

# Inspire your community to button up.

An organizer's guide.

## Compendium of Community Energy Engagement Strategies

### Introduction

Vermont has seen a groundswell of individuals at the local level who are interested in helping their communities promote energy efficiency and renewable energy. Today, there are over 100 town energy committees in Vermont along with another 50 town-appointed energy coordinators. These local energy committees and energy coordinators offer great promise for helping Vermont increase energy efficiency in their homes. Despite this inspiring wave of energy action, most Vermonters have not taken undertaken comprehensive energy efficiency improvements.

In 2008, the Vermont State Legislature set a statewide goal of improving the energy efficiency of at least 20% of the state's housing stock by 2017 (about 80,000 units) and reducing annual fuel needs and bills by an average of 25% in the housing units served. Unfortunately, Vermont is falling significantly behind in this goal.

"Community-based social marketing" (CBSM) is embedded in the overall approach for the Challenge. CBSM focuses on overcoming the barriers that limit the reach of traditional marketing and educational challenges and uses community networks to encourage participation in programs of social value. This process is applied within a target community to identify the most meaningful barriers and solutions and to provide personal interaction with individuals. Town energy committees and other local groups form are in unique positions to encourage their residents to undertake comprehensive energy improvements. "Word-of-mouth" is one of the most effective ways to convince people to take action. Local groups know their community and its members, the needs of these community members, and how to reach them. We know from years of market research that community groups can be highly effective in raising awareness, increasing understanding, and motivating people to act.

This compendium was originally prepared as part of the Vermont Home Energy Challenge – a statewide challenge to engage local energy groups to encourage their residents to undertake comprehensive energy improvements on their homes.

This compendium guidance document consists of the following community energy engagement guides:

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## Creating Partnerships between Vermont Communities and Energy Contractors

### Background:

One unique and potentially powerful opportunity to promote residential efficiency improvements is for communities to partner with contractors to work in partnership.

### Potential Actions to Promote Partnerships

Contractor collaborations with community groups should be locally driven and can vary depending on the goals of the towns and contractors involved. The list below presents a number of possible opportunities:

- *Partner on local outreach efforts:* Contact contractors in your region and explore ways to work together. Contractors could join the local effort in towns where they live or volunteer to reach out to community members. Local groups could work to point interested homeowners to local contractors and generate “warm leads.”
- *Ask contractors to participate in home energy parties:* Home energy parties involve homeowners who have completed Home Performance with ENERGY STAR (HPwES) jobs invite neighbors and friends to their homes to share their experiences. Reach out to local contractors and see if someone who worked on a home retrofit ‘success story’ would be willing to speak, set up a blower door, and pass around their business cards at a home energy party.
- *Explore discounted energy audits with your local contractor:* As one option, contractors could agree to offer discounted energy audits to communities that line up 10 audits or more. In Windham County, the contractors are offering a \$50 discount for energy audits, and another \$250 discount for audits if the customer agrees to move ahead with \$2000 or more of work.
- *Ask contractors to reach out to past customers:* Contractors can reach out to past customers that have completed HPwES to encourage their neighbors to get their homes weatherized. For example, Efficiency Vermont is producing lawn signs that are intended to be placed on lawns for homes that have completed HPwES. In addition, contractors could offer “signing bonus” to their customers who give them referrals.
- *Work with contractors to follow-up with audit-only homes:* Explore a partnership or approach where contractors contact homeowners that have only had an energy audit.
- *Identify candidates for case studies:* Local groups could work with contractors to identify good candidates for developing case summaries of successful jobs in their towns, which then could be used to promote additional work. Efficiency Vermont has sent out letters to previous Home Performance with ENERGY STAR customers asking if they would be willing to share results from their weatherization results with organizers in their towns.
- *Co-Brand outreach materials:* Contractors can potentially work with local groups and/or Efficiency Vermont to co-brand marketing materials.

## Organizing a Home Energy Party

Home energy parties can be an effective way to encourage residents to improve the efficiency of their homes. Based upon the Tupperware party model, homeowners who have recently completed comprehensive energy retrofits invite their neighbors and friends to their homes to share their experiences. The energy contractor who performed the work is also invited to attend and explain the energy audit and retrofit process. A home energy party is an easy, fun way for individuals that have completed energy improvements to share their experience, tips, and knowledge with the community. By opening their homes and sharing the steps they've taken, community members can get first-hand testimonials about saving energy and money through home efficiency improvements.

### Steps in Organizing a Home Energy Party

Below are some of the key steps and options for organizing a home energy party:

1. **Identify a home that has completed comprehensive energy efficiency retrofits:** If you are unaware of individuals that have completed comprehensive energy efficiency improvements under the Home Performance with ENERGY STAR® program or VT Gas Systems program, Efficiency Vermont can help you find individual(s) in your community who might be interested in sharing their experiences and opening up their home to friends and neighbors.
2. ***Arrange for Home Performance with ENERGY STAR contractor to attend:*** After you have identified a homeowner who is willing to open up their home for a home energy party, ask a certified Home Performance with ENERGY STAR contractor come to attend. Ideally, the contractor who completed work on the home should be the one to attend the party as they will be familiar with the home and the energy improvements that were made. There is also a comfort and level of trust that comes with having the same person who did the work involved with the party. The contractor can explain what work was done, conduct a blower door test, discuss what is involved in conducting an energy audit and retrofit, and answer questions. If the contractor who performed the audit on your home isn't available, Efficiency Vermont can help you identify a contractor in your area.
3. ***Invite friends and neighbors:*** We suggest asking the individual hosting the home energy party to identify neighbors and friends to invite. In addition, you can form an "invitation committee" to put together an invitation list of friends, colleagues, and neighbors to invite. In addition, you can open up the party to the broader community. Be sure the host is comfortable with the decision to cast the invitation net far and wide. Consider holding the event on a weekday evening or weekend day, and be sure to allow for up to two hours.
4. **Arrange the agenda:** Some activities to do at the home energy party include:

- ***Start with a short presentation:*** It will be important to cover the following points during an introductory overview to attendees:
  - ***Motivation for work:*** The homeowner can share what motivated them to move forward with home efficiency improvements; e.g. drafty house, high energy bills, ice dams, comfort, etc.
  - ***Opportunities for energy savings:*** The energy contractor can review the results of the energy audit report and some of the basic energy saving opportunities that were identified.
  - ***Work completed:*** The contractor can review what work was done and any special circumstances that arose.
  - ***Results:*** The homeowner can talk about the cost and energy savings realized and any other benefits that have results from the improvements.
- ***Give a tour:*** Organize a short tour of the house so that people can see the physical work that was completed, such as spray foam in the basement or blown-in cellulose insulation in the attic.
- ***Give a demonstration of a blower door test:*** Ask the contractor to give a short demonstration of a blower door test and how it helps identify energy saving opportunities.
- ***Have an information sharing session:*** Whether it is unplugging your cell phone charger, buying a CFL, or getting a comprehensive energy retrofit, consider offering some time where attendees can share ways they are saving energy.
- ***Allow time for individual questions and answers:*** Many individuals will probably have specific questions to ask the contractor. Be sure to allow ample time at the end.
- ***Show a video:*** Efficiency Vermont has a 10-minute video that you can show at the house party, "What to Expect from Your Energy Audit and Home Improvements," that shows what is involved in professional energy audit under the Home Performance with ENERGY STAR program.

### **Tips for Organizing a Home Energy Party**

There are a number of tricks to get people out of their houses and into yours by:

- ***Fun:*** The key to successful education is entertainment. Whatever you do – don't call your event a meeting. Call it a gathering or party. Hold contests, quizzes, icebreakers.
- ***Familiarity:*** People are more likely to attend if they know the inviters. Get together with three to five other friends and put together an invitation list of friends, colleagues, and neighbors. Put the names of those doing the inviting on the invitation itself.

- **Food:** Food is always a sure winner. Schedule your event after dinner and call it an "ice cream and pie social." Or hold it on a Sunday morning and make it a potluck brunch.
- **Guarantee a new energy saving tip:** Guarantee that everyone will learn at least one new way to save energy if they attend your event. And saving energy means saving money. At the end of the event, take a poll and ask folks what the most valuable idea/tip that everyone learned. This go-round will help reinforce what folks learned at the event and what actions they plan to undertake.
- **Plan activities for children:** Many of your invitees will undoubtedly have young children. Consider having a childcare provider and some energy-related activities for children at your event. Contact the Energy Information Agency at the U.S. Department of Energy at [www.eia.doe.gov/kids/](http://www.eia.doe.gov/kids/) for ideas on energy-related activities for children.
- **Promote the Party:** Promote your house party using a combination of the tips provided above – incorporating the idea of fun, learning, door prizes, and food. Also, consider use a variety of social network tools – such as Facebook and Twitter – to help spread the word.

## Organizing a Home Energy Phone-a-thon

A home energy phone-a-thon can be an effective and easy way to reach a large number of people in a short period of time. It also provides you with a road map of what your community's current commitment to energy efficiency in their homes. This document includes:

- Steps in organizing a phone-a-thon
- Sample volunteer script -thon
- Participant Sign-up Sheet

### Steps in Organizing a Phone-a-thon

Below are some of the key steps and options for organizing a phone-a-thon:

- **Appoint a Phone-a-thon chairperson:** The Chairperson is the key organizer and cheerleader for the team and the key contact for all logistics.
- **Establish a timeline:** Set a beginning and ending date, with the phone-a-thon campaign lasting no more than two weeks. Plan to make your calls on a weekday night between
  - 6-9 pm.
- **Promote Phone-a-thon in the community in advance:** Promote the phone-a-thon in advance by notifying your local newspapers, public - access television station, or social media site such as Facebook. You can also post flyers in your community and mail out postcards in advance of the event. You may also provide a number for people to call you during the phone-a-thon.
- **Create Phone List:** There are a number of options for developing phone list for your phone-a-thon. These include:
  - Work with established lists where individuals have already expressed interest in energy efficiency.
  - Contact your Town Clerk's office who will provide you a master list of addresses.
  - Another great resource is the free website <http://neighbors.whitepages.com> which will locate your neighbor's names and contact information. The website provides an aerial map of U.S. household contact information, including first and last name, mailing address, associated household members, and phone number to help neighbors more effectively get in touch.

- **Secure a bank of telephones:** It is critical to find a location where volunteers can gather and make the calls. This “gathering” is important to create a sense of comradely during the phone-a-thon, share successful calls, and maintain the energy. In terms of having available phone lines, you might consider contacting a local business in town that has multiple lines and is willing to share their phone lines for the effort. As an alternative, if your volunteers have cell phones with unlimited minutes, then they may choose to use their own.
- **Be sure to recruit enough volunteers to get through your list.** Two hour increments are generally a reasonable amount of time for a volunteer. Plan on each call taking an average of 5-10 minutes and account for the fact that it may take several efforts to reach some residents.
- **Keep track of phone calls made**

## Preparing for the Phone-a-thon

Some tips for preparing for a phone-a-thon include:

- ***Prepare the volunteers:*** Ask volunteers show up a half hour before calling begins to practice the script and answer any questions they may have. The phone-a-thon chair should plan on listening in as volunteer make calls and offer tips and encouragement as needed. See Attachment A: Sample Script for Phone-a-thon
- **Prepare tracking system:** Establish a system for tracking your calls and responses, including who volunteers reached and their responses. Keep track of who is interested in any follow-up activity, such as a home energy visit or energy saving kit. See Attachment B: Participant Sign-Up Form
- ***Fun:*** The key to a successful phone-a-thon is motivating you’re callers. Each caller blows a bicycle horn each time they get a “yes.” Give out prizes throughout the night, post the results.
- ***Food:*** Food is always a must. Pizza, coffee and donuts are always a hit!
- **Helpful hints for making calls:**
  - Smile when you make the phone call – a positive attitude will be communicated through your tone of voice!
  - Identify yourself immediately as a member of the community.





## Attachment A: Volunteer Script for Phone-a-Thon

1. **Introductions:** Hello. My name is \_\_\_\_\_. I am calling as a volunteer with the (name of group).

- Is this (name of resident)? [confirm who it is you are talking to]

I'm calling because our town is undertaking a neighbor-to-neighbor effort to help residents lower their energy bills and improve home comfort through efficiency.

I am calling to ask you about energy efficiency improvements you have made to your home and to inform you about further opportunities to save energy and reduce your energy bills. Is this a good time to speak? This call should only take a few minutes.

2. **Home improvements to date:** Have you completed comprehensive energy efficiency improvements in your home within the last several years, including insulation and sealing up air leaks that can cause drafty homes?

Yes? (GO TO 5)

No? (GO TO 3)

**Note to Volunteers:** Comprehensive home efficiency improvements involve more than simply replacing light bulbs or installing weather stripping. They involve getting a whole house energy audit and undertaking improvements that can reduce home heat bills by 20-30% or more.

3. **Comprehensive home efficiency improvements:** The (name of your group) is reaching out to neighbors and friends to encourage you to complete comprehensive home energy efficiency improvements. The first step is to get an energy audit by a trained contractor.

4. Would you be interested in scheduling an energy audit?

Yes? (CONTINUE BELOW)

No

*If yes, we would be glad to provide you with the names of several home energy contractors in our area?*



*Note to Volunteers:* You can refer customers to the Efficiency Vermont website at [www.encyvermont.com/homeperformance](http://www.encyvermont.com/homeperformance) or your group might have a list of contractors printed out to send.

5. **Home energy visits:** if you are not interested in an energy audit at this time, we can have trained volunteers come to your home to conduct a free home energy visit to identify energy saving opportunities. The home energy visit is not an energy audit, but rather a walk-through assessment to see if your house would be a good candidate for an energy audit by a trained/certified contractor. The home energy visit lasts approximately one hour. Would you be interested in scheduling a home energy visit?

Yes? (CONTINUE BELOW)

No? (GO TO 6)

- *Are you the best person to contact for your home? If not who is?*
- *Are you available on the following dates and times? [Use "Project Teams and Assignment Form"]*
- *Participant address and directions: Please give us your address and any directions you think might be useful in getting to your house.*

6. **Questions:** Do you have any additional questions about how to improve efficiency in your home? If so, I would like to suggest that you call Efficiency Vermont's Customer Support at 1-888-921-5990 and they can provide you with all the information you need.

7. **Good-bye:** Thank you so much for your time. Have a great day

## Conducting Home Energy Visits

### 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 18% 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	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 conducting home energy visits will need liability coverage through a local organization or non-profit.

### **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.



## Organizing a Home Energy Saving (Button Up) Workshop<sup>1</sup>

### A) Overview

Efficiency Vermont is offering free workshops designed to help Vermont residents understand how their homes lose energy and how they can be made more energy efficient. Efficiency Vermont will arrange for one of its Energy Consultants to deliver a prepared slideshow (at no expense to the community) and will provide educational materials for distribution to participants. Local partners are responsible for organizing the workshop for interested residents, undertaking logistical arrangements, publicizing the program in their communities, and distributing educational materials.

### B) Workshop Format

We propose that your home energy saving workshop consist of a slideshow presentation and local speakers on energy-related topics of your choosing. These components are described in more detail below.

- **PowerPoint slide presentation:** We have prepared a 60 minute slideshow that will be delivered by a certified energy auditor who has been trained in the presentation. Please encourage your presenters to bring weatherization equipment and materials for display, e.g. a blower door, spray foam guns, and weather-stripping.
- **Local speakers:** We suggest that you consider inviting individuals with knowledge on various energy topics to give short presentations. You might also want to invite speakers and local businesses to set up display tables with information and products. Some suggestions for local speakers are described below.

Topic	Potential Speakers
Low-income weatherization assistance/fuel assistance program:	Community action agency
Wood stove safety	Local fire department
Solar hot water/electric systems	Solar installers
Weatherization materials	Local retailers
Wood pellet/cord wood stoves	Local retailers
Home weatherization retrofit	Local resident who has gone through the Home Performance with ENERGY STAR® program

#### Local homeowner that has completed home efficiency improvements:

We encourage you to invite a member of your community to the workshop who has recently completed efficiency improvements with a Home Performance with ENERGY STAR® (HPwES) contractor. HPwES is a national program from the U.S. EPA and U.S. Department of Energy and is overseen locally by Efficiency Vermont. It offers a comprehensive, whole-house approach

<sup>1</sup> This program was originally developed by Capstone Community Action in partnership with Efficiency Vermont under the “Button-Up Vermont” banner

for improving energy efficiency and comfort in your home. We encourage you to find someone who has completed a project under the HPwES program to share their experiences. We suggest that you ask the energy contractor that will be giving the presentation to contact individuals with whom they have performed a comprehensive energy retrofit to see if they might be interested in speaking about their experiences. Alternatively, Efficiency Vermont can help identify individuals in your community who might be willing to share their experiences.

### **C) Steps for Organizing a Home Energy Savings Workshop**

We suggest that you consider undertaking the following steps in organizing a home energy savings workshop in your community:

- **Workshop Presenters:** Contact Efficiency Vermont to secure a date for your workshop, and we will then arrange for a presenter to come to your community. To schedule a workshop, please contact Efficiency Vermont at 888-921-5990. We will provide you with the presenter's contact information so that you can make necessary logistical arrangements with him/her.
- **Site Logistics:** As a local workshop organizer, you are responsible for securing a meeting location, arranging food, finding audio-video equipment, and displaying educational materials. Any costs associated with site logistics will be borne by local organizers. These site logistics are described below.
  - **Meeting space:** We suggest finding a meeting room that can comfortably seat the anticipated number of participants from your community – which could range between 30 -50 people. The room should be handicap accessible, if possible. You should plan on conducting a walk-through of the space prior to the workshop to be sure the lighting and other mechanical details are in full working order. We suggest that the workshop be the only activity taking place in the room at to minimize distractions.
  - **Food:** We propose that you provide refreshments such as drinks and snacks, which can often be provided by local volunteers or through local business donations.
  - **Audio-video equipment:** You will need a laptop computer, a projection screen, and LCD projector for the workshop. Please be sure to have a relatively recent version of "Powerpoint" (a slide presentation software) on the laptop that you bring. The presenters will bring an electronic version of the presentation to use on your computer. In some cases, the presenter will be able to bring their own laptop computer and/or screen; please be sure to check with the presenter when you contact them.

You might also need some type of audio system with speakers or public address system that is appropriate for the room size – depending on the space. We strongly encourage you to test all audio-video equipment well before the start of the workshop to ensure that it is working properly. We suggest finding a community member knowledgeable in audio-visual equipment and PowerPoint to assist in your efforts.

## Home Energy Saving Workshop

### Proposed Agenda

6:45 Refreshments, Registration

7:00 Welcome and Agenda Overview (*local organizers*)

- Welcome participants
- Review agenda for the evening

7:10 Workshop Presentation (*presenter*)

- Why efficiency is important
- How your home loses heat and how to address heat loss
- Low-cost/no cost conservation and efficiency opportunities
- How an energy audit and energy improvements can help you improve the health and comfort for your home
- Action steps you can take to improve energy efficiency in your home
- Available financial and technical resources

8:10 Local Speakers Panel (*local speakers*)

8:30 Complete Evaluation Forms/Wrap-Up/Adjourn

- **Educational Resources:** Once you schedule a workshop, we will provide you with educational materials for distribution to workshop participants, including copies of the PowerPoint Presentation and information on Home Performance with ENERGY STAR. We encourage you to familiarize yourself with the materials and to refer to the materials during the introductions and closing of the workshop.
- **Registration:** We ask that you set up registration table at the entrance to the room. Please ask all workshop attendees to sign in and provide their contact information (particularly email addresses and phone numbers). This information can be valuable in case you want to follow-up with participants. Further, we ask that you provide us with this contact list so that we can undertake follow-up evaluation of participants. We suggest that you set up several tables near the entrance to display educational materials.
- **Outreach:** We encourage you to use a broad range of approaches for reaching out to residents in your community. It is important that community members hear about the workshop from a variety of sources. Publicity professionals often refer to the "Rule of Three" which states that people must hear about an event three times before it makes its way onto their calendar! We suggest using the following outreach methods, including:
  - **Personal contact:** The most effective means for getting people to a workshop or meeting is personal contact – either through phone calls, giving announcements at

other organizational meetings, or face-to-face conversations. Also, consider sending invitations to certain participants who you think might benefit greatly from the workshop.

- **Network:** We encourage you to network with other organizations in your community, such as the local Area Agency on Aging, local food shelf, conservation commission, offices of the Center for Independent Living, civic groups like Rotary and Kiwanis Club, and town officials. An effective avenue for reaching out to these groups is to attend their meetings or send them notices about the workshop and asking them to inform their members. If these groups also have a web site or e-newsletter, you can provide them with an announcement, electronic flyer, or other content for them to post and distribute within their list serves.
- **Posters:** We will provide you with a few copies of an 11" x 17" poster that announces the workshop and provides space for specific information about the date, time, and location of your workshop, along with contact information. You might also want to consider making mini- posters/flyers and placing stacks on the counters of local stores, businesses, library, post office, and other public locations.
- **Media:** We encourage you to contact both local newspapers and radio stations to publicize the workshop. We are providing you with a sample press release and calendar announcement. (See Attachment A: Sample Press Release and Calendar Listing.) Some information about placing media is provided below:
  - **Notices in community publications:** You will want to place notices about the workshop in community publications, including school newsletters, and monthly community newspapers. Be sure to ask your local paper to put an item in their calendar section. You should also consider sending your local papers a press release announcing the workshop and then following up with a reporter about doing a story. Note that deadlines vary, but deadlines can be six weeks or more in advance of the event.
  - **Radio and TV:** We encourage you to send local radio stations a calendar listing of your workshop. We also encourage you to coordinate with other towns in your region to contact radio stations about doing short interviews on energy savings and workshop times.
  - **Social Media:** Utilize a range of social media tools, including Facebook, Front Porch Forum, and Twitter.

- **Working with Local Retailers:** We suggest that you consider working with local retailers to ask them about providing weatherization materials at discounted rates. By participating, retailers can realize several benefits, including publicity, good will, and bolstering their image as a good “citizen” of the community. Materials to consider asking your local retailer to discount include: window kits, caulk and caulk guns, foam guns and cans of foam, interior storm window kits, and other weatherization materials. Retailers can offer discounts in a number of ways, including “Buy 2 – Get 1 Free,” or receiving 10-20% off of specific items. We also suggest that you encourage local retailers to attend the workshop to confirm the promotional efforts that they are offering.

Many retailers are already participating in a program to sell discounted LEDs through Efficiency Vermont. These retailers may also be interested in offering discounts on weatherization materials. For a list of participating retailers in the LED, click [here](#).

- **Door Prizes:** In addition to discounts on weatherization products described above, you might want to consider offering door prizes to workshop participants and use this as a marketing tool to encourage people to attend the workshop. For example, you can offer door prizes for items such as free caulk guns, weatherization materials, interior storm window kits, or spray foam guns. Local retailers might provide these materials at no-cost in exchange for promotion of their store. Further, if your organization has funds available, you might consider subsidizing the cost of an energy audit and offering it as one of the door prizes.
- **Workshop Evaluation Forms:** We will provide you with workshop evaluation forms to distribute to workshop participants. These evaluation forms are designed to help us understand the effectiveness of the workshop, as well as get a sense of the actions that participants plan to take following the workshop. We ask for your assistance in reminding participants to complete the evaluation form before they leave the workshop. Further, please send back the completed evaluation forms in the self-addressed, stamped envelope along with the registration list.

## Attachment A: Sample Press Release and Calendar Listing

### Sample Press Release

YOUR NAME  
YOUR  
ORGANIZATION  
YOUR PHONE

#### HOME ENERGY SAVING WORKSHOP TO BE HELD (DATE & PLACE) ORGANIZATION PRESENTS ENERGY EFFICIENCY FOR HOMEOWNERS

(Your town VT—DATE)—(ORGANIZATION) will be hosting a Home Energy Saving workshop on DATE at PLACE at TIME. This informational session is designed to help Vermonters learn the basics of building science and how to improve energy efficiency in their homes.

It includes an overview of why building efficiency is so important here in Vermont, illustrates how homes lose energy, and outlines clear steps that homeowners can take to address this energy loss. A certified energy professional is the main presenter and questions are encouraged.

Owners of homes and businesses in YOUR TOWN and the surrounding area are invited to attend the two-hour session to learn about actions they can take to lower energy bills and make their homes and businesses more comfortable and affordable.

"We're offering this workshop in TOWN because with rising heating costs, everyone needs to be thinking about ways to make their homes more efficient," said LOCAL HOST. "We hope that by sharing this information, we can help our residents be more comfortable in their homes and get more control of their heating expenses."

Home energy saving workshops are being offered in communities around the state this fall and winter.

### Sample Calendar Listing

#### HOME ENERGY SAVING WORKSHOP TO BE HELD (DATE & PLACE)

Free Home Energy Saving workshop for Vermonters who want to learn how to make their homes more energy efficient, comfortable and affordable. Presented by ORGANIZATION, certified presenter, Q&A, refreshments.

DATE: (Day & date)

PLACE: (Use street address, city, state, zip)

TIME: (Begin & end)

ORGANIZATION CONTACT: If someone has a question, who do they call or email?

WEBSITE: What is your website (make sure it is listed there!)

YOUR NAME:

YOUR ORGANIZATION:

YOUR PHONE:

## Organizing a Door-to-Door Weatherization Outreach Campaign<sup>2</sup>

### BACKGROUND AND PROJECT SUMMARY

In 2008, the Vermont legislature set a goal of achieving 25 percent energy savings in 25 percent of Vermont homes—that's about 80,000 homes—by the year 2020. To achieve this goal, Vermont needs to increase the number of homes weatherized each year by about six-fold. Studies and field experience indicate that utilizing various community-based social marketing measures to better understand public needs and promote weatherization at the local level can be effective at increasing the number of residents who participate. The premise of community-based social marketing—established through research in social psychology—is that in order to be effective, programs must be carried out at the community level and must involve direct contact with residents of a community. This approach goes beyond merely educating a community; it identifies barriers, helps residents overcome those barriers, and documents the results in order to determine the effectiveness of certain strategies.

In 2011, the Sustainable Energy Resource Group (SERG) and the [Thetford Energy Committee](#) (TEC) teamed up to form the Thetford Home Energy Action Team (HEAT) in order to test the implementation of community-based social marketing techniques for weatherization initiatives. A number of different approaches were employed to encourage home weatherization, including a door-to-door outreach and education campaign. As part of this effort, HEAT recruited and trained volunteers to help educate fellow residents on programs available to them, offer energy saving tips, swap bulbs, and conduct energy assessments to give homeowners a better idea of energy use and weatherization needs.

### The Benefits of Home Weatherization <sup>1</sup>

Vermont has the second-oldest housing stock in the nation. Consequently, many Vermont homes are improperly insulated, making them uncomfortable in the extremes of winter and summer, and expensive to heat and cool. As climate change begins to have an impact on the Northeast, Vermonters are struggling with ever-rising heating bills, and it is becoming increasingly important to find ways of saving energy at home.

Heating homes in Vermont accounts for close to 60% of residential energy use. Home weatherization reduces cold winter drafts and summer heat gain, controls moisture, provides adequate fresh-air ventilation for healthy living, and tests appliance combustion for efficiency, carbon monoxide, and adequate exhaust.

Homes weatherized through the [Home Performance with ENERGY STAR Program](#) and [Vermont's Weatherization Program](#) typically save 25 to 30 percent on heating costs, for annual savings of \$750 to \$1,000. While much more extensive "deep-energy" retrofits can achieve 75

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<sup>2</sup> Prepared by the Sustainable Energy Resource Group under contract to Efficiency Vermont

to 90 percent savings, retrofits cost more and have longer payback periods than home weatherization.

*Home weatherization is one of the most cost-effective ways to reduce energy use, save on energy spending, and increase home comfort.*

### **DEVELOPING AN ORGANIZING TEAM**

SERG formed a partnership with the TEC to develop and implement the Door-to-Door Weatherization Outreach Campaign because the TEC has a long track record of successful projects in Thetford and is well respected in the community. In addition, the TEC is knowledgeable on the issues and had worked previously with many other groups and volunteers in town.

To broaden this effort beyond the TEC, SERG contacted and set up meetings with various groups and organizations in and around Thetford—such as churches, students, neighborhood groups, the Thetford Elder Network, the Thetford American Legion post, the Boy and Girl Scouts, and former weatherization recipients—to explain the overall program, seek their input and support, and recruit volunteers to serve on the organizing committee, the Thetford Home Energy Action Team (HEAT). Beyond the intrinsic value of networking within the wider community, building relationships with other constituency groups made it easier for people outside the already-committed circle to be open to participating in, and spreading information about, the program -- even if members of these groups were not able to commit to volunteering to assist directly in furthering the program's weatherization aims.

SERG sought to recruit individuals who could effectively share information with their groups because of their existing ties and trust among their members. SERG also sought out individuals who might be able to contribute certain skills to the team and share some responsibilities. Some of the skills needed included:

- Strategic planning
- Volunteer recruitment and training
- Communications, media, and publicity
- Data collection and entry

### **SETTING PROGRAM GOALS**

The goals for increasing home weatherization in Thetford were designed to match the Vermont legislature's climate-change goal of reducing energy use by 25 percent in 25 percent of Vermont homes by 2020.

Steps to setting home weatherization goals in Thetford:

- Thetford Town Listers were asked to provide the number of homes in town; this figure was divided by four to determine the number of homes needing to be weatherized by 2020.



- Efficiency Vermont's Home Performance with ENERGY STAR program and the community action agency (Capstone Community Action -- which runs the weatherization assistance program covering Thetford) were asked to provide the number of homes in town that had already been weatherized.
- The number of already-weatherized homes (#2) was subtracted from the number of homes needing to be weatherized (#1) to establish the number of additional homes that need to be weatherized.
- The number of additional homes needing to be weatherized (#3) was divided by the number of years until 2020 to determine the number of homes per year needing weatherization, in order to meet the statewide climate-change goal.

Through these steps, it was determined that the number of homes to be weatherized every year until 2020 in Thetford needed to triple, from 12 to 36.

#### **DEVELOPING AN OUTREACH PLAN**

In developing an outreach plan, SERG applied community-based social marketing approaches that included reaching out to all Thetford homeowners individually, as much as possible, to explain the benefits of weatherization; developing and using success stories of other Thetford residents who had participated in these programs; and giving homeowners firsthand opportunities to meet and talk with professional service providers, those providing financing and incentives, and homeowners who had gone through the process.

**Door-to-Door Outreach Campaign** – Educational and promotional-material kits were developed (these included case studies of local homes that had been weatherized) for distribution to every home in town, and volunteers were recruited and trained to use these kits to inform local residents about the benefits of home weatherization and the resources available to them. (*NOTE: In communities where volunteer resources are limited, an alternative would be to conduct targeted outreach to friends and neighbors of individuals whose homes have already been weatherized.*)

**Home Energy Expo** – Homeowners were able to attend workshops, see demonstrations of weatherization measures and materials, and talk with professional service providers, those providing financing and incentives, and homeowners who had already implemented weatherization measures in their homes.

**Weatherization "Skillshop"** – A day-long, in-depth, hands-on workshop was organized for homeowners interested in learning how to make some home energy improvements themselves.

**Home Weatherization Tour** – Open houses were held at two local homes that had been weatherized, allowing people to tour the homes and talk with the homeowners about their experiences.

### **AN EFFECTIVE PROGRAM MESSAGE**

The main message should be simple, using just a few words that address issues that are important to everyone in the target audience.

**General “Messaging” to the Entire Community** – Research has determined that the issues around home weatherization that appeal to everyone include:

- Saving energy
- Saving money
- Increasing home comfort

**Targeted “Messaging” to Specific Homeowners or Audiences** – Of course, there are many other benefits from home weatherization that may appeal to certain groups or individuals, and it may be helpful to discuss these as appropriate:

- Reducing carbon emissions, slow climate change, protect the environment
- Increasing energy security, reducing reliance on foreign fuels
- Creating local jobs and strengthening the local economy

### **AN EFFECTIVE PROGRAM IMAGE**

It is helpful to develop an easily identifiable name and logo for “visual branding” that everyone can understand and connect with at a glance. With permission, Thetford HEAT borrowed and customized the Upper Valley Home Energy Action Team’s<sup>12</sup> name and logo because they conveyed the desired message to homeowners in a short, catchy way. The name and logo were used on stationery, posters, T-shirts, tote bags, and handouts, making it easy to identify these elements as part of the Thetford HEAT program.

The Thetford HEAT logo is available from SERG for customized use by other groups.



### **BUILDING COMMUNITY AWARENESS, SUPPORT, AND PARTICIPATION**

Most people are more likely to know and trust others from their own town, rather than people from outside the community, who promote participation in a program. Therefore,



one of the strategies employed in the Thetford Door-to-Door Weatherization Outreach Campaign was to use successful weatherization projects in town to help inform other homeowners about the program and encourage their participation.

**Identifying Successful Weatherization Projects** – SERG contacted Efficiency Vermont and several Home Performance with ENERGY STAR contractors who do business in the local area to ask them if they would be willing to contact homeowners who were pleased with, and achieved good savings from, their weatherization work and to solicit their help in promoting home weatherization work in town. A list of Home Performance contractors can be found [here](#). The goal was to identify homeowners who were well known in the local area, who achieved measurable savings from their weatherization work, and who could serve as good spokespeople. Six families interested in helping were initially identified, and ultimately two families were selected who met all of the most important criteria.

**Developing Brief Case Studies and Case Summaries** – SERG worked with the two families to develop the Biddle Family and Toth Family case studies that documented their experience with the weatherization project. The case studies included details about problems the homeowners had experienced before the weatherization work; the weatherization measures installed; the costs of improvements; any financial incentives; the projected or actual energy and dollar savings; the calculated savings from improvements over time (for return on investment); homeowner testimonials; and photos of the home and the owners. Following the project SERG helped develop 10 case study summaries of other homeowners who made improvements through the Home Performance program. (NOTE: Most of the information for these case studies and summaries can be gathered from the “HERO” report that is generated by a Home Performance with ENERGY STAR contractor and submitted to Efficiency Vermont, and by a simple interview with homeowners.) Efficiency Vermont may be able to help identify homeowners who have participated in the Home Performance with ENERGY STAR program and who are willing to participate in promoting a local home weatherization project. For more information, contact Efficiency Vermont at 1-888-921-5990.

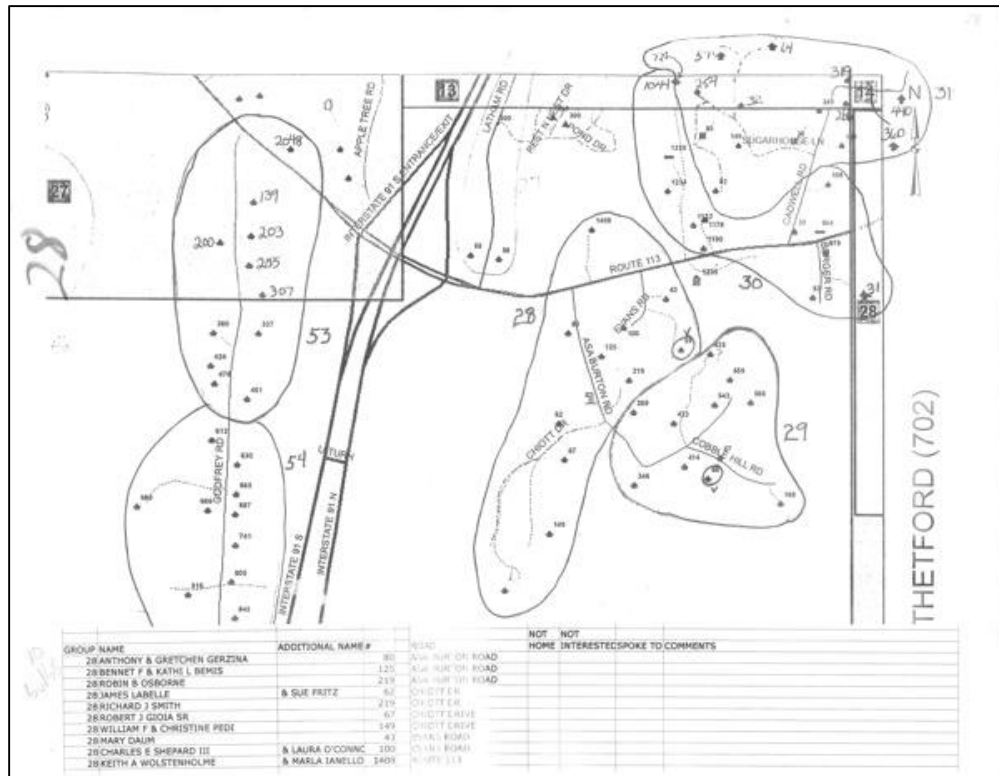
**Informing the Community** – Every year-round home in Thetford was targeted through a door-to-door outreach campaign. While this was an ambitious goal (Town Listers estimated there were 1,100 year-round residential names and addresses), the TEC felt that the notoriety of an effort to reach every home in town would in itself create a “buzz” that would bring added attention to and support for the program.

A variety of free and low-cost media were used to inform the community about the home weatherization program. A Program Introductory Letter to Homeowners was mailed to every home; program posters were hung throughout the town; several notices were posted to the town list serve; letters and a great article were published in the daily newspaper serving the town; and a notice was placed in the town newsletter.

## **DOOR-TO-DOOR OUTREACH STRATEGIES**

The strategy to go door-to-door to every home included several steps.

1. **Identifying Homes** – The Town Listers provided a spreadsheet listing the 911 street addresses and names of all homeowners in town and maps of the town showing all the roads and locations of the 911 street addresses. After looking at the placement of homes on the map and thinking about how long each home visit might take, the list was broken down into batches of 10 homes in relatively close proximity to one another. This turned out to be a good number, as average visits, including “no-shows” and travel between, took about 30 minutes per home. Each batch of 10 homes was assigned a number, and a circle was drawn on a large map of the whole town showing where each numbered group of 10 homes was located. (NOTE: In addition to home address, some Town Listers may be able to provide information on what type of heating fuel each home uses—this is very helpful.)
2. **Providing Notice to Homeowners** – Before any home visits took place, a Program



Introductory Letter was sent to all homeowners notifying them that volunteers would be coming to their door. The purpose of the letter was to:

- Inform homeowners about the program and advise them of intended visits so they would not be surprised by strangers at their door.
- Present the Thetford HEAT logo and explain that volunteers associated with the program would wear shirts with the logo on it, so homeowners would be able to recognize visitors as HEAT volunteers.

- Allow homeowners to “opt-out” of visits or to contact the team to schedule alternative dates if they were not going to be home.
  - Encourage homeowners to gather fuel-use data and be prepared by knowing the dimensions of the heated area of their home, so volunteers could help them compute relative energy efficiency calculations during the visit.
3. **Pilot Outreach in North Thetford** – A trial run of the door-to-door outreach process was conducted in one of Thetford’s five villages, consisting of about 100 homes, before taking on the whole town, in order to evaluate the effectiveness of the outreach and to identify aspects of the plan that could be changed as needed to improve the process.
- **Cold Calls** – When they visited, the volunteers found that many homeowners were not at home. In those cases, they hung a plastic shopping bag on the door, containing all the written materials being distributed, along with a “Sorry-We-Missed-You”<sup>24</sup> notice clipped to the outside. Volunteers also attached a handwritten note to the notice with their names, phone numbers, and an offer of a return visit to explain the program, install a free energy-saving CFL (provided by Efficiency Vermont), and help homeowners fill out a Home Energy Efficiency Calculator and Home Weatherization Survey in order to qualify for a free home-energy-audit drawing.
  - **Scheduled Visits** – A few volunteers who were canvassing in their own neighborhoods and knew the homeowners they were visiting called ahead to schedule a time when they would be there for the visit. This process resulted in a much higher percentage of homeowners filling out the surveys and talking with the volunteers.

*(NOTE: To avoid missed visits, volunteers could look up in a town phone book the phone numbers of homes they plan to visit and call ahead to schedule visits. Day and time of visit is important. Visits on Saturday mornings found many homes empty, but Sunday afternoons proved to be a more likely time to find people at home.)*

## **RECRUITING AND TRAINING VOLUNTEERS**

**Number of Volunteers** –SERG determined that an estimated 100 volunteers would be needed to contact owners of Thetford’s 1,100 homes personally. The TEC had recruited more than 50 volunteers for a previous project and it seemed possible that, with concerted effort, 100 volunteers could be recruited for this project. As it turned out, however, due to many people being involved with Tropical Storm Irene cleanup or working on a state cross-country race that was held in Thetford at the same time, only about 50 volunteers were recruited. Consequently, only 650 of the town’s 1,100 homes were reached in the time allotted. Information on the program was mailed to the remaining homes in town.

Setting a goal of reaching every home in town was a huge undertaking; this might work better in other towns where there is a stronger volunteer base. (NOTE: If volunteer and time resources are limited, a targeted outreach effort in neighborhoods around where successful weatherization jobs have already been completed could be effective. This tactic might include inviting neighbors and friends to open home tours of successful jobs. Similarly, the "time- frame" for covering the entire town could be extended over a period of three or four years, with manageable groups of neighborhoods targeted in each year.)

**Recruiting Volunteers** – It is very important to recruit a large number of volunteers who represent as wide a cross-section of town residents as possible so they can share information about the project with all of the local groups, committees, and neighborhoods with which they are affiliated. To that end, SERG visited numerous town, neighborhood, church, civic, and student groups to explain the program and recruit volunteers; circulated volunteer recruitment notices via email and the town listserv; posted fliers around town; published announcements in the town newsletter; and solicited individual homeowners who had already implemented weatherization measures, as well as volunteers who had participated in previous TEC projects.

**Volunteer Training and Role Playing** – All volunteers were required to participate in a two-hour training session to familiarize them with the materials they would be sharing, and to make sure that everyone was clear and consistent in their "messaging." The training also emphasized the importance of being upbeat and friendly in interactions with homeowners, and of trying to build some kind of connection with them through common interests. These might include roles they fill in community activities, being part of the Thetford Home Energy Action Team, or where they live.

*Thetford HEAT volunteers discuss outreach materials and strategies.*

The training session included a review of all of the materials, as well as a role-playing exercise, first by organizers as a demonstration, and then by the volunteers. Following their training, volunteers were asked to complete a practice presentation at home with friends and family so they could get comfortable with the presentation and materials.

The materials to be distributed by volunteers included more information than any homeowner could be expected to absorb during an introductory visit (see list and links to handouts in Appendix). Therefore, volunteers were instructed to present a brief overview and summary of the key points of the program, and to emphasize that contact information for Thetford HEAT was provided in the materials and homeowners were welcome to contact HEAT with any questions they might have. The goals of the visit were to build a sense of comfort and trust in Thetford HEAT, to cultivate a willingness to let Thetford HEAT help homeowners understand and navigate the weatherization process, and to emphasize to homeowners that Thetford HEAT stood ready, willing, and able to help them every step of the way. Throughout the visits, the theme of the presentation was on the main message: that home weatherization would help residents *Save Energy, Save Money, and Increase Home Comfort*—themes that everyone can relate to.

**Volunteer Teams** – Initially, all volunteers were asked to go out in teams of two, so they could support each other in their first presentations. Many found this very helpful, as one volunteer might remember something the other forgot to mention. It also worked well that one volunteer could help install the CFL and fill out information on the Home Weatherization Survey as the visit progressed, while the other focused on making the presentation to the homeowner.

After volunteers gained some experience with home visits, they were allowed to go out alone if they felt comfortable doing so—and since volunteers were in short supply, this made it possible to reach more homes. The exception was that any volunteer under the age of 18 was required to be accompanied by an adult at all visits.

### **SCHEDULING OUTREACH DAYS**

The volunteers were polled on-line to figure out which days they could canvas and weekends proved best for most volunteers. There were 50 volunteers to reach 1,000 homes and from the trial outreach in North Thetford, it seemed the average visit, including travel between homes took about half an hour. So the door-to-door outreach was scheduled on Saturday and Sunday over two weekends. This would have been enough time had there been a strong turnout at each day, but there was a falling-off over the second weekend and we were unable to reach all 1,000 homes.

### **SHOWTIME: LOGISTICS FOR OUTREACH DAYS**

A central staging area was chosen in the part of town to be visited on that day. Volunteers gathered at the staging area in the morning to pick up home assignments and materials and to receive last-minute instructions.

**Assigning Homes** – When volunteers arrived at the staging area, they were asked to look at the map and choose which batches of 10 homes they wanted to visit. They were encouraged to select homes of people they knew, so homeowners would be more open and receptive to their visits.

Volunteers signed their names on a master list next to the group number of the homes they had chosen, and they put a check mark on the circle of homes on the composite map. This allowed program organizers and other volunteers to see easily which houses had not yet been assigned and to identify which volunteers were going to which homes, in case any follow-up was needed or any problems developed. Setting up this system was a time-consuming task, but it was very helpful for the volunteers and the program organizers.

**Material Distribution** – Volunteers then picked up a cloth tote bag that had been imprinted with the project logo and stuffed with enough materials for 10 home visits.

Each tote bag had the following paperwork clipped to it:

- Number corresponding to the group of 10 homes claimed by the volunteer.
- Small sectional map of where the homes were located with a list of who lived in the homes, with 911 street addresses and boxes to record what happened at each visit.
- Checklist of all the materials they should have and procedures they should follow upon returning materials and forms to the staging area.

**Last-Minute Instructions** – Once volunteers were equipped with their visit assignments and tote bags, a meeting of the group was held to touch on last-minute points to keep in mind throughout the day. Topics covered in this meeting included:

- Review of the materials and the main messages that were to be shared
- Warning about not putting themselves in dangerous situations; e.g., staying away if there were loose dogs or if anything seemed uncomfortable
- Discussion about how everyone was feeling
- Sharing and talking through any concerns—mostly nervousness about knocking on strangers' doors
- Reminder to keep presentations friendly and upbeat—and to have FUN!

Before volunteers went out, a group photo was taken for use in telling the story later. This whole morning process was great for team building, and for getting everyone excited about and more comfortable with their visits. Volunteers then went out to distribute the materials and talk with homeowners.

**Material Distribution** – Volunteers reviewed materials in the packet with homeowners. Particular attention was placed on the weatherization resources handout listing programs that provide home assessment and improvement services and the Thetford HEAT Programs offering residents opportunities to learn more about the weatherization service providers and their offerings. A description of and links to all materials distributed can be found in the appendix.

**Gathering Data and Filling Out Forms** – The packet of information carried by volunteers included a Home Weatherization Survey to gather the homeowner's name and contact information, size of home and amount of heating fuel used. This information allowed volunteers to help the homeowner calculate the number of BTUs per square foot of heated area used in the home, which provides a rough idea of how efficiently the home is heating. (BTUs are British Thermal Units, a measure of heat.)

Everyone who shared his or her home energy-use information was entered into a drawing for a free home energy assessment. Homeowners who were not home during volunteer visits or who received their information in the mail were encouraged to fill out and mail in the Home Weatherization Survey information. In total, survey information was collected from 240 Thetford homeowners.



**Material Returns and Results** – The staging area was open throughout the day for volunteers to drop off leftover materials and completed homeowner surveys, to pick up additional bags of materials to distribute, and upon completion of the visits, to fill out volunteer surveys providing feedback on how the program had gone and offering any suggestions for improvements to the process. Coffee, juice, pastries, cheese, and fruit were available for volunteers throughout the day.

As volunteers returned to the staging area after completing their assignments, even those who had expressed nervousness about meeting with unknown homeowners were very excited and upbeat about their experiences. They hung around the staging area and compared notes, sharing results, tips, and suggestions for improvements, and filled out volunteer surveys.

Ultimately, over the course of five days, 50 volunteers visited and distributed information packets to 650 of Thetford's 1,100 homes (60 percent of the town's homes). Some of the materials that were distributed promoted other related Thetford HEAT weatherization events, such as the Home Energy Expo, Weatherization Skillshop, and Home Weatherization Tour, that were going to happen soon, so it was decided that the materials for the remaining 350 homes would be mailed with a cover letter rather than being delivered in person in order to give homeowners enough lead-time to plan to attend these events.

### **TRACKING RESULTS, NEXT STEPS**

The Thetford Energy Committee entered all of the Home Weatherization Survey information gathered by volunteers into a database. SERG and the TEC plan to contact homeowners in the database to see what home energy improvements have been installed and what their energy use is in each of the next three years, with results entered into the database. In addition, participants will be asked what measures have been effective in persuading them to take action, to get an idea of how better to reach other homeowners in town. Finally, participants in the database will be notified about energy-saving information and opportunities over that period.

### **CAPTURING AND TELLING YOUR COMMUNITY'S STORY**

The 2011 Thetford Door-to-Door Weatherization Outreach Campaign can be replicated (with adaptations as needed) by other communities throughout Vermont in order to increase the number of weatherized homes in the state and help residents *Save Energy, Save Money, and Increase Home Comfort*.

As you are developing and implementing a home weatherization project in your community, you can reach out and influence many more homeowners both within and outside your community by keeping the following tips in mind:

- Chronicle every step of your project by recording results, taking photos, and gathering quotes from participants as you go.

- Contact your local newspaper to see if it is willing to cover your event and write an article.
- Write your own stories and follow-up case studies, and make sure you share your stories with [Vermont Energy & Climate Action Network](#) and Green Energy Times.
- Submit an article to your town newsletter and listserv.
- See if you can get local public access television to produce and air a story on your project.
- Post your own project videos on YouTube.
- Most important, remember to stay positive and have fun!



## 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). [www.vecan.net](http://www.vecan.net)

**[HEAT Squad of NeighborWorks of Western Vermont](#)** – 110 Marble Street, West Rutland, VT 05777, [info@nwwvt.org](mailto:info@nwwvt.org), (802) 438-2303 – A federally funded program in Rutland County that assists homeowners in getting their homes weatherized, NeighborWorks provides handholding and guidance to help homeowners through the weatherization process, and helps homeowners schedule home energy audits, review and explain audit reports, develop a work plan, and consider financing options.

**Vermont Weatherization Assistance Program** – administered by Vermont Office of Economic Opportunity. Provides free home energy audits and improvements to income-qualified Vermonters through the residents' local Community Action Program. Website can be found [here](#).

**New England Grassroots Environment Fund (NEGEF)**, (802) 223-4622 – Provides small grants (typically \$500 to \$2,500) to energize and nurture long-term civic engagement in local initiatives that create and maintain healthy, just, safe, and environmentally sustainable communities. [www.grassrootsfund.org](http://www.grassrootsfund.org)

**[Vermont Community Foundation](#)** – VCF has several funding opportunities, including their Small and Inspiring Grants, which provide \$500 to \$2,500 for local projects. Website can be found [here](#).