, however, had very limited marketing budgets and historically had struggled to reach their production goals for home performance: it was clear that EI2 would need to contribute to homeowner enrollment to meet its own goals.

To accomplish this, CMAP approved a plan to hire 20 field organizers and deploy them across the region to utilize tactics similar to those used in the pilot. The funding for the effort came from the marketing budget overseen by FleishmanHillard, although the direction of the staff was overseen by Markowski and CNT Energy. The organizers were divided into five regions. Each region was assigned a regional lead field organizer who would serve as a team lead, and three field organizers. Each organizer (including the regional leads) were assigned a turf, or part of their region that they were responsible for. Each organizer was accountable for producing a set number of impact parties, community meetings, volunteers, assessment sign-ups, and ultimately retrofits within their turfs. Regional leads were given slightly reduced goals for their turf given that they had additional responsibilities for helping to supervise their team.

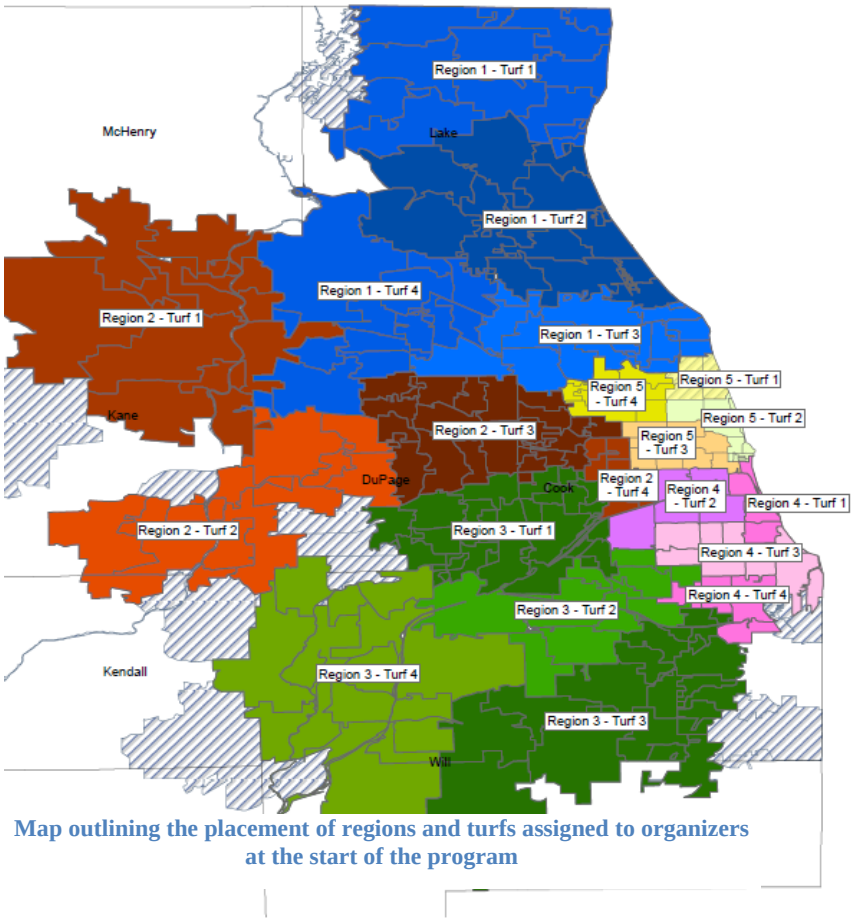
By mid-July 2012, FleishmanHillard engaged a temporary employment agency to assist in recruiting the field organizers and to serve as their employer. The qualifications for organizers included strong verbal communication skills, ability to work in a metrics-driven environment, and ability to rapidly adjust to shifting priorities. Experience in energy efficiency or construction, or work in political or community organizing, while desirable, was not a requirement. In addition to the recruiting efforts from the temp agency, CNT Energy provided resumes from applicants to various positions it had recently fielded. In less than two weeks, five regional leads were hired and spent their first six days on the job in an intensive training program for BPI Envelope Professional & Analyst certification to provide them with a more technical background. The regional leads assisted in the interviewing process for hiring the remaining 15 field organizers, and by the start of the first full week of August, the initial staff of 20 people were on board and reporting for training.

[7] Two utilities were incenting attic insulation only at a level based upon the square footage insulated. A third offered a percentage rebate of the cost of doing a home performance approach utilizing their vender. As EI2 was working across all three utilities, we wanted to create a uniform offering to simplify communications and avoid confusion.

The initial field organizer training was conducted over a weeklong period. Intended to be an intensive introduction to both community organizing and the particulars of the EI2 program offerings, organizers split their time between lectures and hands-on activities or group discussions. Organizers were given the opportunity to develop and practice their presentations on the program and to make phone calls to community leaders or elected officials to begin setting up activities in their turf, all with the support of their teammates. The training included demonstrations of home energy assessment tools, such as blower doors and IR cameras, as well as a field trip to a project under construction so the organizers would have a better familiarity with the technical aspects of the program. As organizers would frequently be working in homes, the training also emphasized safety and the organizers practiced handling difficult and unpleasant situations including encountering illegal activities, domestic violence, and child abuse.

In addition to the community work of the field organizers, it was clear that a major component to the ultimate success of the program would be the successful coordination and engagement of the participating contractors. While EI2 had previously established procedures for reviewing contractor qualifications and conducting quality control assessments on completed jobs, new procedures were going to be required to support contractors in delivering their component of the impact parties. CMAP agreed to support a contractor coordination position at CNT Energy who would be responsible for training contractors on their role in the program, addressing concerns, and monitoring and tracking their performance.

Outreach and Organizing Tactics



Map outlining the placement of regions and turfs assigned to organizers at the start of the program

Turfs were assigned to the field organizers based upon the market research previously conducted, focusing on communities with older housing stock that would see the greatest savings from energy efficiency improvements and on areas with high percentages of demographic groups that fit the progressive or cost-conscious categories. Eight turfs were created within the City of Chicago and the remaining 12 spread across the remaining suburban areas. Although the suburban turfs were broad enough to assign responsibility to an organizer for a lead uncovered almost anywhere in the region, in actuality, the organizer was expected to focus on one or two suburban communities within their turf that were believed to be the most promising.

The organizers deployed tactics with the goal of driving participation in the EI2 program in as little time as possible between the homeowner's first interaction with EI2

to the completion of their retrofit. Based on the pilot efforts and past organizing experience, our expectation was that we would accomplish our goal via the impact parties and other hard touch tactics which create a personal connection with the homeowner and allow for more in-depth conversations. However, in order to identify impact party hosts and establish credibility within communities, other tactics were also necessary.

One-On-One Meetings

As an introduction to their communities, field organizers launched their outreach efforts by engaging local elected and community leaders for one-on-one meetings. Leaders were identified though CNT Energy's existing database of contacts from its work in energy and sustainability as well as from public sources. As the regional planning organization, CMAP was also well positioned to provide a formal letter of introduction to local officials, as well as informal connections to local government. The purpose of these one-on-one meetings was twofold: to develop legitimacy in the community and to identify likely early adopters and volunteers. Community leaders, be they elected officials, chairs of civic committees, or leaders of local organizations, served as gatekeepers and knowledge sources for the organizers. Even if they did not actively support our efforts, their general awareness of the program helped to prevent negative backlash or questions when they later heard about the program from constituents or members. In many cases, the leaders could identify other organizations or individuals, uncovering homeowners who would be willing to become impact party hosts or volunteers to spread the word in their community. As the organizing efforts grew in a community, the role of one-on-ones diminished, although organizers continued to hold them through the end of the project, especially as new leaders were identified.

While it was not anticipated that these one-on-one meetings would result in substantial action from the leaders to actively promote the program, this did happen on occasion. Several elected officials in both the city and the suburbs volunteered to host impact parties in their own homes. One Chicago alderman and his wife hosted an impact party with nearly 30 attendees. In addition to the direct attention from the alderman's network, high-profile events such as this one afforded us with excellent earned media opportunities. Stories about these impact parties appeared in several local newspapers and helped create further interest in the program. Other leaders provided access to local newsletters or e-mail lists that were also helpful in both generating leads and securing additional volunteers.

Community Meetings and Community Impact Workshops

The field organizers actively sought out opportunities to deliver short (10 to 15 minute) presentations about the program at meetings already being held in their assigned communities. These meetings generated some immediate interest in the program with 18 percent of attendees signing up for an assessment. However, they were much more important for identifying impact party hosts. Proving there was interest in the program from groups beyond those seemingly sympathetic to its goals (such as environmental groups), organizers soon found themselves successfully presenting to a wide range of organizations and associations including block clubs, home owners associations, church groups, motorcycle clubs, employer-sponsored "lunch and learns," rotary clubs, and chamber of commerce meetings. We were able to find receptive audiences almost everywhere with no one particular type of meeting or organization yielding better results than another.

A church in Downers Grove, IL advertises an Impact Workshop

An impact workshop builds upon the community meeting concept by offering more time to go into greater detail about the EI2 program and energy efficiency. Program workshops were generally billed as unique events, rather than as part of a larger meeting, and were typically attended by homeowners with a strong interest in the topic area. While lead by an EI2 field organizer, the workshops often included a presentation from a participating contractor and a demonstration of some of the tools used to help diagnose energy loss including IR cameras and blower doors. More so than the shorter community meetings, these 30 to 60 minute workshops generated assessment sign-ups in addition to securing impact party hosts.

Although in some regards similar to a community meeting, the field organizers were trained to avoid tabling events. Our experience suggested that these events generally have a low return on time spent. Most people who approach the table have little interest in the topic or are looking for free goodies. Rarely is it possible to engage them in the in-depth conversation necessary to demonstrate the value of making a substantial, unplanned investment in their home. Additionally, without the legitimacy lent by a community-based partner, it is difficult for a field organizer to differentiate themselves from a salesperson in the eyes of often skeptical consumers. On occasion, however, field organizers did attend tabling events if it was important to maintain relationships (often such fairs were priorities of other organizations or community leaders) or if they were especially relevant to our message. A few field organizers found that at targeted events, and with an extremely outgoing attitude, they could recruit sign-ups, although this never became a preferred tactic as it lent itself to more of a sales approach and less of a community-based participation model.

Impact Party

The primary tactic used by the field organizers to engage homeowners was the impact party. As previously described, a volunteer host would invite 5 to 10 other homeowners to their home to learn about the program from the field organizer and, most of the time, from a participating contractor as well. In exchange for hosting the event, the host received a free energy assessment[8]. Guests were encouraged to sign-up for a $99 assessment or to host their own impact party. Parties typically lasted one and a half to two hours and were generally held in the evenings, although organizers scheduled and attended parties every day of the week, from morning to late evening.

An EI2 Field Organizer presenting at an impact party

Over the course of the program, the formula for a successful impact party became fairly standard. Once a homeowner volunteered to host a party, the assigned field organizer scheduled a time to meet the homeowner to review expectation. This was ideally done in person, although it often took place over the phone due to scheduling preferences. The homeowner was coached on how to leverage their social networks to approach and invite friends, family, and neighbors as well as how to follow up and reconfirm with attendees. The approved contractor would arrive ahead of the party to conduct the audit, or if time did not allow, to at least scope out the home and identify problem areas. The field organizer would start the presentation, introducing the program, its funding source and financial incentives available, and briefly highlight the standards required of our

[8] As previously noted, in the pilot, this assessment was provided free by the contractor. When the program was brought to scale, one of the gas utilities partnering with EI2 required utilizing their selected program implementer as the assessment contractor. They were already charging $99 for assessments and were unwilling to provide them free to the party host. Therefore, EI2 agreed to cover the $99 cost for the host, and out of fairness to the other contractors in other utility jurisdictions, made this offer universal, although many contractors never claimed the $99 from the program for their parties.

participating contractors. The organizer would then turn the presentation over to the contractor who would provide a brief introduction to building science and how air sealing and insulation improvements save energy. The contractor would then physically lead the guests through the home to point out areas where efficiency measures could be implemented, bringing the building science concepts to a more practical and visual level. In most cases, this tour would be conducted with a blower door and IR camera, although depending on weather, safety concerns[9], and more, this was not always possible. The party concluded with the contractor addressing questions from the group. The field organizer would then signup other homeowners in attendance for future energy assessments, capturing contact information that we used for scheduling.

The presentations from the organizers were deliberately low-tech. Although we could have supported a budget for portable projectors and additional materials such as PowerPoint presentations, we believed that these efforts ultimately created more distance between the presenter and the audience, especially in the informal and intimate setting of someone's home. Our goal was community integration; we sought to be seen as a neighbor, not a well-polished salesperson. Therefore, while professional in demeanor and content, we used flipcharts and conversation to deliver our message, as well as large printed photographs to demonstrate complicated building science topics. Similarly, while we had leave-behind brochures available for events, field organizers understood that it was always preferable to get a homeowner's contact information and follow-up, rather than providing our information and hoping they contact us. Engaging in conversation nearly always results in a greater likelihood of follow-through.

Out of both necessity due to scheduling demands and curiosity to test different approaches, we also held a significant number of impact parties without a participating contractor, relying on the field organizer to communicate the building science messages. The regional leads who had earned BPI certifications were able to demonstrate the blower doors. Other organizers were provided with an IR camera, but not a blower door, so that they could still provide a visual "wow" to the party attendees. The difference in sign-up rates between these parties and ones with a contractor were generally similar. Field organizers reported no obvious difference in attendee satisfaction or interest. Several field organizers felt the parties without contractors were actually preferable since it eliminated a potential variable in the delivery of the presentation because they had more control over the event. However, given our belief that it is in the long-term interest of the industry and contractors to be able to develop relationships with homeowners, we generally continued to schedule a participating contractor to attend impact parties whenever possible.

Earned Media and Newsletters

Our community focus and impact party approach proved newsworthy in and of itself. Without dedicated effort, field organizers frequently found their work the subject of coverage in local papers, online blogs, and various news outlets. As previously noted, this often happened when an elected official hosted an impact party, but also resulted when reporters were already covering community meetings where a field organizer presented, or from a causal connection to an impact party host. Arguably the largest news story on the EI2 program was a six minute segment on the Chicago PBS affiliate's nightly news program. While this ultimately involved a great deal of work from media professionals, it started quite organically with a connection to a producer identified from a field organizer's work. These news stories, or earned media, developed further interest in the program from homeowners and helped confer legitimacy on the program. Homeowners frequently appeared at events with a local newspaper story in hand.

[9] Contractors were required to adhere to the safety requirements in the BPI standards and not perform blower door tests without first assuring there were no potential asbestos containing materials and that combustion appliances were functioning appropriately.

Field organizers actively sought opportunities to have information on the EI2 program placed in organizational, municipal, or community newsletters and e-mail blasts. FleishmanHillard provided pre-written content on energy efficiency and information on EI2 programs for inclusion in various newsletters. We found that these newsletter sources were often excited to have relevant (and pre-written) material, especially for a program with verified and trusted credentials. While we anticipated that newsletters would help us secure impact party hosts, we were pleasantly surprised to find a larger than anticipated assessment sign-up rate directly from these newsletters.

Volunteers

With the goal of both leveraging their work and creating a network that would survive beyond the limited BBNP funding, field organizers were also tasked with recruiting and developing volunteers in their turfs. Volunteers were provided with increasingly demanding tasks to verify their commitment and understanding of the program. Most volunteers began by hosting an impact party, but continued helping to recruit and prepare other impact party hosts down the road. Many also helped identify additional community groups or organizations to deliver community meetings to and worked to further disseminate our newsletter articles. Formal training was offered approximately every 4 to 6 weeks for volunteers who were extremely interested in the program. These trained volunteers also helped to present on the program at community meetings and at tabling events.

The most productive volunteers were those already pursuing related efforts through a community group or other organization. For example, a local chapter of the Sierra Club adopted promotion of EI2 as part of its messaging around what citizens could do to act on climate change. Six members attended a formal training on the EI2 program as a result. Another sustainability organizer in Oak Park (a near suburb) recruited 10 house party hosts in less than two weeks.

Monitoring and Tracking

This form of community organizing is highly reliant on detailed metrics. As noted previously, each field organizer was provided with goals to achieve in his or her turf, both for process steps (number of one-on-one meetings, number of community meetings, number of impact parties) and outcomes (number of assessment sign-ups and number of completed retrofits). These goals were aggregated by region and the regional lead was accountable for the overall goals in his or her region. We used SalesForce, a web-based customer relationship management (CRM) system that could be accessed by all our field organizers as well as our call center staff, to capture the data necessary for tracking these metrics and to better ensure a uniform and consistent repository of information. Field organizers recorded every contact with a homeowner or community leader as an entry in SalesForce, allowing us to track progress and report on successes. Homeowners contacting the program through our call center were also asked how they heard about the program. As contractors reported audits and completed projects, this information was entered into SalesForce and matched against the field organizer's records to allow for clear capturing of the results.

Although generally working remotely in their turfs, the field organizers had a weekly in-person staff meeting (as well as periodic conference calls) where a review of the metrics was a standing agenda item. This assured that the team understood their progress and could help one another to identify opportunities to make improvements or share lessons learned. The team sought ways to make the goals more fun, even holding contests between organizers and regions for exceeding the goals[10]. More formal individual reviews were also held between organizers and the outreach coordinator, and when necessary,

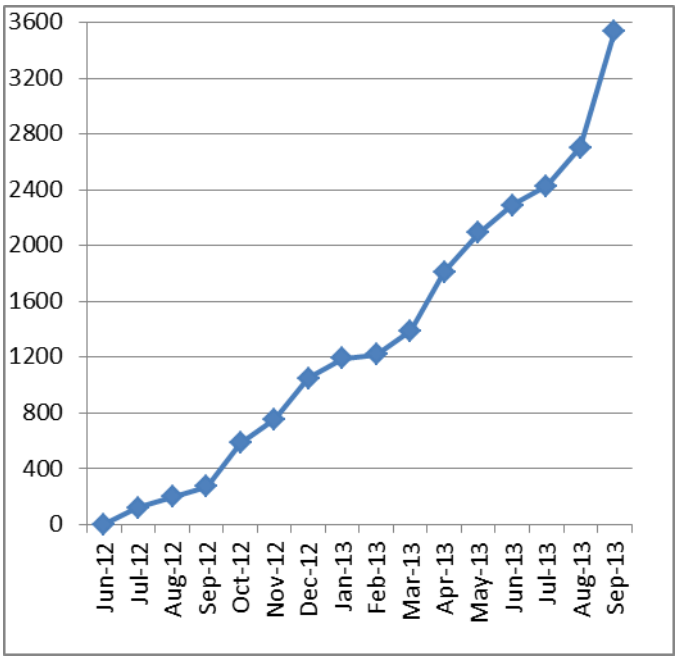
[10] In one particularly entertaining case, the losing teams had to compose odes in honor of the winning teams

low-performing organizers were given improvement plans or discharged. Throughout the program, the metrics were also closely monitored by CMAP and provided to BBNP and other stakeholders.

Results

With only a handful of completed single family projects at the summer of 2012, expectations for the results were muted, with an optimistic goal of reaching 1,600 homes by the end of the program. However, 13 months later when the project reached its conclusion at the end of September 2013[11], nearly 3,600 single family homeowners had completed a qualifying energy efficiency upgrade. An examination of the results by month (see Chart 1) demonstrates that there was a clear ramp-up period while the field organizers developed relationships in their communities. There was also a clear rush at the end of the project to complete projects in order to qualify for the additional rebates being provided by the EI2 program. This rush was both a reflection of homeowners making a decision to take action as well as contractors making the effort to complete long accumulated paperwork on previously completed projects.

Chart 1 - Number of Completed Single Family Retrofits by Month



As detailed in Table 1, the field organizers and homeowners hosted more than 650 impact parties over the 13 month period. Along with the more than 1,000 community meetings they attended and the nearly 1,500 one-on-one meetings held with community leaders, this resulted in over 6,100 assessment sign-ups throughout the region. Compared to the original goals set, the field organizers held substantially more one-on-one and community meetings but fewer impact parties, ultimately reaching a sign-up goal that was on target. The conversion rates for the number of attendees at both community meetings and impact parties who would sign up for an assessment proved to be much higher than we originally anticipated, allowing us to have fewer parties while still meeting goals.

Placing 20 field organizers throughout a large region was not inexpensive. From July 2012 to September 2013, a total of $2.3 million was budgeted for the outreach efforts, or approximately $156,000 a month. The total budget, divided by the total number of assessment sign-ups creates an overall project cost of $382 per sign-up. However, in the months with peak productivity, the cost per sign-up was less than $90[12]. It is possible that the project costs could have been further lowered by utilizing a staffing model not dependent upon a temporary employment agency.

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[11] Note the program had been originally scheduled to conclude May 18, 2013, but BBNP offered CMAP a no cost extension to September 30, 2013 for the entire program. Field organizers continued working in full strength through July. In August and September, the staff was reduced to 9. BBNP has since awarded CMAP another extension through November 1, 2014 for financing programs only. A half-time outreach coordinator remains funded to support continued engagement of the volunteers recruited during the program period.

[12] January, February, and April of 2013 were amongst the months with the lowest costs per sign-up, calculated simply as the outreach costs for the month divided by the number of sign-ups. This represents, to some extent, the ramp-up period. Future months were somewhat less productive due to a need to adjust targeted communities due to the sign-ups overwhelming the

As previously noted, the addition of the field organizers and the pilot outreach approach were not the only changes made to the EI2 program in the summer of 2012. There is no doubt that offering a significant and uniform rebate across the region contributed to homeowners' interest in the program. Measuring the relative impact of the outreach efforts to the rebate structure is not possible, but it is worth noting that the pilot outreach efforts were producing traction prior to the rebate program. Anecdotally, as the time frame to receive a rebate was closing and contractors could no longer schedule construction in time to receive it, homeowners continued to express interest in holding impact parties and scheduling assessments, supporting the notion that the tactics can continue to drive interest even without a substantial rebate contribution.

Tactic	Cumulative Total – 8/12 to 9/13
One-on-One Meetings Held	1449
Community Meetings Held	1001
Impact Parties Held	652
Assessment Sign-Ups	6112
Volunteers Participating	283

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availability of assessments in one utility area.