



Annual Report on Progress and Accomplishments - 2011

Operations:

The Energize NY program and its staff operate within the Energy Improvement Corporation (EIC), a NYS Not for Profit Local Development Corporation whose mission is to save money and reduce the waste of energy by enabling energy related improvements through innovative community based outreach and marketing efforts and innovative financing options. EIC through its Energize NY program has two areas of focus: Energize marketing and outreach services and Energize finance services. All services and activities are funded by grants won in 2010 by the Town of Bedford in partnership with the Northern Westchester Energy Action Consortium and the Bedford 2020 Coalition.

Objective:

Our objective is to increase energy efficiency in buildings to reduce energy use and costs, support and develop the local economy and improve the quality of life (health, safety, comfort, Green House Gas Emissions and air quality) of community participants. Energize seeks a market transformation that dramatically increases building energy efficiency upgrades from a historically low baseline of under 1% of New York homes to a significantly higher concentration in the Energize areas of operation.

The program will increase the number of assessments and the assessment to upgrade ratio through a mix of; 1) web services and social media, 2) local municipal engagement and program rollout, 3) the development and deployment of a toolkit that supports a robust community based marketing effort and 4) the rollout of Energize Finance, a PACE Benefit Financing program that will help building owners finance their upgrades.

Significant Accomplishments for 2011:

Work accomplished in 2011 are in four general categories: 1) Web, Social Media, CRM (Customer Relationship Management) System and Homeowner Dashboard, 2) Energize Toolkit / Toolkit Index, 3) Launching NWEAC Towns, and 4) Energize Finance.

1. *Web, Social Media, CRM (Customer Relationship Management) System and Homeowner Dashboard*
 - a. Launched new Energize web sites (energizeny.org, energizebedford.org). User experience has been much improved based on learnings from the Bedford pilot.
 - b. Deployed the first generation of our CRM (Customer Relationship Management) system and are using it to better message and track homeowners to increase the conversion rates from

Assessment to Upgrade. Continued work on data integration project to connect NYSERDA data (CRIS database and others) to Energize program CRM

- c. Expanded our virtual outreach to include an active presence on Facebook and Twitter - continued extension of the Energize Facebook page throughout 2011
 - d. Progress on API and data integration
 - e. Deployed beta version of NYSERDA's online Assessment Application (first in the state)
2. *Tools / Toolkit Index* – Created index of tools and tools themselves that other municipalities and organizations will use to promote and support Energize in the other NWEAC communities.
- a. Expanded our virtual outreach to include an active presence on Facebook and Twitter
 - b. Deployed the Energize “Contractor Rating Index” to help homeowners select a Home Performance contractor
 - c. Energy Coach Video FAQs (web and YouTube)
 - d. Field Manual (doc)
 - e. Program overview (ppt)
 - f. Real Estate / Energize Branding presentation (ppt)
 - g. Launched the “Energize Home Brand” and presented our first round of certificates to 20+ homeowners in the Bedford Pilot,
 - h. Facebook and social media training (classroom)
 - i. Energize mission, vision and core values (doc)
 - j. Post upgrade anti-rebound training (PDF)
 - k. Newsletter (email)
 - l. Logo and branding (various templates and jpgs)
 - m. Program banners (printed)
 - n. Marketing collateral templates (doc, PDF, etc.)
3. *Launching NWEAC Towns* – The Bedford Pilot ran from Jan 2011 through the end of 2011. During the second half of 2011 we began to do active outreach with NWEAC municipalities to determine launch readiness. These activities lead us to create a high-level launch-planning document with specific steps that a municipality would take to prepare for an official launch of the program. Continued outreach/signups throughout 2011 have resulted in 500+ homeowners in our database with 250+ in process and 90+ with completed upgrades,
4. *Energize Finance:*
- a. Energy Improvement Corp (EIC)
 - i. Incorporation + Board seated (Complete)
 - ii. Bylaws passed by Town Board + EIC Board (Complete)
 - iii. Seating Officers (Complete)
 - iv. Legal Representation (Dec 15th) / Insurance / Employment

Policies

b. EIC PACE Benefit Finance Program Development

- i. Underwriting Process and Criteria Final Draft (Complete)
- ii. Servicing Process Final Draft (Complete)

5. *Additional Accomplishments:* a) rebranded program to Energize New York, b) created the “Energize Contractor Corps” to include a subset of NYSERDA’s BPI certified Home Performance contractors, c) transferred staff to EIC from Town of Bedford, d) Established Energy Advisory Committee and Finance Advisory Committee meetings, e) kicked off case study project to examine before and after energy use on 10-25 homes in NWEAC geography.

6. *Outlook*

In 1q2012 the program launched its first post-pilot communities, a combined town and village rollout under the Energize Ossining brand. By the end of 2q2012 another 4+ municipalities will be officially launched using the Energize [community name] brand. By early 2013 most, if not all, of the remaining NWEAC communities will be launched with the full complement of community outreach, web, social media, and marketing collateral and support tools. Energize currently supports interested homeowners in all eligible NWEAC municipalities unrelated to the launch status of their community. The program will continue to provide a high level of direct homeowner support before, during and after an NWEAC community launches the Energize program in their municipality. Beyond the NWEAC geography the program will be supporting, via a sub-contractor, additional Energize “starter towns” as part of a small NYSERDA grant. The project will bring a subset of the Energize toolkit, plus technical support to be delivered by the Croton Energy Group, to interested communities in the 7 county mid-Hudson Valley region including the non-NWEAC communities of Southern Westchester. Energize Finance will be completing all required documentation and legal work to launch in Bedford by 2nd Quarter 2012 and allow other NWEAC municipalities to join EIC and offer financing by 3rd Quarter 2012.