

Community Engagement Toolkit: Energy Efficiency Customer Engagement Pathway

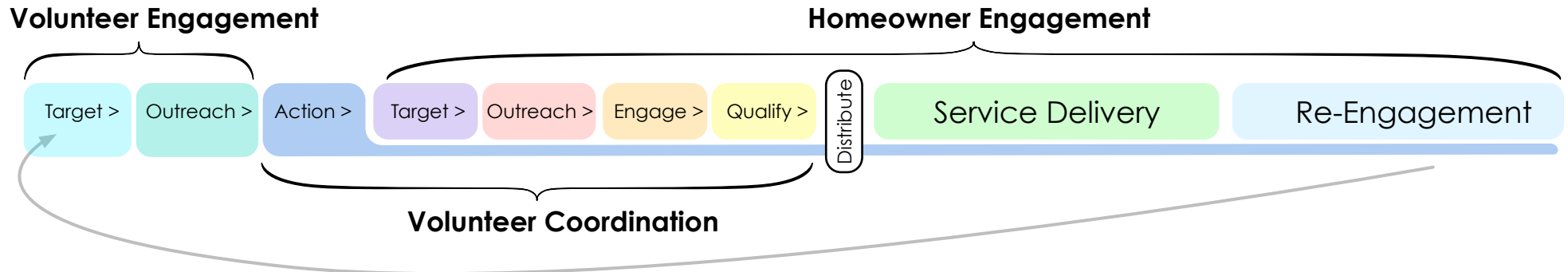
Building Demand through Community Engagement

This toolkit is designed for individuals and organizations implementing local community engagement campaigns. These resources provide a framework for organizing community demand for energy services.

These successful tactics emerged from our experience implementing a local community engagement program in Washington, D.C. Over the past two years, we have tested and refined these tools, which emphasize cultivating long-term relationships with individual community members.

The Energy Efficiency Customer Engagement Pathway is for organizations that engage community members making energy upgrades. The pathway provides a structure for engaging people who are making financial decisions affecting their homes. These resources help organizers decide what to measure and which tactics to use in each step of the pathway.

The Energy Efficiency Customer Pathway



Stage Definitions

Target: Assess existing networks to identify local volunteers with community connections, respect and power.

Outreach: Recruit local volunteers.

Action: Prepare, train and integrate volunteers to catalyze community networks and facilitate the homeowner engagement process.

Target: Train volunteers to target households and neighborhoods utilizing demographic data and existing community networks.

Outreach: Volunteers gauge previously targeted homeowners' interest in the program.

Engage: Volunteers educate about the benefits of participation and facilitate a deeper commitment to the program.

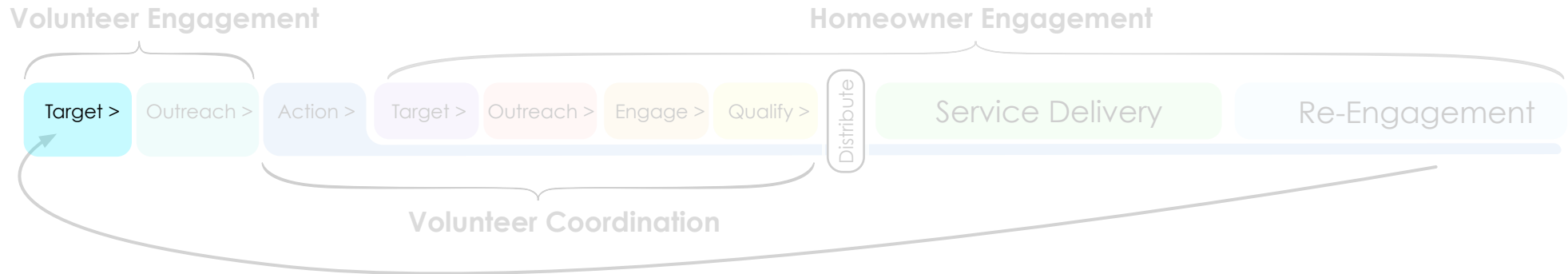
Qualify: Based on systematic data collection throughout the engagement process, ensure "energy upgrade leads" meet program requirements.

Distribute: A process, whereby leads are connected to contractors.

Service Delivery: Provide consumer advocacy in partnership with Program Administration.

Re-Engagement: Using post-energy upgrades data, re-engage homeowners to serve as program validators.

Volunteer Targeting



Target >

Assess existing networks to identify local volunteers with community connections, respect and power.

Tactics:

Identify individuals and networks that are most powerful and respected. Ideal individuals have a connection to their local community; demonstrated commitment to the environment or social justice issues; have availability in the evenings and on weekends; access to computer/internet and/or transportation; organizer skill sets.

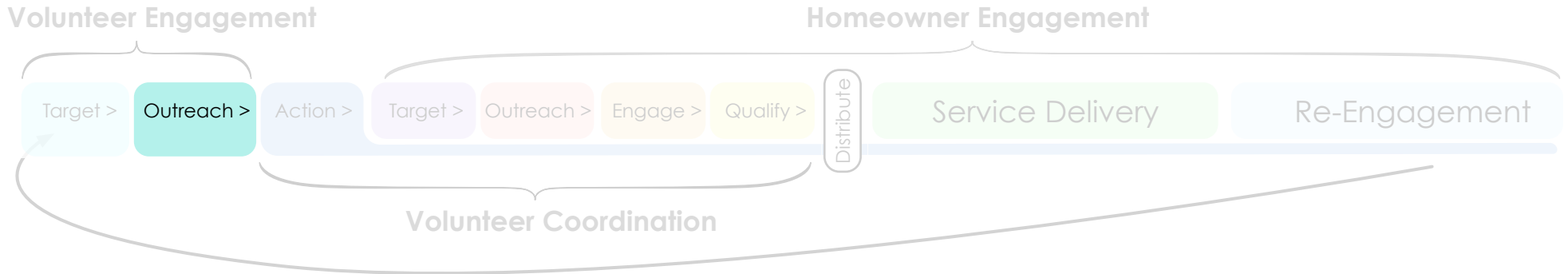
Data:

Track: Potential volunteer resources.

Outputs:

Potential volunteer resources are mapped.

Volunteer Outreach



Outreach >

Recruit local job seekers.

Tactics:

Hold one-on-one meetings to gain volunteer commitment to campaign; volunteers through **door-to-door canvassing**; **community events**; **public spaces**; and **new media** outreach through channels like Facebook, Twitter and local listservs.

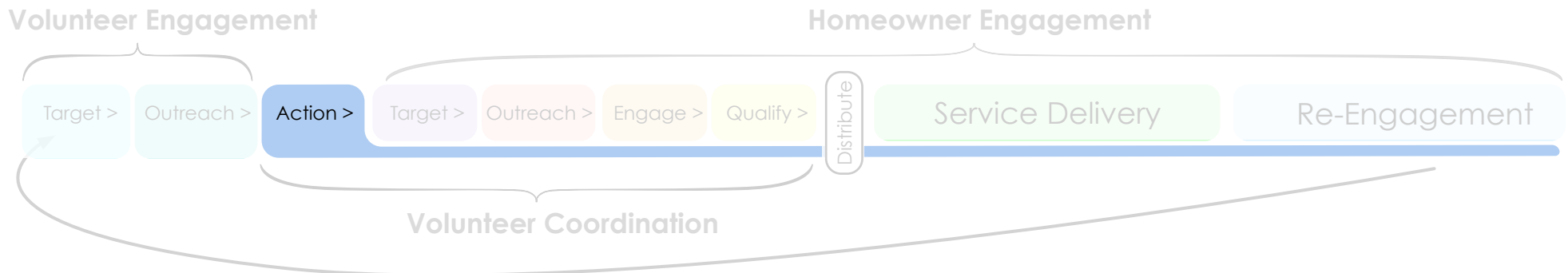
Data:

Track: volunteer interests; volunteer time availability; volunteer resources; contact information.

Outputs:

Volunteers committed to campaign objectives and responsibilities.

Volunteer Action



Action >

Coordinate volunteer teams to take action and lead the homeowner outreach and engagement process.

Tactics:

Determined by the community's engagement objectives and strategy for homeowner lead generation. Coordinate and manage volunteer teams to canvass, phone bank, canvass on the street with a clipboard, and work with offline social networks to contact homeowners and then engage them at Energy meetings, Volunteer energy assessments, and neighborhood weatherizations.

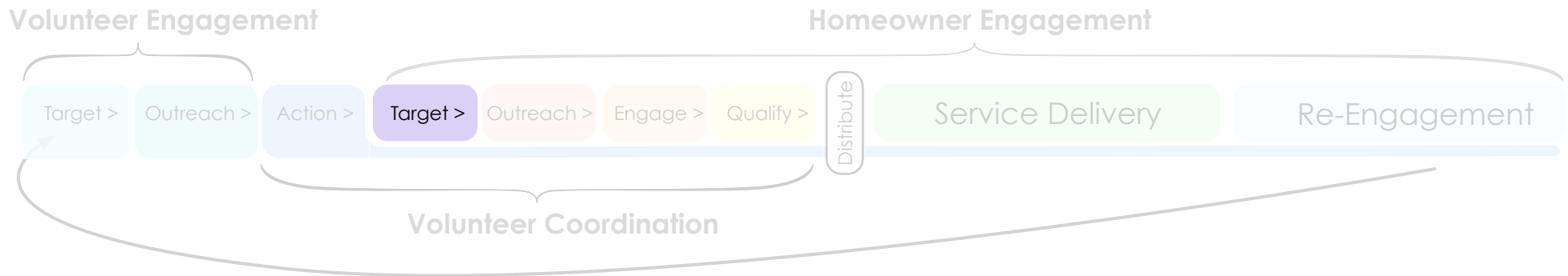
Data:

Volunteer participation rates; Volunteer activity tracking; Volunteer capacity.

Outputs:

Volunteers understand engagement strategy and are ready to use key tactics to execute.

Homeowner Target



Target >

Volunteer teams target households and neighborhoods using demographic data and existing community networks.

Tactics:

Targeting using existing data points for building stock, homeownership, and household income to build a targeted universe of potential program participants. Targeting using existing community network knowledge to identify potential households.

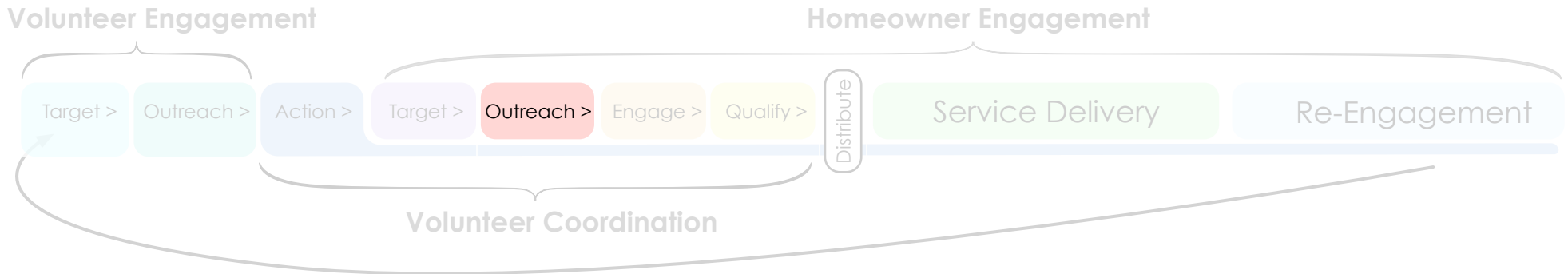
Data:

Track: Build homeowner outreach lists for each volunteer team and organize them in your database.

Outputs:

Target lists for Outreach tactics.

Homeowner Outreach



Outreach >

Volunteers gain experience through the program.

Tactics:

Offline campaign organizing tactics such as **door to door canvassing**, **phone banking**, and **community banking** in community spaces. Online tactics such as **social media** pathways like Facebook, Twitter and community listservs and traditional media like local newspapers.

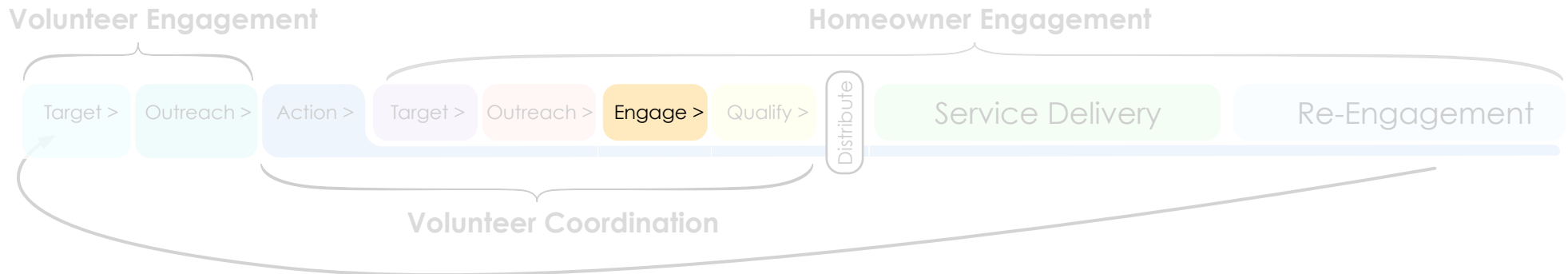
Data:

Track: Interest in weatherization and volunteering; Basic home information, such as building stock, heating and cooling type; Lead source.

Outputs:

Data on Homeowner interest.

Homeowner Engagement



Engage >

Volunteers educate UVci hthe benefits of participation and gYW fY a deeper commitment to the 'dfc[fUa "

Tactics:

Engage potential program participants identified as 'interested in weatherization' during the outreach phase in self-organized Energy Meetings, Volunteer Energy Asestsments, block party weatherization showcases, and engagement phone calls.

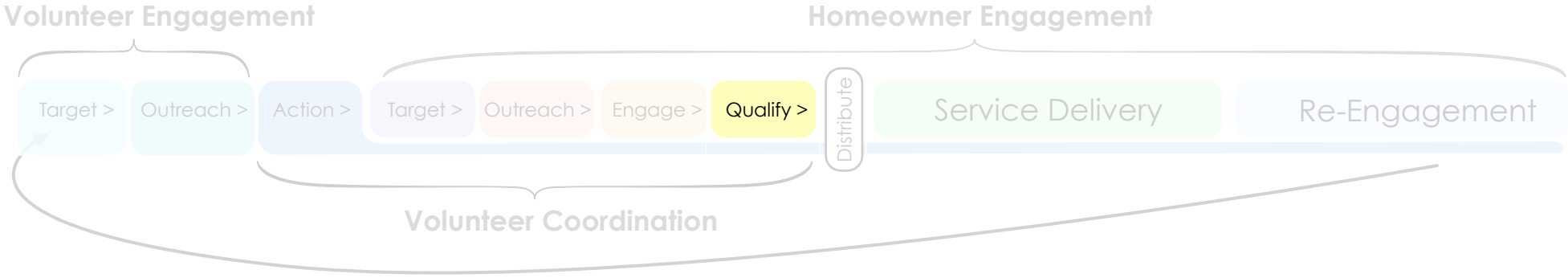
Data:

Track: Event attendance, Leads generated for partner contractors.

Outputs:

Homeowner decision to progress or not progress in pathway to weatherization.

Homeowner Qualification



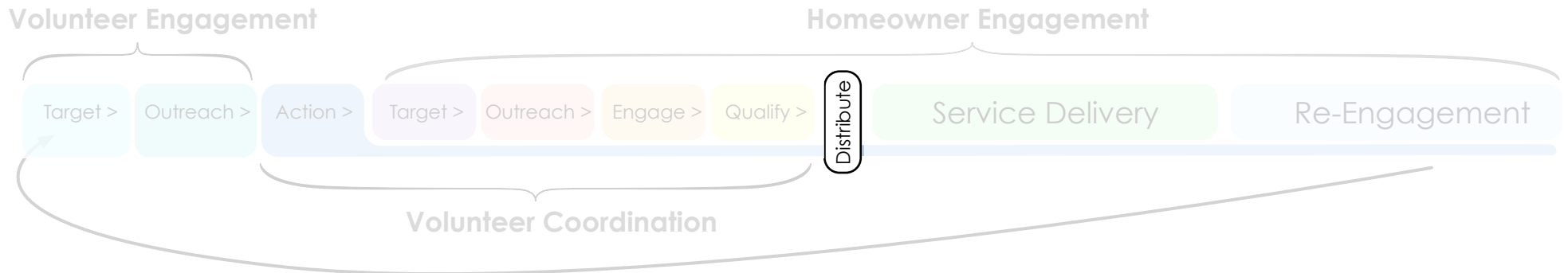
Qualify > Using data collected throughout the engagement process, ensure "YbYf[mi d[fUXYg]leads" meet program requirements.

Tactics: NA

Data: Track: Any additional data based on program specifications. It is extremely important that you ensure that the leads that you are connecting with contractors are qualified for and understand the purpose of the program.

Outputs: Homeowner lead has all necessary data in their account record to be considered a pre-qualified lead for program.

Homeowner Distribution

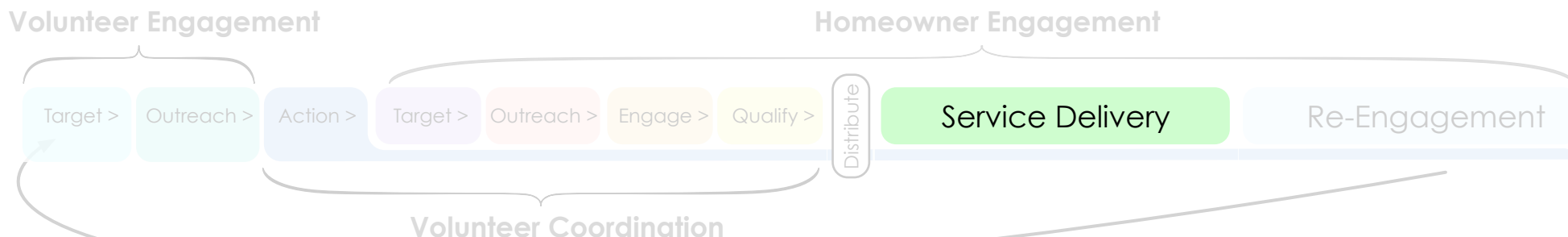


Distribute >

A process where leads are connected to contractors to complete the work.

- Tactics:** Distribute home leads who have indicated interest in the program during the outreach and engagement phases and have all pre-qualification data completed in their account.
- Data:** Export all contact data and history and share with the partner contractor.
- Outputs:** High-quality leads passed to contractors for next step in service delivery.

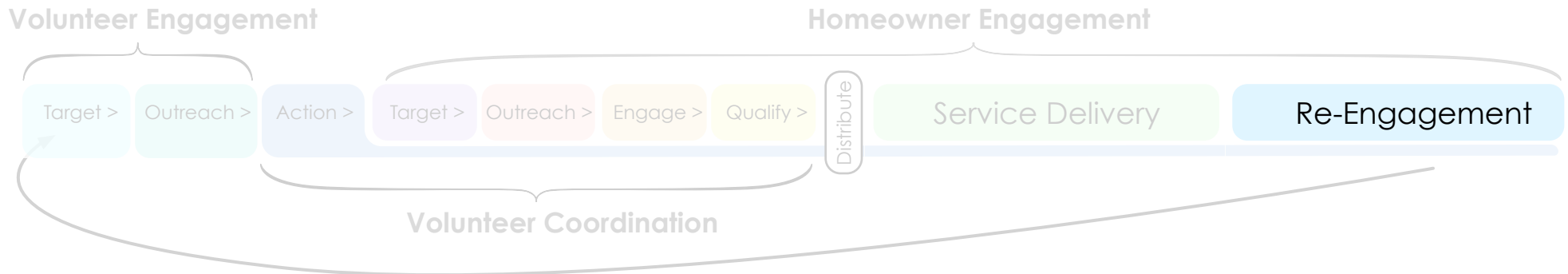
Service Delivery



Service Delivery > Provide consumer advocacy in partnership with Program Staff

- Tactics:** Monitor the service delivery progress of their qualified leads periodically communicating with them to celebrate or mediate issues between the partner contractor.
- Data:** Track: Weatherization stage change data (time); Weatherization service delivery data; Issues with partner contractors; Reason for not progressing.
- Outputs:** Homeowner successfully completes weatherization and has had a positive experience.

Re-Engagement



Re-Engagement > Using post-energy upgrades data, strategically re-engage homeowners to serve as program validators.

Tactics: Re-engage homeowners to serve as program validators through post-weatherization surveys, schedule one-on-one meetings and invite homeowners to host volunteer team meetings.

Data: Track: Customer testimonial; Future volunteer interest.

Outputs: Gauged interest in being a volunteer/hosting a home energy meeting.