

When it's time to join

1. Find your registration confirmation
2. Click to Join
3. If the connection is slow, you can call in
4. Make sure Zoom is installed – it's free and can be done on your phone

Thank you for registering for "Test Meeting".

Please submit any questions to: Charlotte.Morrow@evergreen-efficiency.com

Date Time: Jul 26, 2020 05:00 PM Pacific Time (US and Canada)

Join from PC, Mac, Linux, iOS or Android: [Click Here to Join](#)

Note: This link should not be shared with others; it is unique to you.

[Add to Calendar](#) [Add to Google Calendar](#) [Add to Yahoo Calendar](#)

Or iPhone one-tap

US: +13462487799,,92885365655# or +16699006833,,92885365655#

Or Telephone:

Dial(for higher quality, dial a number based on your current location):

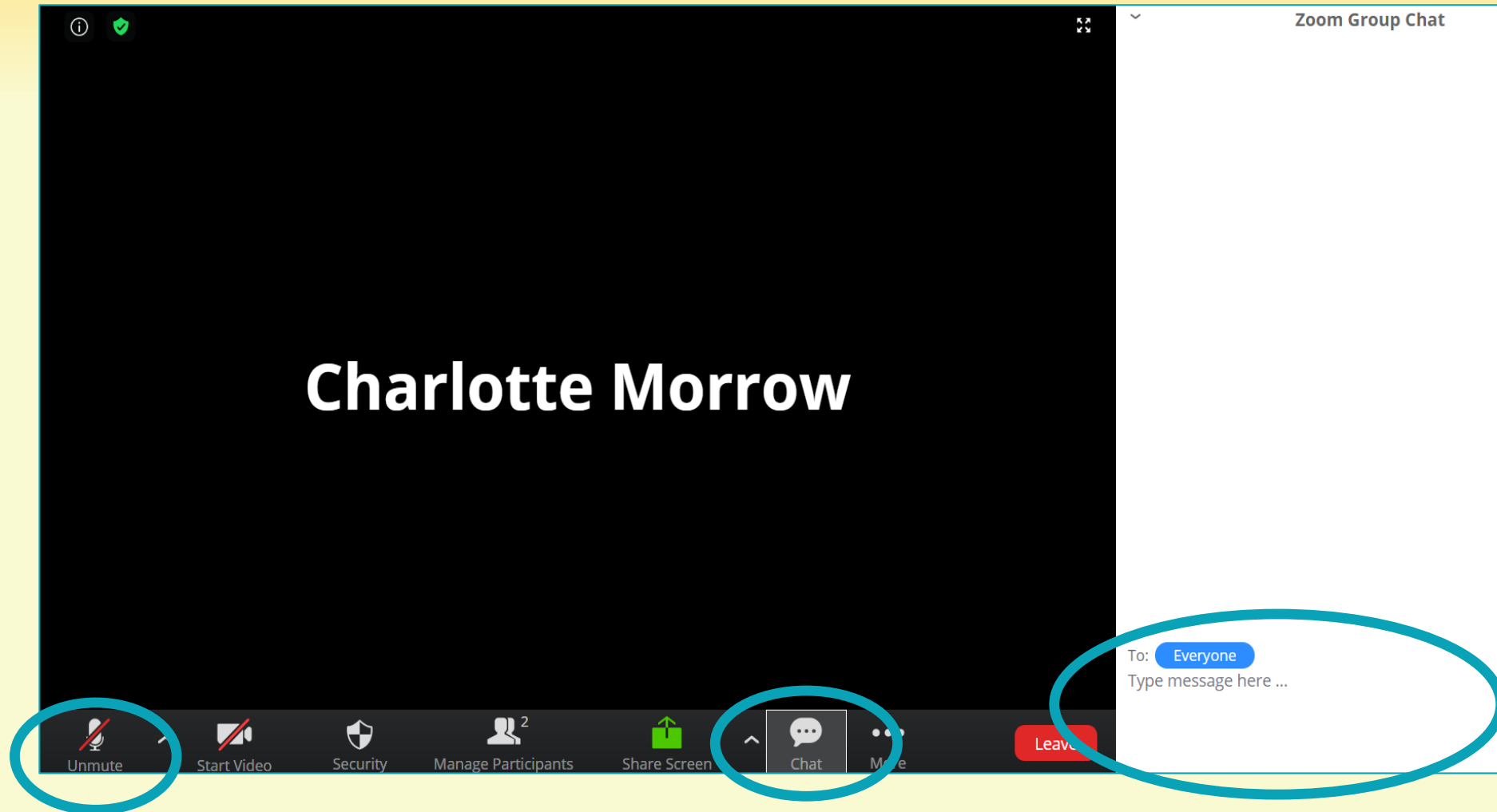
US: +1 346 248 7799 or +1 669 900 6833 or +1 253 215 8782 or +1 312 626 6799

Meeting ID: 928 8536 5655

International numbers available: <https://evergreen-efficiency.zoom.us/j/92885365655>

Low-Income Energy Efficiency Workgroup

1. We want to hear from you!
2. Unmute to join, remember to mute when you're not talking.
3. Feel free to use the Chat to ask questions.





Low-Income Energy Efficiency Workgroup

November 17, 2020



Today's Agenda

- Welcome & Roll Call
- Quick Overview: Low-Income New Opportunities Guide
- Low-Income Coordination and the Comfort Ready Home Program
- Discussion: How Can Comfort Ready Home Support You?
- Next Workgroup & What are Pressing Topics?

Low-Income New Opportunities Guide

- Focus on supporting and building relationships
- Resources include:
 - Funding sources
 - Income qualification information
 - Case studies
 - Examples of qualifying documentation
 - Contact information for Community Action Agencies

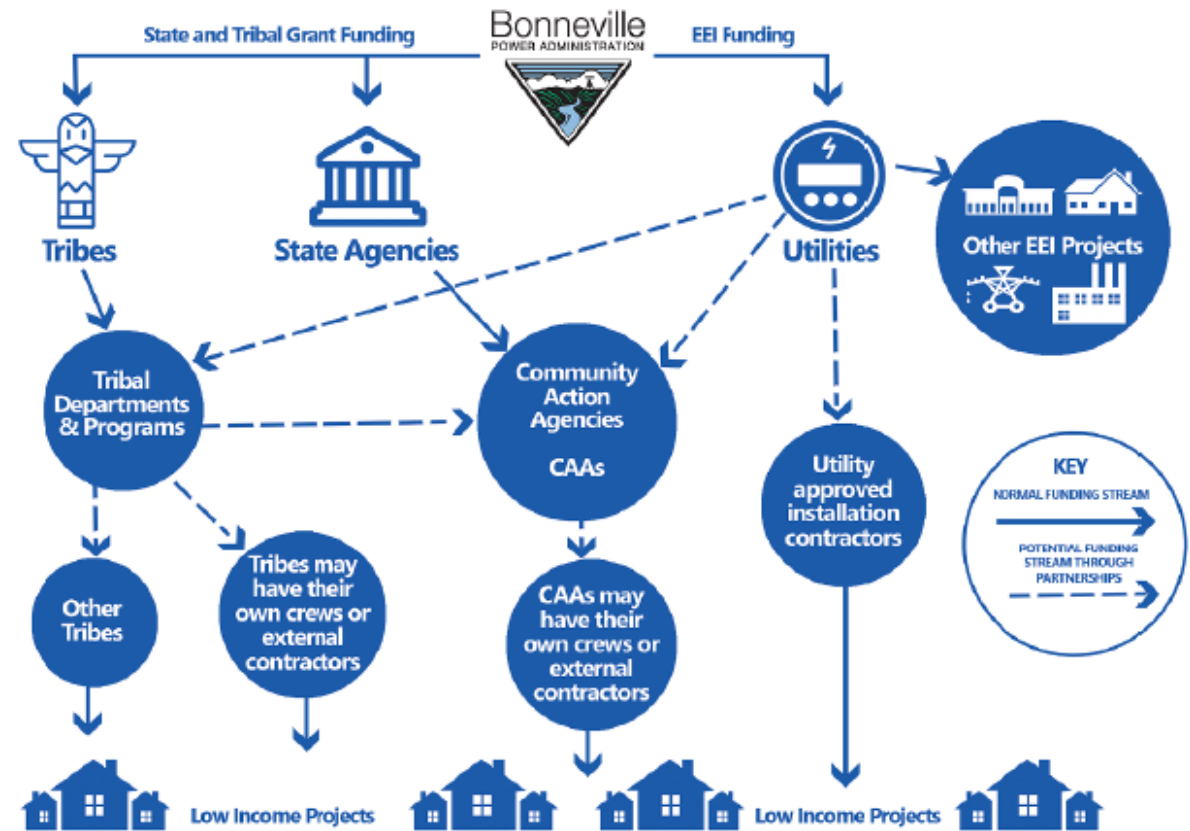


Low-Income New Opportunities Guide

- Informative funding pathways diagram added
- Most up-to-date version online

Have a question, need a correction made, or see some critical missing information?

Please contact Amy Burke at aaburke@bpa.gov.





ComfortReady HOME

Real Comfort. Real Savings. Real Smart.

Amy Burke

Low-Income and Weatherization
Program Manager, BPA

Rob Burr

*Comfort Ready Home Program
Manager, BPA*

Jess Kincaid

Residential Sector Lead, BPA

Charlotte Morrow

*Comfort Ready Home Program
Manager, Evergreen Consulting Group*

Low-Income Coordination

Comfort Ready Home Pre-Launch Discussion

November 17, 2020

Program Agenda



1. **Introducing Program Staff**
2. **Program Overview**
3. **Program Coordination**
4. **Discussion**
5. **Next Steps**

Introductions



Amy Burke, BPA Low-Income and Weatherization Program Manager



Charlotte Morrow, Program Manager, Evergreen Consulting Group



Rob Burr, BPA Comfort Ready Home Program Manager



Jess Kincaid, BPA Residential Sector Lead

Program Overview

Program Objectives

As a support arm to your program, our aim is to help you:

Increase the uptake of measures in BPA's program service area.

- Insulation.
- Windows.
- Residential HVAC, including Performance Tested Comfort Systems, or PTCS.
- High-efficiency water heating.

Increase Residential contractor satisfaction with BPA's Residential energy-efficiency programs.

- Field support.
- Marketing materials.
- Homeowner education and resources.
- Cross-promotion and leads.

Create a Residential Contractor Network.

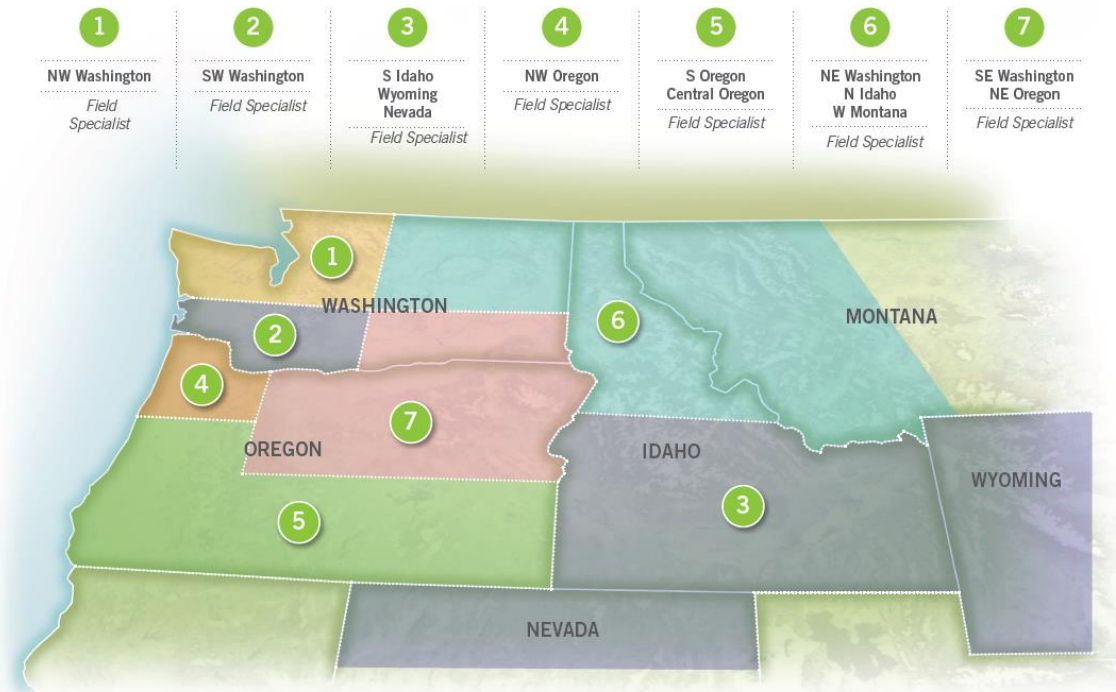
- Recruit and train more contractors.
- Increase energy-efficiency projects installed by contractors.
- Improve quality of installations using recommended practices.
- Enhance knowledge of how to select and sell higher-efficiency products.
- Improved knowledge of how to ensure realization of energy savings.



Local Technical & Program Support

Field Specialists and Utility Programs

- Field Specialists (7–8) stationed throughout the region.
- Offer training, technical, sales and incentive program support to contractors.
- Offer customizable services for utilities.



Training Workshops & Webinars

Technical Expertise on Weatherization Measures

- In-person training will coordinate with WAP training centers (when this activity resumes in 2021.)
- Webinars or workshops will be hands-on and interactive.
- Focused on:
 - Improving quality installations.
 - Understanding programs and requirements.
 - Helping contractors expand their business.

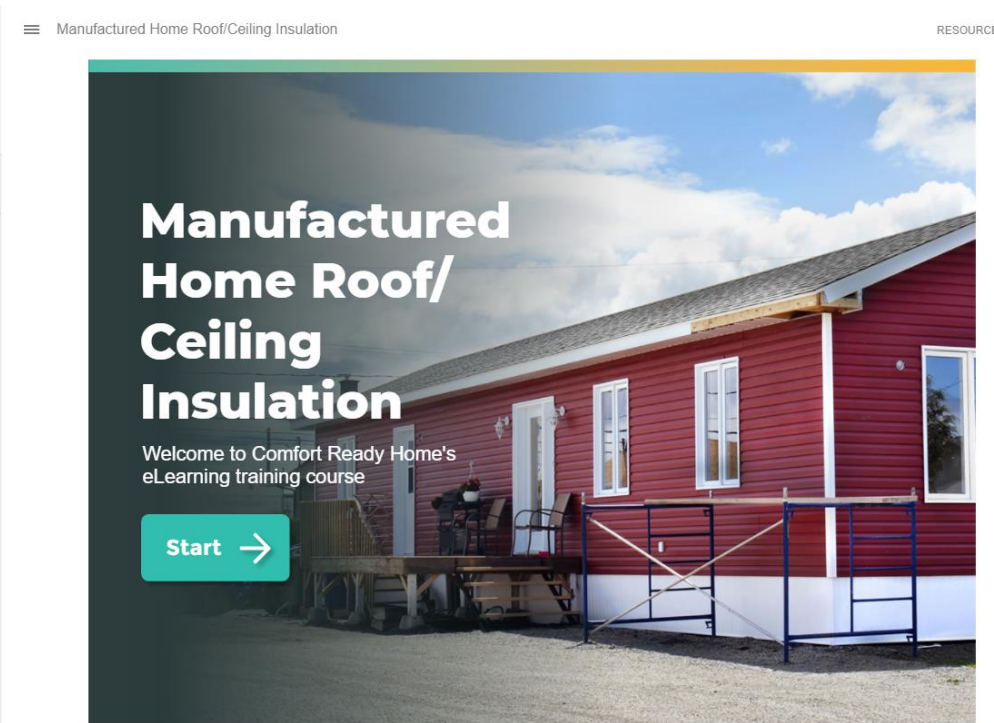
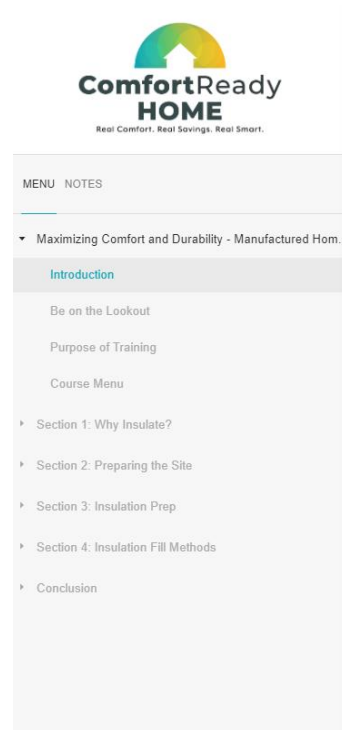


Online Learning Center

On-demand training for contractors and utilities

Five on-demand courses to increase uptake and improve completions

- Comfort Ready Home Program Overview.
- Effective Air Sealing Made Simple.
- Site Built Home Insulation.
- Filling the Belly: Manufactured Home Floor Insulation.
- Maximizing Comfort and Durability: Manufactured Home Roof/Ceiling Insulation.



Technical & Program Field Guide

A handy resource available in print and online

- Program resources including product guides and utility contact information.
- Technical guides for contractors, including specs, installation and invoicing checklists, and recommended practices.
- Low-Income referral section.



Residential Field Guide

Program Website

Connects Utilities, Contractors and Homeowners

ComfortReadyHome.com

- Lookups to find a utility, a contractor or a Field Specialist.
- Resources such as the Field Guide and product guides.
- Points to regional resources including state income based programs.



[CONTRACTORS](#) [HOMEOWNERS](#) [UTILITIES](#) [TRAINING CENTER](#)



Homeowner Resources

Resources for the future – program rollout 2021-2022

Homeowner Resources

- Consumer-friendly website with easy access resources:
 - Find a contractor.
 - **Product guides.**
 - Spanish language.
 - DIY training.
 - Information on local financing resources.
 - Income qualification and income-based service provide contact information.



Upgrade to High-Performance Insulation

Professionally installed insulation will help maintain more constant and comfortable temperatures in your home while preventing build-up of

Marketing Resources

Toolkits for you and your contractors

- For utilities and contractors to use with homeowners.
- Social media best practices guide, postcard mailers, newsletters and email communication.
- Product guides in Spanish and English.
- Website-in-a-box for contractors to help expand their business.

Sales Tips and Best Practices for Installers

Many homeowners think of energy-efficient products and services as premium options and, perhaps as a result, installers often rely on upselling to promote these measures. Instead, try reframing the discussion to show that energy efficiency comprises a suite of solutions that address the homeowner's pain points while meeting or exceeding expectations thanks to superior comfort and savings.

This approach opens the door to "package" sales of complementary upgrades and an increased project volume, and it can lead to valuable referrals from happy customers. Try implementing these best practices in your sales process.

Cross-sell energy-efficient services. (Even the ones you don't offer!)

A great way to add value to the energy-efficient products and services you offer is by recommending other services that would allow the homeowner to get more out of their investment. For example, let the homeowner know that performing duct sealing will help them get the most out of the insulation you're adding.



Upgrade to High-Performance Insulation

Professionally installed insulation and air sealing helps to maintain a more constant and comfortable temperature in your home while preventing buildup of moisture and condensation.

WHY UPGRADE?

Did you know that air leakage and improperly installed insulation can waste 20% or more of the energy used to heat and cool your home? That's why air sealing and adding insulation are two of the most cost-effective ways to increase home

Discussion





Low-Income Coordination

How can we support you?



Residential Field Guide



Are there resources that we should build out to help you deliver your program?



How can we meet your expectations for support?

Are there services or areas of the program that could create any challenges for you?



How would you like referrals from the field to flow to your program?

How do you want us to communicate to customers about your waitlist (if you have one)?



Do you need or want support recruiting additional contractors to support your program?



What information would you like Field Specialists to have on hand for contractors and homeowners that might qualify for free services through income-based programs?



The Field Guide currently has:

- Income qualification guidelines.
- State contact information.

Would you like your contact information added to our website or Field Guide insert?



Do you have staffing resource needs with regard to multifamily project management that our program can support?

We want to highlight the great work you're doing.

Would you be willing to share with us your photos from the field?

Would you like to have your program featured in our blog?





Next Steps

When services are live, an announcement and list of options will be sent to BPA's utility customers.

Join us for a launch webinar,
Jan 14th 12-1

Questions and requests for services, contact:

Amy Burke, Low-Income and Weatherization Manager,
aaburke@bpa.gov

Next Workgroup

- Next Workgroup is tentatively scheduled for Tuesday, January 19th
- What pressing topics would you like to cover at our next meeting?
- *(time allowing)* Roundtable

Have any questions or concerns?

Please contact Amy Burke at aaburke@bpa.gov or 503.230.4364

Thank you!