HRV Post Implementation Evaluation

HRV Post Implementation Evacuation takeCHARGE (Redacted Version)

NEWFOUNDLAND POWER
A FORTIS COMPANY

Contents

1.0 Introduction

1.1 Evaluation Objective

The objective of this evaluation is to determine how to increase program participation and program effectiveness in the HRV Rebate Program.

The information gathered through this evaluation should provide insight into the market trends, incremental costs, program awareness, program delivery and appropriate incentives.

This evaluation focuses on:

- Indentify program barriers
- Comparing program design to program implementation.
- Understanding the HRV purchasing and decision making process

The activities to complete this evaluation were:

- Reviewing data about participants and non participants
- Interviews about market trends with installers and customers
- Review of other utility programs where partners such as installers and distributors are a large part of the program design

This evaluation includes data from the launch of the program (September 15, 2013) to the evaluation start date (February 24, 2014).

1.2 The HRV Program Design

On September 15, 2013 *takeCHARGE* launched its new Heat Recovery Ventilator ("HRV") Program. This program encourages customers to purchase a high efficiency HRV to improve the efficiency of their home. HRVs have been widely used in new home construction in the province since the 1990s, to control humidity and air quality. Eligible measures in this program include all HRV models that have a Sensible Recovery Efficiency of 70% or more. Customers who purchase a high efficiency HRV can receive a rebate of $175. All customers are eligible for this program regardless of age of home or heat source.

The HRV Program was originally designed to include:

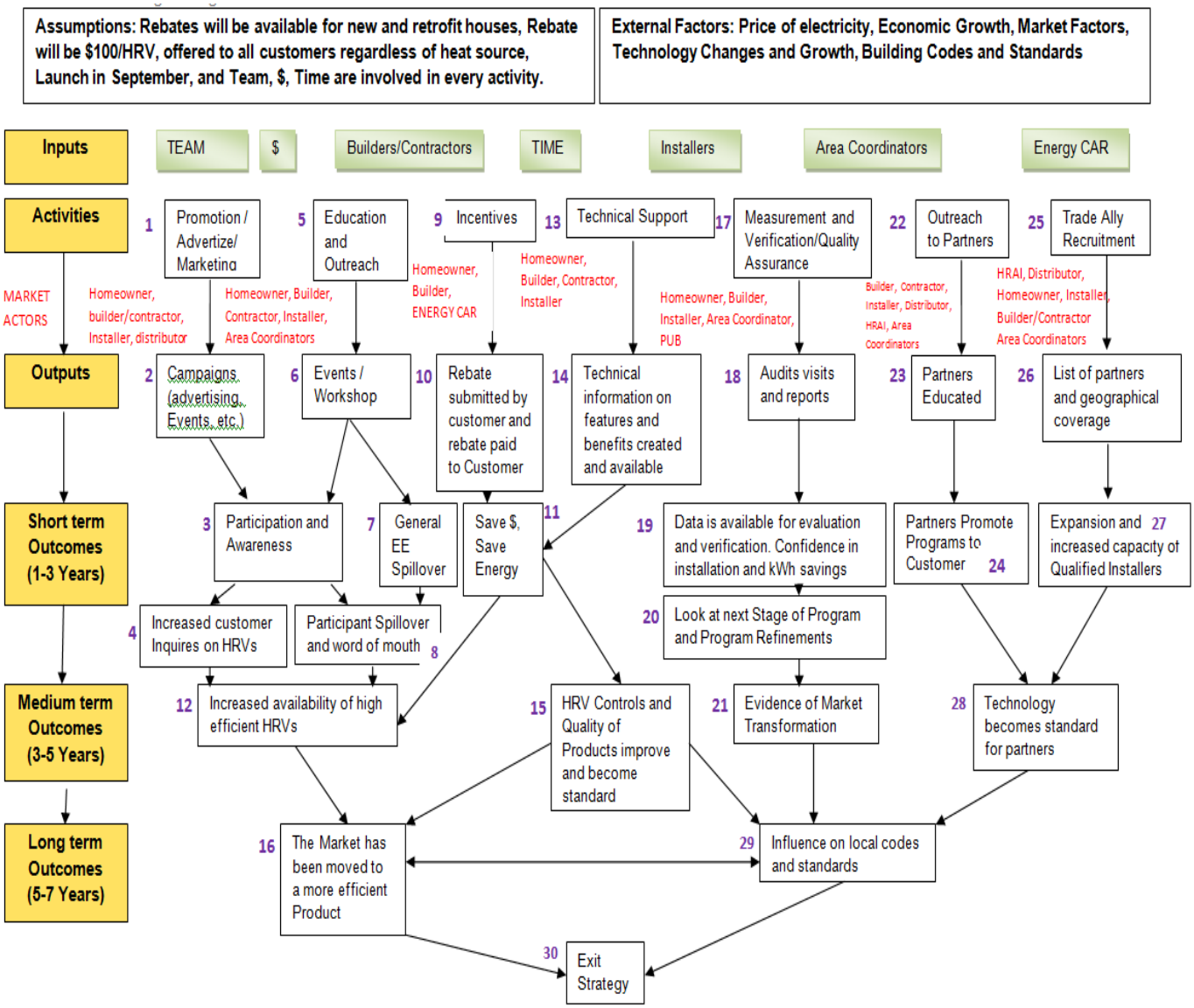
- A strong partnership with installers
- Outreach installer events across the island occurring multiple times a year
- An educational component for home owners
- Full advertising and marketing campaigns to promote the program
- Providing $175 incentive to home owners

The participation, incentives, administration costs, and energy savings targets for 2013 and 2014 are:

HRV Program Plan	2013	2014
Participants	263	824
Incentives ($000's)	46	144
HRV Program Administration Costs ($000's)	98	127
Energy Savings (MWh)	151	473

1.3 Program Logic Model

Below is the HRV Program logic model that illustrates how the program was designed to operate.[1]



2.0 Comparing Program Design to Program Implementation

This section compares the 5 year plan budget for the HRV program as well as the HRV program logic model to how the program has been implemented.

2.1 Program Design compared to Program Implementation

What has been implemented from the program design?

[1] A Program Logic Model illustrates what the program is supposed to do, with whom, and why. It is the blueprint of a program. A logic model is a way to describe a program pictorially or schematically. It helps identify key performance indicators and critical questions for evaluation.

- Installer program launch events across the island
- Marketing campaigns
- Installer communication
- Internal employee training and awareness
- Rebate Processing
- Website creation

What has not been implemented from the program design?

- The program was to include sales materials (worksheet, financing forms, etc.)
    - This was postponed due to cost constraints.
- POP materials were to be created.
    - This was postponed due to cost constraints.
- The program was originally created to include installer web videos.
    - This was postponed due to cost constraints.
- Two installer events per area per year were included in the design.
    - This was postponed due to cost constraints.
- Technical information on features and benefits created and available.
    - No educational or features information has yet been created.
- Outreach to educate partners.
    - Outreach to partners could be increased.
- Contractor training and development.
    - This was postponed due to cost constraints.
- List of partners and geographical coverage.
    - This list has been created for installers, not other partners.

Recommendations

- To update program to include all design elements that remained in the budget and not postponed due to program budget constraints. This would include creating educational information about HRV features and benefits, complete audit field visits to get customer feedback regularly and increase program outreach and training to partners.

2.2 Program Targets Compared to Actual and Year to Date Achievements

The participation, incentives, administration costs, and energy savings targets and actual for 2013 and year to date for 2014 are:

HRV Program Plan	2013(F)	2013(A)	% Difference	2014(F)	2014(YTD)	% Difference
Participants	263	29	-89%	824	33	-96%
Incentives ($000's)	46	5	-89%	144	6	-96%
Energy Savings (MWh)	151	17	-89%	473	19	-96%

Observations

- 2013 and 2014 participation, incentives and energy savings are much less than planned but so is the amount of administration costs spent to implement the program.

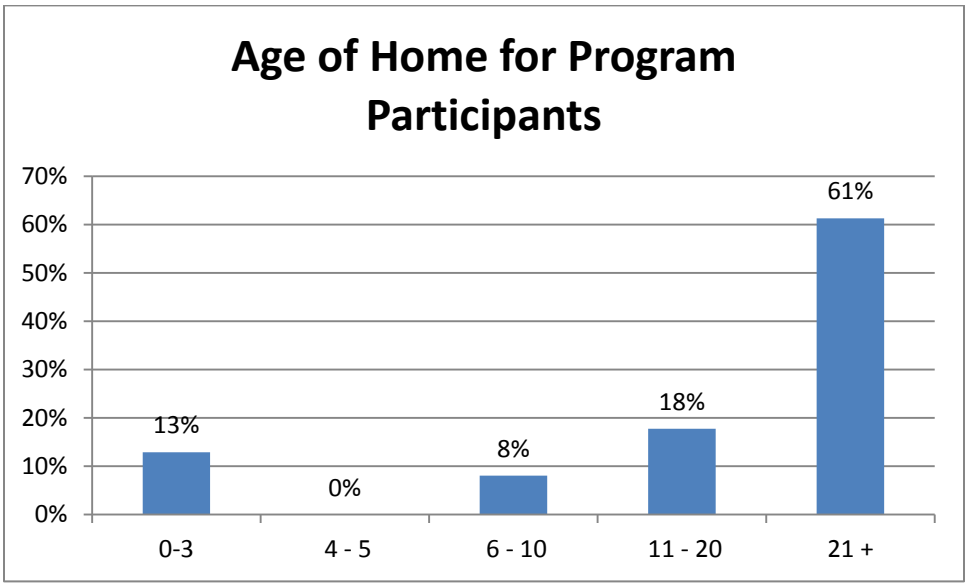
Recommendations

- Increase administration efforts for program. This may increase participation, incentives and energy savings within the program.
- Consider adjusting program targets for 2014.

3.0 Program Participants vs. Non- Participants

3.1 Program Participants

3.1.1 Program Participants by Age of Home



Observations

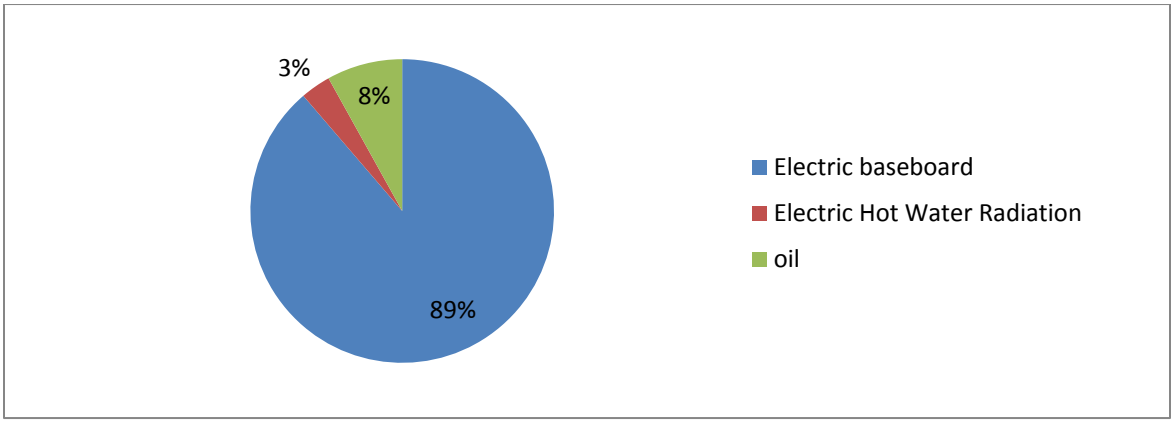
- Majority of participant homes installing high efficiency HRVS are 21 years and older. This is reasonable because of the technologies life is estimated to be 15 to 20 years.

- Customers in older homes may have more experience with an inefficient HRV and understand the importance of a quality high efficiency HRV
- Only 13% of homes built in the last 3 years are installing eligible HRVs.

Recommendations

- Should target contractors, especially contractors that we know are building high efficiency houses.
- Follow through with the direct mail advertising to the subdivisions that were built 20 plus years ago. Possibly include subdivisions built 15 years ago.

3.1.2 Participant Heat Source



Observations

- Very few oil heated customers have participated in this program.

Recommendations

- Continue to target electrically heated homes.

3.1.3 Rural Vs. Urban Markets

Area Office	Quantity	% of Total
10	**60**	82%
BAULINE	1	
CHAMBERLAINS	3	
FLATROCK	2	
GOULDS	1	
HOLYROOD	2	
KELLIGREWS	1	
MOUNT PEARL	8	
PARADISE	6	
PORTUGAL COVE	2	
SEAL COVE CBAY	1	
ST. JOHN'S	27	
ST. PHILIPS	1	

TOPSAIL	3	
TORBAY	2	
20	**6**	8%
BRISTOL'S HOPE	1	
CARBONEAR	2	
DUNVILLE	1	
UPPER ISLAND CV	1	
VICTORIA	1	
30	**1**	1%
CLARENVILLE	1	
31	**1**	1%
ST. LAWRENCE	1	
40	**2**	3%
GRAND FALLS-WINDSOR	2	
41	**2**	3%
GAMBO	1	
GANDER	1	
50	**1**	1%
IRISHTOWN	1	
Total	**73**	

Observations

- The majority of units that have been rebated are in the St. John's CMA (82%) and the majority within that area is in the city of St. John's (45%).

Recommendation

- Need to increase promotion of this program in the rest of the province

3.1.4 Contractor Participation

Observations

- No contractors have participated

Recommendations

- Need to focus on educating contractors about the program.
- Should use the St. John's ERS to promote the HRV rebate program to contractors.

3.1.5 What Models Are Being Rebated?

Model	Quantity	% of Total
[redacted]	**6**	8%
[redacted]	6	
[redacted]	**5**	7%
[redacted]	1	
[redacted]	1	
[redacted]	3	
[redacted]	**12**	17%
[redacted]	7	
[redacted]	2	
[redacted]	3	
[redacted]	**1**	1%
[redacted]	1	
[redacted]	**14**	19%
[redacted]	4	
[redacted]	2	
[redacted]	8	
[redacted]	**34**	47%
[redacted]	5	
[redacted]	28	
[redacted]	1	
Total	**72**	**100%**

Observations

- The majority of units that are being rebated are [redacted]. The following two units are the [redacted] and the [redacted].

Recommendations

- Work with the manufacturers that have less participation, especially [redacted] and [redacted], to increase their participation in the program.

3.1.6 Assessing the Impact of the City Of St. John's Energy Reduction Strategy

Observations

- The St. John's Energy Reduction Strategy has had no impact because no contractors or new homes have participated.

Recommendations

- *takeCHARGE* should start using their relationships with contractors to try and influence their decision making.
- The ERS already requires builders in the city to install HRV units that have 65% efficiency. Need to educate contractors about how they can increase this to 70% and use it as a selling tool.

3.2 Program Non Participants

3.2.1 Number of Rebates That Didn't Qualify & Why

HRV Applications Rejected		
Rejections		
52% Rejection Rate		
Reasons:	**#**	**%**
Unit does not meet eligibility requirements	67	85%
Unit purchased prior to Sept 15, 2013	2	3%
Required Information not provided	7	9%
Installer not HRAI certified	3	4%
Total	**79**	100%

Observations

- The rejection rate is very high for this program. This can be expected in a new program that has technical eligibility criteria.
- The majority of rejections were because the unit does not meet eligibility criteria. This could indicate that there is some confusion about what units are eligible or that installers and/or participants are not referencing the list when purchasing their units.

Recommendations

- More work needs to be done to educate homeowners and installers about the eligibility requirements.
- The eligibility requirements should be made clear to the participant and installer whenever they are visiting the website or inquiring about the program.

3.2.2 Customer Interviews

21 customers were interviewed. Eleven had applications that were approved and 10 were rejected.

1. Was this a new or replacement HRV?
   57% of customers surveyed were replacing a HRV, 43% were installing a HRV for the first time (4 of those were for new homes and they were all rejected).

2. For a replacement: How old was the unit that was replaced? Do you know the model that you replaced?

% of Customers Responded	Responses
42%	20 years and older
25%	15-20
33%	10-15

3. What was your motivation for installing a new HRV?

% of Customers Responded	Responses
52%	Old model not working
33%	Too much condensation in home
10%	Energy Efficiency
5%	Better Air Quality

4. How did you find out about the program?

% of Customers Responded	Various Responses
24%	Installer recommendation
19%	Bill insert
19%	TV
19%	Word of mouth
5%	Newspaper
5%	VOCM website
5%	Work
5%	Radio

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5. How did you decide to install a high efficiency HRV?

% of Customers Responded	Various Responses
67%	More efficient
24%	Installer recommendation
19%	Rebate was a good incentive to upgrade
10%	Reduce Power Bill

6. What you think the barriers would be for a customer to participate?

% of Customers Responded	Various Responses
76%	None
14%	Installer list was too large/website unclear
5%	Cost
5%	Installer was unaware

7. Was your experience participating in the program positive?
   All that were approved said yes. All that were rejected said no.

8. Did you visit the website to ensure the HRV was eligible?

Those that were approved:

- 73% said yes

Those that were rejected:

- 30% said yes

Customers that had applications rejected:

9. Did installer make a recommendation to you on the basis that it was eligible for the program?
   6 out of the 10 customers said yes.

Observations

- The majority of customers are finding out about the program through installers, followed by bill inserts, TV and word of mouth
- The majority of customers are choosing a high efficiency HRV because it is more efficient
- The majority of customers do not see any barriers to participating in the program. The most citied barrier was difficulty with the website. Customers feel the installer list is too long and the eligibility is unclear. Installers believed that cost was the biggest customer barrier to customer participation, but this is not what is being stated by the customers.
- The majority of the customers that were approved for the rebate checked the website to verify that the HRV was eligible.

Recommendation

- The website needs to be improved to become more user-friendly. The list of eligible units should be shortened to only include units available in the marketplace. Also, the installer list should be shortened to include only residential installers that are interested in promoting our program.

4.0 Trade Allies

4.1 What Manufacturers Do Installers Represent?

Installers	# of Installers by Manufacturer							
	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	**Grand Total**
[redacted]	-	-	-	-	-	-	1	**1**
[redacted]	-	-	4	-	-	-	-	**4**
[redacted]	-	-	-	-	-	-	1	**1**
[redacted]	-	-	-	-	-	-	1	**1**
[redacted]	-	-	-	-	-	-	2	**2**
[redacted]	-	-	-	3	-	-	-	**3**
[redacted]	-	-	-	-	-	-	2	**2**
[redacted]	-	-	-	-	-	1	-	**1**
[redacted]	3	2	-	-	-	-	-	**5**
[redacted]	-	-	-	1	-	-	-	**1**
[redacted]	-	-	1	-	-	-	-	**1**
[redacted]	-	-	-	1	-	3	-	**4**
[redacted]	-	-	-	-	-	-	1	**1**
[redacted]	-	-	-	-	-	-	1	**1**
[redacted]	-	-	-	1	-	8	14	**23**
[redacted]	-	-	-	-	-	-	7	**7**
[redacted]	-	-	-	-	1	-	-	**1**

[redacted]	-	-	-	-	-	-	3	**3**
[redacted]	-	-	-	-	-	-	2	**2**
[redacted]	-	-	-	1	-	-	-	**1**
[redacted]	-	-	-	1	-	1	-	**2**
[redacted]	-	-	-	-	-	-	1	**1**
[redacted]	1	-	-	-	-	-	-	**1**
[redacted]	-	-	-	-	-	-	2	**2**
[redacted]	-	-	-	-	-	-	-	**1**
Grand Total	**4**	**2**	**5**	**9**	**1**	**13**	**38**	**72**

Observations

- The installer that has participated the most is [redacted] with 23 units, followed by [redacted] with 7. Both installers install [redacted] units although [redacted] also installs [redacted] and [redacted] as well.
- [redacted] units are the HRVs that are most commonly installed, 53%, followed by [redacted] with 18%

Recommendations

- Increase outreach to installers that have participated. Offer ways to partner with them to increase their business and increase program participation.
- Increase outreach with the less popular manufacturers.

4.2 Where Are the Installers Located?

Location of Installs per Installer	St. John's	MT P.	PARA-DISE	PORT. COVE	FLAT-ROCK	GFW	KELLI-GREWS	TOR-BAY	BRISTOL'S HOPE	HOLY-ROOD	CAR-BON-EAR	UPPER ISLAND COVE	PLAC-ENTIA	CLAREN-VILLE	GAMBO	BAU-LINE	VIC-TORIA	IRISH-TOWN	ST. LAW-RENCE	Total
[redacted]	-	1	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	1
[redacted]	2	-	2	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	4
[redacted]	-	-	1	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	1
[redacted]	-	-	-	1	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	1
[redacted]	2	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	2
[redacted]	1	-	-	-	1	1	-	-	-	-	-	-	-	-	-	-	-	-	-	3
[redacted]	-	1	-	-	-	-	1	-	-	-	-	-	-	-	-	-	-	-	-	2
[redacted]	-	-	-	-	-	-	-	1	-	-	-	-	-	-	-	-	-	-	-	1
[redacted]	1	1	1	-	-	-	-	-	1	1	-	-	-	-	-	-	-	-	-	5
[redacted]	1	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	1
[redacted]	-	1	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	1
[redacted]	2	-	-	-	-	1	-	-	-	-	1	-	-	-	-	-	-	-	-	4
[redacted]	-	-	-	-	-	-	-	-	-	-	-	1	-	-	-	-	-	-	-	1
[redacted]	1	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	1
[redacted]	9	2	2	-	-	1	4	-	-	1	1		1	1	1	-	-	-	-	23
[redacted]	3	-	-	1	-	-	-	-	-	-	-	-	-	-	-	1	1	1	-	7
[redacted]	-	-	-	-	-	-	1	-	-	-	-	-	-	-	-	-	-	-	-	1
[redacted]	2	-	-	-	-	-	-	1	-	-	-	-	-	-	-	-	-	-	-	3

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[redacted]																				
[redacted]	2	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	2
[redacted]	1	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	1
[redacted]	-	1	-	-	-	-	1	-	-	-	-	-	-	-	-	-	-	-	-	2
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[redacted]	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	1	1
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[redacted]	-	1	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	1
Total	28	8	6	3	2	3	7	2	1	2	2	1	1	1	1	1	1	1	1	72

Observations

- Most installers work on the Avalon, with a few of those installers doing work in Central
- There is the only one participating installer that had no units installed in St. John's

Recommendation

- Need to develop stronger partnerships with installers across the island.

4.3 Price of Installed HRVs

Model	Average Cost	Number of Units	Efficiency of Units
[redacted]	[redacted]	**6**	
[redacted]	[redacted]	6	78%
[redacted]	[redacted]	**4**	
[redacted]	[redacted]	1	75%
[redacted]	[redacted]	3	75%
[redacted]	[redacted]	8	
[redacted]	[redacted]	**6**	75%
[redacted]	[redacted]	1	82%
[redacted]	[redacted]	1	75%
[redacted]	[redacted]	1	
[redacted]	[redacted]	**1**	71%
[redacted]	[redacted]	13	
[redacted]	[redacted]	**4**	75%
[redacted]	[redacted]	1	84%
[redacted]	[redacted]	8	75%
[redacted]	[redacted]	**37**	
[redacted]	[redacted]	5	84%
[redacted]	[redacted]	31	75%
[redacted]	[redacted]	1	73%
Weighted Average	**$2,411**		**76%**

Observations

- There is a wide range of prices for these units. The cost varies from $810 - $2,997.
- The efficiencies vary as well. The price does seem to relatively correspond with the efficiency level although the most efficient model is only $1,417, well below average price.
- The most common participant model is on average the second most expensive unit available and falls in the mid level range of efficiencies available.

Recommendations

- Develop stronger relationships with some of the manufacturers that offer less expensive models. If they become more involved in the program the incremental cost for customers will be less and they may be more likely to participate.
- Increase customer education regarding the market options that are available to them.

4.4 Installer Interviews

- 5 Installers with applications approved were interviewed
- 8 installers with applications declined were interviewed.

1. Are you aware of the program?
   All installers responded yes.

2. Have you promoted the program?
   85% said they have promoted the program.

3. What is the percentage of residential new installations vs. retrofit units?

% of Installers Responded	% new /retrofit
33%	80/20
17%	70/30
25%	50/50
17%	90/10
8%	60/40

4. Do you install HRVs for any contractors?
   92% of installers reported installing HRV's for contractors

5. Do you think they would participate in the program?
   Eight of the installers thought that contractors may participate in the program.

6. What would their barriers to participating be?
   All installers stated that cost would be the barrier to contractors participating in the program with the exception of 2 who were not sure of what the barriers would be.

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7. What is the most common HRV unit that you install?
   67% of installers listed the [redacted] as the most common unit they install. The other listed units are [redacted], [redacted], [redacted] and [redacted].

8. What is the value proposition to the customer for upgrading to efficient unit?

% of Installers Responded	Various Responses
38%	More efficient
23%	Better Controls
15%	More home comfort
8%	Better air quality
8%	Rebate awareness

9. What criteria do you use when making a HRV recommendation to customers?

% of Installers Responded	Various Responses
31%	Efficiency
23%	Less Moisture
23%	Square Footage/ circulation requirements
15%	Better air quality
15%	Home comfort
8%	Better Controls
8%	Low maintenance units
8%	Price
8%	Rebate

10. What is the incremental cost for upgrading to a unit that is available in our program? Just the unit not the controls (at cost and for the customer)?

% of Installers Responded	Various Responses
42%	$350 - $400
17%	$300 - $350
17%	$200 - $300
17%	Declined to answer
8%	$500 - $600

11. What do you think are some barriers for installers to participate in the program?
    Some installers had multiple responses:

% of Installers Responded	Various Responses
58%	Cost
17%	Customers don't understand what the unit is

17%	Customers don't understand the value
8%	Don't get anything from it
8%	Didn't know
8%	Customers not interested in efficiency
8%	Need to edit the installer list
8%	Units are too large
8%	customers are unaware

12. What do you think are some barriers for customers to participate in the program?

Some installers had multiple responses:

% of Installers Responded	Various Responses
67%	cost
8%	customers don't know what a HRV is
8%	Availability of qualifying units
8%	Rebate awareness is low
17%	Unaware of any barriers
8%	Unaware that financing is available

13. What resources would you find most helpful in promoting the program?

    Open ended questions but can use the below to guide the conversation

    a. Cooperative advertising support
    b. Training about takeCHARGE programs and technical training on specific measures
    c. Scholarships to energy conferences or workshops
    d. Publicizing a Trade Ally of the Month in the newsletter
    e. Savings calculation tools

% of Installers Responded	Various Responses
58%	Advertising
25%	Outreach to municipalities and trade allies
8%	Streamline the installer list
8%	Staff training

Applications were rejected

14. Are you aware if any of your applications got rejected?
    Only one of the installers that had applications rejected were aware that it was rejected.

15. Do you check the website to ensure that the unit you are installing is eligible for the program?
    4 installers out of 8 checked the website to ensure their model was rebated.

Observations

- The majority of installs are for new homes.
- Cost would be concerned the main barrier for getting contractors to participate in the HRV Program
- Installers are mostly installing units that are not eligible for the program.
- High efficiency and better controls are the most used selling features for efficient models
- Efficiency, moisture control and circulation requirements are what the installers are using as criteria when selecting a model HRV for the customer.
- The incremental cost for most HRVs is between $350-$400.
- Cost is the largest barrier installers consider for promoting the program. They fear that if they push for an expensive model the customer will go with another install that offers a cheaper model.
- Cost is also considered the largest barrier by installers for customers to participate in the program.
- 58% of installers considered advertising to be the resource that would be most helpful to them in promoting the program.

Recommendations

- Consider more promotional advertising (possibly cooperative) for the program.
- Promote the website to installers as a tool they should use to verify eligibility of the program.

4.5 Other Utility Programs

Newfoundland could be considered unique in regards to the large amount of HRV installations compared to the rest of North American. In the early 1990's homes in Newfoundland began being built with higher insulation levels therefore HRVs needed to be installed to provide ventilation into homes. 96% of all new homes built in Newfoundland use electricity as their main heat source and unlike homes that use gas or oil for heating, electrically heated homes do not require ventilation to safely operate. Homes with electric heat need mechanical ventilation to be used to provide clean air into the home. The high penetration of electric heat in Newfoundland is major factor for developing a program to support the installation of high efficiency HRVs and why there are no other HRV programs offered in North America.

The programs that were used for comparison in this section are programs that partner with trade allies as part of their program delivery. Other utilities use a variety of methods to increase contractor/installer participation and buy in for conservation programs. Some of the methods are listed below.

Relationship Building

Many utilities develop strong trade ally networks and maintain positive relationships with existing trade allies over time. Best practice is to dedicate staff to work with these trade allies, communicate programs, answer questions, and provide a feedback loop to help improve program design.

Dedicated staff has been designated in the HRV program but the staff requires time to build on the existing relationships and develop new ones.

Incentives

Standard Financial Incentives:

Many utilities offer trade ally incentives, often referred to as "contractor rebates" or "distributor incentives." Programs typically provide incentives to contractors for installing certain types of high-efficiency equipment and/or to promote quality installation of equipment. The programs that offer these types of incentives represent a mix of HVAC, new construction, and efficient retrofits. The incentives can vary depending on whether the installed system was an early replacement or a new install and also by level of efficiency.

When designing these types of incentives there is a need to balance incentive structure with added trade ally effort and energy savings. The incentives needed to be on the amount of effort required by the installer to up sell to the higher efficiency. In the case of the HRV installers this may be very little as they are already in their customers home making the recommendation on what type of model to install.

Non Financial Incentives:

Other options used by utilities are to provide financial assistance for training and trade shows. The 2012 Energy Trust of Oregon Trade Allies Survey is considered the most comprehensive trade ally data available. This survey provides insight into trade ally perceptions of cooperative advertising, trainings, roundtable discussions, and trade ally newsletters. The below shows responses of preferences of types of support that can be provided by utilities to trade allies.

Table 35: Percent "Interested" in Types of Energy Trust Support by Sector

	SECTOR			
SUPPORT	RESI-DENTIAL (N = 64)	C & I (N = 29)	RENEW-ABLES (N = 27)	ALL RESPONDENTS (N = 99)
Cooperative advertising support (Energy Trust co-brands on your ads and pays a portion of costs)	83%	76%	78%	81%
Training about Energy Trust programs and technical training on specific measures	78%	86%	81%	79%
Scholarships to energy conferences or workshops	72%	59%	85%	70%
Publicizing a Trade Ally of the Month in the newsletter	48%	59%	56%	55%

There was a similar response for cooperative advertising from the installers interviewed in this evaluation.

A few utilities provide tiered contractor incentives, where contractors are rewarded and ranked based on the quality and quantity of projects, as well as customer satisfaction. These tiered incentives are designed to encourage quality of work and program promotion. They can include a simple ranking system or enhanced benefits such as additional cooperative advertising money.

An example of this type of tiered approach is Ameren Missouri, who recently launched their BizSavers Tiered Trade Ally Network as a way to reward its Top Performing Trade Allies. When a customer searches for a trade ally, the ones with the highest ranking appear first on the list. The rankings are shown below.

Recognition

Other utilities publicly recognize their trade allies with awards. These awards include a variety of categories such as the most energy savings or the greatest number of projects or applications.

Training

There are many different ways of providing training to contractors and trade allies. Effective training can help a trade ally become more qualified to promote and participate in the program.

Various types of training are provided. Below are some examples that other utilities have used:

- **Program basics training** – teaches trade allies the details about what qualifies for an incentive, how to fill out the paperwork, and other program logistics
- **Sales training** – Trade allies in several programs have indicated needing more support in selling the programs. Training that helps them learn how to pitch high-efficiency equipment and how to help customers understand benefits of energy efficiency are appreciated. Other ways to help provide this information is through A return-on-investment and/or payback period calculator, and/or online tools for calculating savings
- **Technical training –** Energy efficiency programs require an increased understanding of energy use and efficient technologies. Training in these areas is helpful to trade allies.

Tools and support

Tools and support can help simplify the trade ally's experience participating in the program and accessing the rebate incentives. The following tools and support enhance a trade ally's experience with program participation.

- **Dedicated website/web portal -** The creation of a website that provides tools and information specific for trade allies is a channel that has been recommended in several evaluation reports of trade ally programs.
- **Trade ally newsletter -** Newsletters have been use as a way to regularly update trade allies on program news. Training is often a topic included in trade ally newsletters.

Recommendations:

- Need to build stronger relationships with installers and contractors.
- Consider offering financial incentives to installers.
- Also, consider alternatives to financial incentives for installers.
- Work with installers to create partnerships that are mutually beneficial. Potentially create an installer program that offers cooperative advertising with installers and website promotion for those installers that are engaged and want to promote the program.