



## Annual Report on Progress and Accomplishments – 2012 FINAL REPORT

### **Operations:**

The Energy Improvement Corporation (EIC) is 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 has two areas of focus: Energize marketing and outreach services through the Energize NY Program and finance services for qualified energy upgrades through the Energize NY Finance Program. 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:**

EIC's 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. EIC seeks a market transformation that dramatically increases building energy efficiency upgrades from a historically low baseline of fewer than 1% of New York buildings to a significantly higher concentration in the EIC areas of operation.

The program will continue to 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 Property Assessed Clean Energy (PACE) Benefit Financing program that will help building owners finance their upgrades.

### **Significant Accomplishments for 2012:**

Work accomplished in 2012 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. Updated energizeny.org web site to manage and distribute leads from around the region. Launched balance of NWEAC municipal web sites.
  - b. Deployed the second generation of our CRM (Customer Relationship Management) system and dashboard. Staff is now using these to message and track homeowners. Dashboard is not accepting and processing GJGNY applications with NO STAFF INTERVENTION required for more than 50% of all homeowner applicants. Data from the CRM Data system will be used to connect the local communities to residents interested but hesitant about completing an upgrade.
  - c. Extended virtual and hyper-local outreach with an active presence on Facebook, Twitter, local blogs and local media properties.

- d. Completed API and data integration project
  - e. Released commercial version of NYSERDA's online Assessment Application (first in the state) in our homeowner dashboard.
2. *Tools / Toolkit Index* – Created Updated and extended tools and index to be used by NWEAC and other municipalities and organizations to promote and support Energize in the other NWEAC communities.
- a. Continued to expand our virtual outreach and extended our active presence on Facebook and Twitter
  - b. Updated the Energize “Contractor Rating Index” to help homeowners select a Home Performance contractor
  - c. Added new Energy Coach Videos
  - d. Extended the Field Manual (doc)
  - e. Program overview (ppt)
  - f. Real Estate / Energize Branding presentation (ppt)
  - g. Extended the “Energize Home Brand” and presented the second and third round of certificates to Bedford homeowners.
  - h. Facebook and social media training (classroom)
  - i. Energize mission, vision and core values (doc)
  - j. Post upgrade anti-rebound training (PDF)
  - k. Continued newsletter (email) distribution
  - l. Logo and branding (various templates and jpgs)
  - m. Program banners (printed)
  - n. Marketing collateral templates (doc, PDF, etc.)
3. *Launching NWEAC Towns* – Launched all the remaining NWEAC municipalities except for Village of Croton on Hudson. Continued outreach/signups throughout 2012 have resulted in 1,00+ homeowners in our database with 500+ in process and 260+ with completed upgrades,
4. *Energize NY Finance Program Development*
- i. Completed all legal work to begin accepting Municipal Members
  - ii. NY Municipalities now being accepted as Members
  - iii. Trustee Bank chosen
  - iv. RFP for Credit Services being readied
  - v. Pre-Applications for Financing being accepted at Energize Web site

5. *Additional Accomplishments:* a) Launched Senior Outreach program, 2) continued outreach and development of the “Energize Contractor Corps” , c) moved staff and offices to new space in Yorktown, d) continued Energize Advisory Committee and Finance Advisory Committee meetings, e) continued case study project to examine before and after energy use on 10-25 homes in NWEAC geography with five completed cases finalized.

6. *Results:*

**279** homes upgraded in NWEAC geography (137% increase year over year)

**\$3,515,400** in local economic activity

**31** jobs created for local economy

**\$326,430** in annual homeowner cost savings

**658** tons (110 cars<sup>3</sup>) in CO<sub>2</sub> emission's reductions

7. *Outlook*

EIC’s mission and ultimate success will hinge on moving past the current focus on the grant deliverables and leverage our proprietary methods and processes into delivering a superior Energize product that is determined to be essential to the goals of our clients and stakeholders. The Energize NY Program will continue to provide a high level of direct homeowner support and be expanding to support commercially owned building stock as well to further deliver the services and community benefits municipalities require. In 2013, ENY will seek to exceed 300 new upgrades.

The Energize Finance Program has completed all required documentation and legal work in 2012 to offer financings in member municipalities by the 2<sup>nd</sup> Quarter 2013. Two municipalities in Westchester are currently members and thirteen additional municipalities throughout the Mid Hudson Valley are in process to become members. Expanding membership and scaling up financing demand is key to the long term sustainability of the Energize effort.

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.