



Neighbor to Neighbor

ENERGY CHALLENGE

Small Changes. **BIG RESULTS.**

Better Outreach through Data

July 11, 2012

Roger Smith

www.CTEnergyChallenge.com



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What is Neighbor to Neighbor



A 14 town community-based program that uses an outreach staff to enlist trusted sources to acquire customers



Ratepayer-funded direct install/assessment program as gateway to upgrades, rebates and financing – historical conversion rate < 10%



N2N manages subset of approved vendors working in ratepayer fund program



Comprehensive technology platform employed with extensive data collection and analysis capabilities, built on Salesforce.com



Governor Malloy announces the Program



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Program Partners

Our outreach and data team



Kerry O’Neill, Program Manager
Coordinates partners, leads real-time data analysis



Roger Smith, Madeline Priest
Responsible for outreach, data collection from field



Technology partner which customized Salesforce database for program use



Kat Donnelly- designed data collection system, conducting look-back analysis



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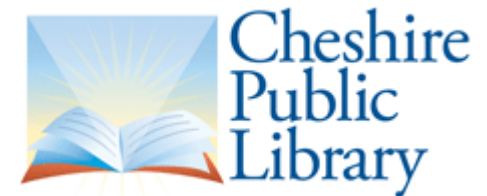
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Community Partners

Main Outreach Strategies

- Education
- Faith
- Neighborhood-specific
- Community
- Town government
- Business (incl. diner and realtor)





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Word of Mouth Outreach





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Planning Tools

	A	B	C	D	E	F	G	H	Controls hidden. Press	
1	Westport	Overall Goals for July - September	Overall Actuals for July-September	July 1-7 (JL OFF)	Goals	Actuals	July 8-14 (JB, BP OFF)	Goals	Actuals	July 15 Corps.
24	Social Media						JL to start HES article for Fall			
25	Existing Coalition Partners (BP)									
26	Conservative Synagogue	10 HES		(BP) Set up meeting with conservative synagogue, ask about poolside luncheon			Ladies pool side luncheon on July 11 (Jen or Donna to attend)			
27	Westport Y	15 HES		(BP) is scheduling a meeting						Meeting Cohen. present identify raising (testing) posting website placem
28	DMA	20 HES		(BP) is setting up meeting w/new president Steve Desloge			Sidewalk Sale on July 13 and 14 (not set up yet)	5 HES		Fine Ar on July
29								- Ask number of members, - fundraising goals remind them that there is \$225 at stake for every sign up, - we will help you realize your fundraising but we need your full cooperation/ help, - this is community		



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Data Tracking Tools

Projects New Project Projects Help ?

Action	Project Name	Auditor/Contractor	Created Date	Date Lead Received	Stage	Date HES Visit Booked	Date HES Assessment Completed	Estimated Completion Date
Edit Del	Household - Bethany - HES Assessment 2012		12/2/2011	12/2/2011	Completed	1/20/2012	1/20/2012	1/20/2012
Edit Del	Household - Bethany - HES Improvement 2012		2/15/2012	2/15/2012	Improvement Completed			2/14/2012

Open Activities New Task New Event Open Activities Help ?

No records to display

Activity History Log A Call Mail Merge Send An Email View All Activity History Help ?

Action	Subject	Name	Related To	Task	Due Date	Assigned To	Last Modified Date/Time
Edit Del	Mass Email:			✓	4/17/2012	Jeff Friesen	4/17/2012 7:15 PM
Edit Del	Earned Points		Household - Bethany - HES Improvement 2012	✓	2/15/2012	Jeff Friesen	2/15/2012 12:35 PM
Edit Del	Earned Points		Household - Bethany - HES Assessment 2012	✓	1/24/2012	Jeff Friesen	1/24/2012 6:16 AM
Edit Del	Thank You for Signing Up to Volunteer			✓	4/11/2011	Jeff Friesen	4/12/2011 12:28 PM
Edit Del	Email: Congratulations for Joining the Neighbor to Neighbor Energy Challenge!			✓	4/11/2011	Madeline Priest	4/12/2011 12:28 PM

Utility Records New Utility Record Utility Records Help ?

Action	Utility Record Name	A.AMOUNT	A.USG_STRT_DATE	A.USG_END_DATE	A.NUM_OF_DAYS	A.USAGE
Edit Del	UR-0025637	\$84.32	2/22/2010	3/24/2010	30	377
Edit Del	UR-0025638	\$86.86	3/24/2010	4/23/2010	30	391
Edit Del	UR-0025639	\$83.98	4/23/2010	5/21/2010	28	375
Edit Del	UR-0025640	\$79.98	5/21/2010	6/22/2010	32	353
Edit Del	UR-0025641	\$101.02	6/22/2010	7/22/2010	30	468

[Show 5 more »](#) | [Go to list \(27\) »](#)





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Data Tracking Tools

2. Outreach Tracking

	Weeks in Quarter	Weeks Completed	% Weeks Completed								Last Updated
	13	13	100%								7/2/2012
Group A	HES Goal	HES to date	% to Goal	Q1 HES signup	Lighting Goal	Lighting to date	% to Goal	Lighting Complete	Complete Rate	Lighting Q1	
Cheshire	85	71	84%	24	20	14	70%	7	50%	8	
Glastonbury	85	68	80%	64	53	79	149%	29	37%	25	
Portland	50	53	106%	29	15	22	147%	7	32%	1	
Weston	25	20	80%	36	10	3	30%	2	67%	5	
Group B	HES Goal	HES to date	% to Goal	Q1 HES signup	Lighting Goal	Lighting to date	% to Goal	Lighting Complete	Complete Rate	Lighting Q1	
East Hampton	90	70	78%	54	10	14	140%	10	71%	16	
Ridgefield	100	62	62%	112	0	7			0%	10	
Westport	200	111	56%	246	0	1			0%	0	
Wethersfield	100	37	37%	63	40	40	100%	30	75%	32	
Wilton	120	61	51%	71	0	8		2	25%	4	
Group C	HES Goal	HES to date	% to Goal	Q1 HES signup	Lighting Goal	Lighting to date	% to Goal	Lighting Complete	Complete Rate	Lighting Q1	
Bethany	36	10	28%	19	12	7	58%	5	71%	12	
Lebanon	66	48	73%	60	25	6	24%	5	83%	3	
Mansfield	52	21	40%	25	42	10	24%	6	60%	15	
Windham	65	35	54%	48	20	21	105%	12	57%	23	
E. Haddam	32	23	72%	15	25	15	60%	6	40%	2	
TOTALS	1106	690	62%	866	272	247	91%	121	49%	156	



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Data Tracking Tools

OA - Event Type	Fiscal Period		Bethany	Cheshire	East Haddam	East Hampton	Glastonbury	Lebanon	Mansfield	Portland	Ridgefield	Weston	Westport	Wethersfield	Wilton	Windham	Total
-	Q4-2011	Record Count	0	0	0	0	1	0	0	0	0	0	0	0	6	0	7
	Q1-2012	Record Count	0	0	0	0	1	0	0	0	1	0	0	0	0	0	2
	Q2-2012	Record Count	0	0	0	0	0	0	0	0	0	0	3	0	0	0	3
	Subtotal	Record Count	0	0	0	0	2	0	0	0	1	0	3	0	6	0	12
Business Organization	Q2-2011	Record Count	0	0	0	0	0	0	0	0	0	0	1	0	0	0	1
	Q3-2011	Record Count	0	0	0	0	0	0	0	0	1	0	0	0	1	0	2
	Q1-2012	Record Count	0	0	0	0	10	0	0	0	0	0	1	0	0	0	11
	Q2-2012	Record Count	0	0	0	0	9	0	0	8	5	0	3	0	0	0	25
	Q3-2012	Record Count	0	0	0	0	0	0	0	3	0	0	0	0	0	0	3
	Subtotal	Record Count	0	0	0	0	19	0	0	11	6	0	5	0	1	0	42
Call-In	Q1-2011	Record Count	0	0	1	0	0	0	1	0	0	0	1	3	2	2	10
	Q2-2011	Record Count	0	2	0	0	2	4	2	2	1	0	0	2	0	5	20
	Q3-2011	Record Count	0	1	0	2	7	5	6	0	3	0	1	2	1	1	29
	Q4-2011	Record Count	0	2	1	7	6	7	1	0	2	3	3	11	5	2	50
	Q1-2012	Record Count	0	0	0	1	4	1	0	0	1	1	5	8	0	1	22
	Q2-2012	Record Count	1	3	0	3	3	0	1	4	2	0	2	7	5	0	31
	Q3-2012	Record Count	0	1	0	1	0	1	1	3	0	0	0	0	0	2	9
	Subtotal	Record Count	1	9	2	14	22	18	12	9	9	4	12	33	13	13	171
Call Night	Q1-2012	Record Count	0	0	0	0	0	1	0	0	0	0	0	0	0	0	1
	Q2-2012	Record Count	0	1	0	0	0	5	0	0	0	0	0	1	0	1	8
	Q3-2012	Record Count	0	0	0	0	0	1	0	0	0	0	0	0	0	0	1
	Subtotal	Record Count	0	1	0	0	0	7	0	0	0	0	0	1	0	1	10
Canvassing	Q4-2010	Record Count	0	0	0	1	0	0	0	0	0	0	0	0	0	0	1
	Q1-2011	Record Count	0	0	0	0	0	0	0	0	0	0	0	0	0	3	3
	Q2-2011	Record Count	0	6	0	13	1	0	0	7	0	0	0	4	0	30	61
	Q3-2011	Record Count	0	1	0	2	0	25	0	2	0	0	0	5	0	1	36
	Q4-2011	Record Count	0	0	0	0	0	1	0	1	0	0	0	4	0	5	11
	Q1-2012	Record Count	0	0	0	22	2	1	0	1	0	0	0	2	0	5	33
	Q2-2012	Record Count	13	40	5	43	34	2	9	10	0	0	3	0	0	27	186
	Q3-2012	Record Count	1	4	0	10	7	0	0	1	0	0	0	0	0	0	23
	Subtotal	Record Count	14	51	5	91	44	29	9	22	0	0	3	15	0	71	354

Event Hours ↑	Event Town	Event Type	Host Organizer Type	Partner Meeting Topic(s)	Presentation by	Number of Outreach Staff	Number of Outreach Volunteers	# of Attendees	# Signed Up for Lighting Retrofit	# of Attendees to Sign-up for HES	Notes about Pitch
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Event Start Date/Time: 4/2/2012 (2 records)

Outreach Activity Name: [Brownstone Quorum Presentation](#) (1 record)

0.50	Portland	Coalition Partner Presentation/Stakeholder Meeting	Community Group	HES and upgrades	Chamae Munroe	2	0	12	0	4	-
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Outreach Activity Name: [Coalition Partner Energy Action Alert \(refer-a-member link\)](#) (1 record)

13,102.30	-	General Coalition Partner Outreach	N2N	HES, upgrades		0	0	1	0	1	-
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Event Start Date/Time: 4/3/2012 (6 records)

Outreach Activity Name: [Cheshire Career Day](#) (1 record)

3.00	Cheshire	Presentation to Other Non-Coalition Partner	N2N	Environmental Careers		3	0	0	0	0	-
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Outreach Activity Name: [Glastonbury Relay for Life Committee Meeting](#) (1 record)

1.00	Glastonbury	Coalition Partner Presentation/Stakeholder Meeting	Community Group	Coalition partner, HES		1	0	0	0	0	-
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Outreach Activity Name: [Mansfield Town Canvass](#) (1 record)

1.17	Mansfield	Canvassing	Town	-		2	3	6	3	3	-
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Outreach Activity Name: [Meeting with Cheshire High School Green Team](#) (1 record)

Event Hours ↑	Event Town	Event Type	Host Organizer Type	Partner Meeting Topic(s)	Presentat by	Pitch Successful Approaches	Thoughts for Improvements	Sign-ups/Hour	Sign-Ups/Staff Hour
<input type="checkbox"/> Event Start Date/Time: 4/2/2012 (2 records)								0.00	0.00
Outreach Activity Name: Brownstone Quorum Presentation (1 record)								8.00	4.00
0.50	Portland	Coalition Partner Presentation/Stakeholder Meeting	Community Group	HES and upgrades	Chamae Munroe	-	-		
Outreach Activity Name: Coalition Partner Energy Action Alert (refer-a-member link) (1 record)								0.00	#Error!
13,102.30	-	General Coalition Partner Outreach	N2N	HES, upgrades		-	-		
<input type="checkbox"/> Event Start Date/Time: 4/3/2012 (6 records)								0.75	0.05
Outreach Activity Name: Cheshire Career Day (1 record)								0.00	0.00
3.00	Cheshire	Presentation to Other Non-Coalition Partner	N2N	Environmental Careers		The event was not focused on N2N but rather environmental careers as a whole. We discussed the paths we took to get to our current jobs and what the environmental field is heading in the future.	-		
Outreach Activity Name: Glastonbury Relay for Life Committee Meeting (1 record)								0.00	0.00
1.00	Glastonbury	Coalition Partner Presentation/Stakeholder Meeting	Community Group	Coalition partner, HES			-		
Outreach Activity Name: Mansfield Town Canvass (1 record)								5.13	1.03
1.17	Mansfield	Canvassing	Town	-			-		
Outreach Activity Name: Meeting with Cheshire High School Green Team (1 record)									



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3. Using Data- improving complete rates

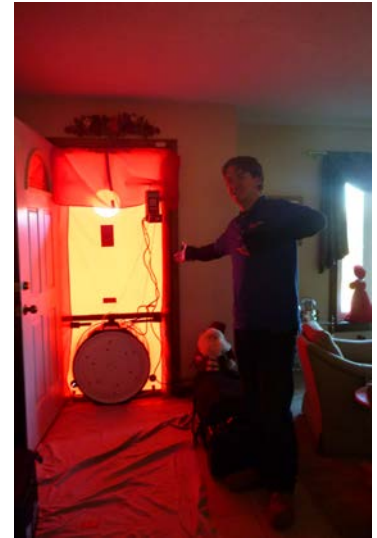
Learning: significant drop-off if more than ~3 days before contractor calls to schedule.

Actions:

Contractors: must contact within 3 business days

Neighbor to Neighbor:

- Same day and in-field data entry
- Receipts with contractor name
- Automated reminder email upon entry of lead.
- Weekly call nights focusing on customers lost by contractors.
- Outreach staff obsessively watches high quality leads

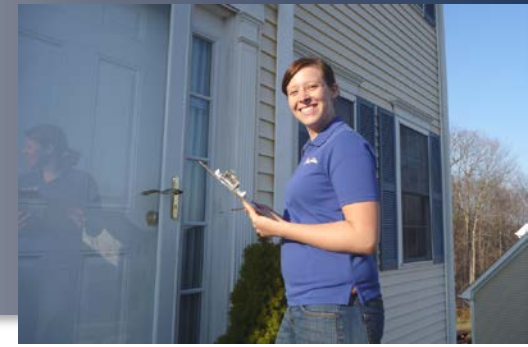




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3. Using Data- comparing outreach strategies

Learning:

- Canvasses not walking tables.
- Initial data indicated tabling/canvass had similar #s for sign-ups per staff hour.
- *But...* over time far *lower canvass complete rates*

Actions:

- In spring 2012 began to use canvassing as part of multi-touch neighborhood strategy with letter from town, house parties.
- Increase use of volunteers to improve sign-ups per staff-hour (clean energy corps not allowed to approach doors alone)
- Watching data for summer 2012 to see impact



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3. Using Data- comprehensive outreach model

To inform last year of program, Earthmarkets creating outreach model broken down by quarter to assess:

- Staff hours/cost per energy assesment sign-up
- Hours/cost per energy assement complete
- Cost per completed upgrade

Initial findings:

- Highest performing outreach strategies include group presentations and workshops.
- Significant variation over time, by town
- More to come!



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Service Corps

4. Lessons learned working with student corps

8-10 Americorps staff- face of program in community. Liked by volunteers and town leaders and public appreciates their energy.





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Service Corps

4. Lessons learned working with student corps

Difference between service corps and goal-driven outreach programs.

Americorps service-based programs may be better suited for implementation of set programs (installing bulbs, canvassing, etc.) than community outreach and organizing.

Organizing- longer hours, more responsibility, more flexibility.

Choice of using trained outreach staff for staff management vs volunteer development.





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5. New Campaign: realtors

- Give HES- realtors giving energy assessments/energy saving measures at time of sale
- Realtors charged upon completion of audit/direct install service
- Software provider interested in providing similar service for otl

giveHES Program
(Home Energy Solutions)



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Questions?



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