



## Organizing Home Energy Visits

### Implementation Guide

#### Summary

Home energy visits are one of the most effective methods for encouraging residents to move forward with comprehensive home efficient improvements because they provide home-specific information on energy saving opportunities. Under a home energy visit, trained volunteers conduct on-site walk-through assessments (not energy audits!) of energy saving opportunities in the home and sit down with the homeowner to have a “kitchen-table talk” to share results and resources. The walk-through assessment involves identifying basic energy saving opportunities, such as lack of insulation and air sealing in the attic and basement. Unlike previous version of this program, the current program does not include direct installation of free energy saving products by volunteers, such as compact fluorescent lightbulbs. Rather, volunteers can encourage residents to sign-up for and receive free energy saving kits.

This program was previously implemented under the Vermont Community Energy Mobilization Project (VCEM) wherein volunteers in more than 30 communities conducted 1100 home energy visits. Subsequently, over 10% of homeowners that received a home energy visit successfully completed comprehensive energy efficiency improvements under the Home Performance with ENERGY STAR program.

#### This guide includes the following sections:

- Roles and Responsibilities
- Timeline
- Building the Project Team
- Recruiting and Training Volunteers
- Identifying and Signing Up Program Participants
- Organizing Home Energy Visits
- Monitoring Results
- Resources

#### Roles and Responsibilities

- **Efficiency Vermont** will provide overall guidance and training to local partners. Efficiency Vermont will train volunteers on how to conduct home energy visits and will provide guidance for local partners on how to effectively implement the program. Efficiency Vermont will provide a template home visit form as well as educational materials on financial and technical resources to distribute to program participants.
- **Regional partners** will coordinate and organize forums for local partners on how to effectively manage a home energy visit program and will organize workshops for volunteers on how to actually conduct a home energy visit.

- **Local partners** are responsible for coordinating the home energy visits in their communities, including recruiting and organizing the volunteer training, identifying and signing up program participants, scheduling home energy visits, and conducting follow-up with home participants. Community volunteers conduct the home energy visits, educate homeowners, and provide information and incentives to home participants.

## Timeline

Below is a proposed timeline for implementing home energy visits in your community:

	Month 1	Month 2	Month 3	Month 4	Month 5
Efficiency Vermont conducts workshop on how to organize home energy visits	X				
Local partners recruit volunteers	X	X			
Efficiency Vermont conducts volunteer training		X			
Local partners recruit program participants	X	X	X	X	
Volunteers conduct home energy visits		X	X	X	
Local partners provide results to Efficiency Vermont			X	X	X
Local partners close out projects					X

## Building the Project Team

As noted above, local partners are responsible for coordinating the home energy visits within their communities including identifying and signing up program participants, scheduling home energy visits, tracking project results, and conducting follow-up with home participants. Local partners from the first round of VCEM indicated that coordinating the project involves an average of 10-20 hours per week. We recommend that local partners build a strong team of volunteers to undertake coordination functions associated with implementing this program, including scheduling home energy visits (coordinating between volunteers and participants).

## Recruiting and Training Volunteers

One of the keys to home energy visits is finding community volunteers who are able to donate their time to help fellow community members save energy. Efficiency Vermont will train volunteers on how to conduct a home energy visit. This training is required for all individuals who are interested in being volunteers in the program. The training is expected to take 2-3 hours and will be organized by regional partners. Efficiency Vermont will provide all training materials and will cover associated training costs.

To identify potential volunteers, we suggest teaming up with other organizations, groups, agencies, and institutions working in your community – particularly groups that have a volunteer or service component to their work. Potential groups include:

- Town energy committee or conservation committee
- Civic groups such as Rotary and Kiwanis Clubs
- Students from local colleges
- High school and vocational schools (community-based learning or service)

- Housing groups such as Habitat for Humanity
- Faith-based groups such as churches and other religious institutions

Potential volunteers will want to know the expected time commitment of the program. The time commitment really depends on the number of homes you plan to visit and how many volunteers you hope to secure. ***We propose that you ask each volunteer to commit to at least one full day or approximately eight hours of volunteer time*** – though some may be willing to work more hours.

It is important to understand that volunteers have a limited amount of time that they will be able to devote to this program. Thus, it will be critical to solicit and secure a sufficient number of volunteers to meet your stated goal. Our experience from the first rounds of the program is that some volunteers will exceed this commitment level and some will fall short. In addition, local partners said that personal contact and tapping into existing social networks was the most effective way for finding volunteers.

There are several success factors in working with volunteers. These include:

- ***Appreciation and acknowledgement:*** People volunteer for a variety of reasons, including helping others, being devoted to a cause, knowing someone else involved in a particular cause, or seeking experience or academic credit in a particular field. Whatever the reason, volunteers like to be appreciated and acknowledged. Be sure to thank volunteers for their help at every opportunity. Consider organizing a volunteer dinner prior to the launch of the home visits to go over the plan. When the program is completed, be sure to acknowledge the efforts of volunteers in local newspapers and newsletters and to plan a celebration to recognize the efforts of volunteers
- ***Flexibility:*** It is important to recognize and respect each person's motivation, time availability, and commitment. Situations might arise in which other priorities in a volunteer's life take precedence over the work he/she does for your group, and it is important that you are able to accommodate such situations and work around them as necessary.

### **Identifying and Signing Up Program Participants**

Efficiency Vermont encourages you to work with other organizations, groups, agencies, and institutions in your community – such as select boards, social service agencies, community action agencies, local food shelves, and civic and community groups. These groups can encourage their members to participate in the program, or can identify individuals who might be interested in participating. It is also worthwhile contacting organizations which already go into people's homes to provide a service, such as the Visiting Nurses Association, Special Services Transit Authorities, Meals on Wheels (AAA), and others.

We encourage you to ask to meet with representatives of these groups and/or get permission to speak at one of their meetings to explain the program, solicit their help in promoting the program, and invite people to participate. As you prepare for your meeting, consider viewing the home energy visit program through their eyes. Be sure to emphasize different benefits of the program depending on the interests of the organization, such as human health, cost savings, energy savings, CO2 reduction -- whatever most motivates them.

Efficiency Vermont will provide you with samples of the following outreach and promotional materials: press release, public service announcement, project talking points and door hanger. If you choose to send mailings, Efficiency Vermont suggests sending postcards using your town's non-profit mailing

account. Given that this is a volunteer initiative, mailings should stress that every home may not be reached and that this project does not constitute a full home energy audit.

It is important that residents in your community understand that this program is available to everyone regardless of their income levels (though some communities may choose to have a special focus on more “vulnerable” members of the community). Efficiency Vermont is encouraging maximum flexibility in the methods you use for reaching out to community members. We anticipate that each home energy visit will be scheduled in advance. Thus, the main thrust of your outreach efforts is to develop a list of individuals who are interested in having a home energy visit.

Efficiency Vermont suggests using a wide range of approaches to identify individuals for the home energy visits:

- **Personal contact:** The most effective means for getting people to participate in VCEM is through personal contact either through phone calls, giving announcements at various organizational meetings, or face-to-face conversations. Ask other organizations in your community to commit to making phone calls to their members or clients to sign up for the program.
- **Email alerts, newsletters, and newspapers:** Ask other organizations to publicize the program in their newsletter or through email alerts. You can offer to provide them with an announcement, electronic flyer, or other content for them to post and distribute within their list serves. Further, we encourage you to contact local newspapers to publicize the program. You will want to place notices about the program in community publications, including school newsletters and monthly community newspapers. You can also consider sending your local newspapers a press release announcing the program and then following up with a reporter about doing a story. Note that deadlines vary, but can be two weeks or more in advance of the event.
- **Door-to-door:** For more densely populated areas, you might want to consider a door-to-door approach where community members provide information about the program and solicit participation. If people aren't home, Efficiency Vermont has developed a door hanger describing the program and providing space for you to leave local contact information.
- **Targeted direct mail:** You might want to consider sending program announcement brochures to community members or a segment of the community with information on how to sign up. This can be followed up with a door hanger placed on all doors.
- **In-store demonstrations:** You can ask retailers to provide a display stand about the program encouraging people to sign up.
- **Media:** We encourage you to contact both local newspapers and radio stations to publicize the workshop, as well use social media such as Facebook and Twitter.

Many local coordinators from previous rounds of VCEM noted that it was sometimes difficult to secure the participation of people who could benefit most from a home energy visit, e.g. lower income populations and/or homes that showed significant ice damming issues. Several previous VCEM communities were successful in their efforts to reach these target populations. For example, the

coordinator from the Town of Ripton made personal calls to those individuals he felt could benefit the most from the program. In Marshfield, the local coordinator drove around town and identified which homes looked as though a home energy visit was needed, e.g. identifying ice dams and rooftop snowmelt. In sum, communities need to make a concerted effort to reach out to those in need, such as making direct calls to individuals who can really benefit from the program, as well as working directly with organizations that already provide assistance to lower income people.

When you receive a call requesting a home energy visit, we strongly encourage you to use the caller intake form provided by Efficiency Vermont. You will want to take down contact information, provide a date for the home energy visit (if possible during the call), clarify whether the caller is the home owner or a renter (landlords must first sign a waiver), and identify whether a hot water jacket will be needed during the visit. Please see the caller intake form for more detailed information.

### **Organizing Home Energy Visits**

One of your key tasks as a local partner will be scheduling the volunteer teams. We suggest picking several weekends as a focus for your efforts and asking volunteers to commit to one or more days. We suggest starting each home visit day with an early morning gathering at a central location to “rally the troops,” and give folks their assignments.

Efficiency Vermont will provide a “Home Energy Visit Form” for each visit that includes a checklist for the walk-through energy assessment and talking points for the kitchen table conversation. We will provide educational materials and references for volunteers to leave with residents, including information on local energy auditing services and financial resources and incentives.

**Estimating the Number of Home Energy Visits:** As noted above, the number of home energy visits you will be able to conduct is directly related to the number of volunteers you have and how many hours each volunteer is willing to commit. To develop this estimate, it is important to note that each home visit will take approximately one hour to complete plus travel time. Efficiency Vermont requires that local partners use a two-person team for each home visit. This team approach is designed to match up volunteers with complementary skills, e.g. people with technical skills versus people skills. Thus, over the course of a full day, two volunteers should be able to cover 5-6 homes (allowing for travel time).

Further, we encourage you to build in a buffer so that you don’t over-commit on the number of homes you can reach. For example, if you have 20 volunteers signed up who have each committed to one full day, (assuming teams of two people each and an estimate of 5-6 home visits per day), you should be able to conduct 50-60 home visits (10 teams x 5-6 visits each). We suggest that you actually reduce this estimate by 20% (or 8 home visits) so that your actual commitment level would be 40-45 visits.

For potential program participants who call in after this number is reached, we suggest placing these individuals on a “waiting list” to be scheduled when volunteers become available. Our sense is that success breeds success. If you have a successful program, word will get out – both in terms of participants as well as volunteers. Many folks who are participants might want to become volunteers. Many volunteers, once they have done the home visits, might get excited and sign up to do more. However, it is best to set expectations at a reasonable level and then meet additional demand for the home energy visits as your resources allow.

**Home Intake Forms:** The home intake form is a critical document. It captures the data on energy saving opportunities found in each home. Please make sure that volunteers drop off their home intake forms

at the end of each home visit day, along with remaining materials. We will also provide you with a number of stamped envelopes so that you can return the home intake forms once you have tabulated the results. We ask that you send these forms back on a regular basis to Efficiency Vermont.

**Liability coverage:** All volunteers participating in the VCEM Project will receive some liability coverage through Efficiency Vermont. This coverage includes up to \$10,000 of medical payments for injuries caused by an accident (other than auto) because of operations while volunteering with Efficiency Vermont and claims filed against a volunteer alleging bodily injury or property damage in connection with volunteer work on behalf of Efficiency Vermont. Efficiency Vermont will **NOT** cover any accident or costs associated with your automobile. Volunteers who use their vehicles for this project must hold a current license and use a properly registered, inspected, and insured vehicle. Volunteers will be required to sign a statement to this effect during the training.

### **Monitoring Results**

Efficiency Vermont anticipates several components to the evaluation process. First, as noted earlier, volunteers will be asked to complete a “Home Energy Visit Form” for each home they visit. This form tracks the address of the home visited and incorporates notes from the visual inspection of the home.

Within a month after conducting a home energy visit, we are requesting that local partners contact program participants to determine what energy saving steps they have taken, any challenges they have faced, and any additional information they might need. These follow-up calls can play a key role in helping to encourage people to move forward.

### **RESOURCES**

- **Efficiency Vermont:** For an extensive description of efficiency improvements and resources for helping to improve energy efficiency in your home and business, see [www.encyvermont.com](http://www.encyvermont.com) or call toll-free: 1-888-921-5990. For information on Home Performance with ENERGY STAR® and how to find a certified contractor, visit [www.encyvermont.com/homeperformance](http://www.encyvermont.com/homeperformance) or call toll-free: 1-888-921-5990.
- **Vermont Energy and Climate Action Network:** For assistance in forming a local energy committee or guidance in undertaking local energy projects, contact Johanna Miller at the Vermont Natural Resources Council: 802-223-2328 or [jmiller@vnrc.org](mailto:jmiller@vnrc.org).