



Sustainable Claremont

Working for Environmental
Economic and Social Sustainability



a study of success

The Energy Champion Pilot Program was designed with the belief that local nonprofit organizations are well positioned to promote the benefits of home energy upgrades—and with the intention of tapping into the networking resources and the community trust that these organizations offer for the benefit of local homeowners.

The purpose of the Energy Champion (EC) Program is 1) to provide visibility and promotional support for Energy Upgrade California in Los Angeles County (EUCLA), 2) to increase the number of homeowners taking advantage of home energy upgrades, 3) to give funding support for local nonprofits and community-based organizations, and 4) to increase the demand for new green energy jobs.

Sustainable Claremont is a 501(c)3 nonprofit organization designed to engage people in education and action to create a more sustainable community—environmentally, socially, and economically. It is a citizens group, working independently but in cooperation with the Claremont city government.



In this study, you will hear from leaders of The City of Claremont, local Participating Contractors, and local nonprofit organizations. What all have in common is a commitment to the success of the EC and EUCLA Programs. All demonstrate that the original strategies proposed in the EC Program design are both successful and right on target. Here are some of the major strategies:

- Grassroots collaboration with community and government leaders who are committed to sustainability and energy conservation
- Grassroots collaboration with community organizations and Participating Contractors in a wide range of events to reach individual homeowners
- Incentive funding for nonprofits, based on the number of home energy upgrades completed
- High quality marketing materials, advertising, and publicity to build EUCLA brand awareness
- Personalized marketing support
- Partnership development
- Increasing the demand for new green energy upgrades

energy champion

Sustainable Claremont is the most successful Energy Champion in Los Angeles County. Their organization became an Energy Champion in late August 2011 and participated in the EC Program Training in September 2011. Their first Homeowner Action Form (HAF) was submitted for a home energy upgrade within one month, enabling Sustainable Claremont to begin benefitting from the Energy Champion Program. They quickly took ownership of being an Energy Champion and integrated the EC mission with their own.



Of the the total 63 hafs submitted, and the 120 new HAFs pending submission, in Los Angeles County, as of May 1, 2012, the overwhelming majority are on track to be from homeowners that Sustainable Claremont brought into the EUCLA program. With the increased demand for home energy upgrades, local contractors have been able to add employees to their workforce.

In 2009, Sustainable Claremont formed an “Energy Action Group” named CHERP, the acronym for Claremont Home Energy Retrofit Program. In 2011, the leadership of CHERP recommended becoming an Energy Champion in order to raise funds, to extend their reach, to tap into valuable educational tools and resources, and to take advantage of the marketing and promotions available through EUCLA.

Sustainable Claremont is committed and passionate about the issue. They have strong leadership, and they are dedicated to building partnerships and taking collaborative action to help homeowners, job seekers, the community, and the environment. They have influenced other organizations to become Energy Champions and have offered to serve as an umbrella to other groups in their region. Their education efforts include influential civic leaders and active organizations that are willing to join the effort.

Energy Champion Facts:

The first group of ECs were trained to participate in the program on May 11, 2011.

There are currently 99 ECs enrolled in the Energy Champion Program.

ECs have successfully secured over 10% of all advanced upgrades completed by homeowners in Los Angeles County, and this number is currently rising.

Over 50% of all Energy Champion upgrades have been completed in the City of Claremont.

An Energy Champion (EC) is an organization that promotes the benefits of a home energy upgrade by educating homeowners about Energy Upgrade California in Los Angeles County. The Energy Champion receives funds for each home energy upgrade completed by a homeowner that they have introduced to the EUCLA Program.

THE ENERGY CHAMPIONS

SUSTAINABLE CLAREMONT – 31 HAFs submitted and 120 HAFs pending

The following are other Energy Champions in the region that Sustainable Claremont encouraged or collaborated with to join the EC Program. These statistics reflect activity through April 2012:

SHEPHERD'S PANTRY – 6 HAFs submitted

SYCAMORE SCHOOL – 5 HAFs submitted

AZUSA PACIFIC UNIVERSITY – 2 HAFs submitted

UNCOMMON GOOD – 1 HAF submitted

PILGRIM PLACE – 120 HAFs are now in the process of being submitted, and their Energy Champion application is in process.

According to Devon Hartman of Sustainable Claremont, "Pilgrim Place residents support our Energy Champion mission wholeheartedly. Not only do they want to live in energy efficient homes and earn incentive funds for Pilgrim Place, but they are also passionate about leaving behind the legacy of a sustainable environment."

Sustainable Claremont wants several nonprofits in the community to be involved in the EC Program for the common good – to encourage each other, to share resources, to extend their reach, and to reinforce the Energy Champion message through as many avenues as possible. This spirit of cooperation and collaboration has been a key factor in the success of Sustainable Claremont.



COLLABORATION WITH THE CITY OF CLAREMONT

City of Trees and PhDs

The Mayor, the City Council, the City Planners, and other influential leaders and active citizens are committed to Energy Upgrade California and are very supportive of the Energy Champion Program. The City has added \$250 in incentive funds to a completed home energy upgrade and has waived all associated permit fees. As of April 2012, residents of Claremont have completed 57 EUCLA home energy upgrades; 45 of these have come from Energy Champions.

“The marketing efforts of Sustainable Claremont and other active Energy Champions are giving added visibility and credibility to our grassroots efforts. What I see as particularly hopeful now is that people are not just asking about getting a new heater or air conditioner, but they are thinking instead about the whole system of the house. We have to be constantly vigilant in informing the public and changing people’s perceptions so that they are thinking about a holistic, Whole House approach. The Energy Champions are helping us bring this message into public awareness. **We see Energy Champions as a win-win-win opportunity.**”

Senior City Planner, Chris Veirs



COLLABORATION WITH CONTRACTORS

Sustainable Claremont and Energy Champions work in partnership with three qualified EUCLA Participating Contractors in the region: Home Performance Matters (HPM), Residential Energy Efficiency Improvement Specialists (REEis), and SolarCity. All have exceptional expertise and high quality standards.

Home Performance Matters has increased their number of employees from 3 to 20 due to the increased demand for their services. So far, they have done 38 home energy upgrades in Los Angeles County in collaboration with Energy Champions.

HPM, REEis, and SolarCity are among the few contracting organizations that are accredited by the Building Performance Institute (BPI) and the Home Performance with Energy Star programs. They are experts in energy upgrades based on building science and the most current technology. They are committed to helping homeowners find the most cost-effective ways to cut down on energy use. The result is that homeowners benefit from lower energy costs, a smaller carbon footprint, and a healthier, safer, and more comfortable home – and the whole community benefits as well.

The Energy Champions share educational resources, marketing, and homeowner leads with these Participating Contractors. Tapping into the expertise and commitment of highly qualified Participating Contractors with high quality standards has been invaluable to the success of Sustainable Claremont.

RECOMMENDATIONS

Following are recommendations to Energy Champions and their partners on promoting the EUCLA program. Each recommendation comes from the experience of what has worked with Sustainable Claremont and how other Energy Champions can learn from this experience.

INSIGHTS FROM CHRIS VEIRS - THE CITY OF CLAREMONT, SENIOR CITY PLANNER

Here are some of the appealing features of the Energy Champion Program that Chris highlighted:

- 1 EUCLA has given a large media presence to the concept of home energy upgrades, and the Energy Champions have provided more visibility and support to this messaging. This cooperation has not only raised awareness of home energy upgrades; it has created a brand that people can trust.
- 2 Extra money is coming into the community through Energy Champions. Additional funding is always a boon to small community-based groups with a mission, like Sustainable Claremont and Sycamore Elementary School.
- 3 People's incentive to do a home energy upgrade is enhanced by being able to raise money for their local nonprofits. People feel good, not only saving energy and money but also doing something worthwhile to benefit their favorite cause or organization.

Chris himself has had a home energy upgrade and is very happy to talk about the positive results – and how quiet his home energy system has become. It is so quiet that he and his wife don't even know when the heating or air conditioning comes on. As he says with a laugh, "No more having to turn up the TV!"

INSIGHTS FROM DAN MONCAYO - HOME PERFORMANCE MATTERS, DIRECTOR OF OPERATIONS

Dan offered many good suggestions from his direct experience:

- 1 It is important to find people in the community who already care about the issue of sustainability and reducing energy waste. This is why Sustainable Claremont is a good fit as an Energy Champion.
- 2 It would be better to link one Energy Champion to one Participating Contractor. Having more than one Participating Contractor at an Energy Champion event doesn't work well, because it creates competition and dilutes the presentation.
- 3 The best leads to new homeowners are word-of-mouth from satisfied homeowners. Nothing beats the in-person testimonial of personal experience from a satisfied customer.

An exceptional feature of Home Performance Matters is their user-friendly website that is informative and educational about the benefits of home energy upgrades. Having a Participating Contractor with a professional, complete, and easy to understand website has been very beneficial to Sustainable Claremont, as well as the other Energy Champions in the region.

INSIGHTS FROM DEVON HARTMAN - SUSTAINABLE CLAREMONT BOARD MEMBER AND CO-FOUNDER OF CHERP

Devon is a former homebuilder, who has been in architecture and construction for 35 years. His insights are very pertinent:

- 1 Devon would like to see CHERP used for education and support by as many Energy Champions as possible. Our goal, says Devon, is wide contact and deep education in the community.
- 2 The training provided by the Energy Champion Program has offered many good ideas and valuable tools, resources, and marketing materials. We have leveraged these and integrated them into our program.
- 3 All Energy Champions need to team up with one or two high quality Participating Contractors who are well educated in building science. Quality control is a big issue pertaining to the contractors; we need to be sure that the community is protected.

Devon's most compelling statement was this: "We need to increase the speed with which we are addressing the climate issue. The more Energy Champions we have, the more outreach and influence to help people save money on home energy, improve the health of their homes, improve the local economy, increase jobs, stem the tide of energy waste, and reduce greenhouse gas emissions. It's imperative."

INSIGHTS FROM SORREL STIELSTRA - SYCAMORE SCHOOL PARENT VOLUNTEER, EUCLA PARTICIPATING HOMEOWNER, AND SUSTAINABLE LIVING AWARD RECIPIENT 2011 FROM SUSTAINABLE CLAREMONT

- 1 The Energy Champion Program has given grassroots organizations like ours the opportunity to do something good for the environment by promoting EUCLA and to earn money, too. **It is a win-win for everyone.**
- 2 The EC Program has also given us good logistical support, especially through a supportive EC staff person, collaboration at events, and great marketing materials.
- 3 With many people and organizations working on the same issue, there is an overlap in the sharing of information, which builds momentum and provides credibility to all of our efforts.

Homeowners see a consistent message about home energy upgrades, because we are collaborating, not competing. The Energy Champions help us focus our efforts all along the way.

INSIGHTS FROM PHIL HUISMAN - SHEPHERD'S PANTRY, DIRECTOR

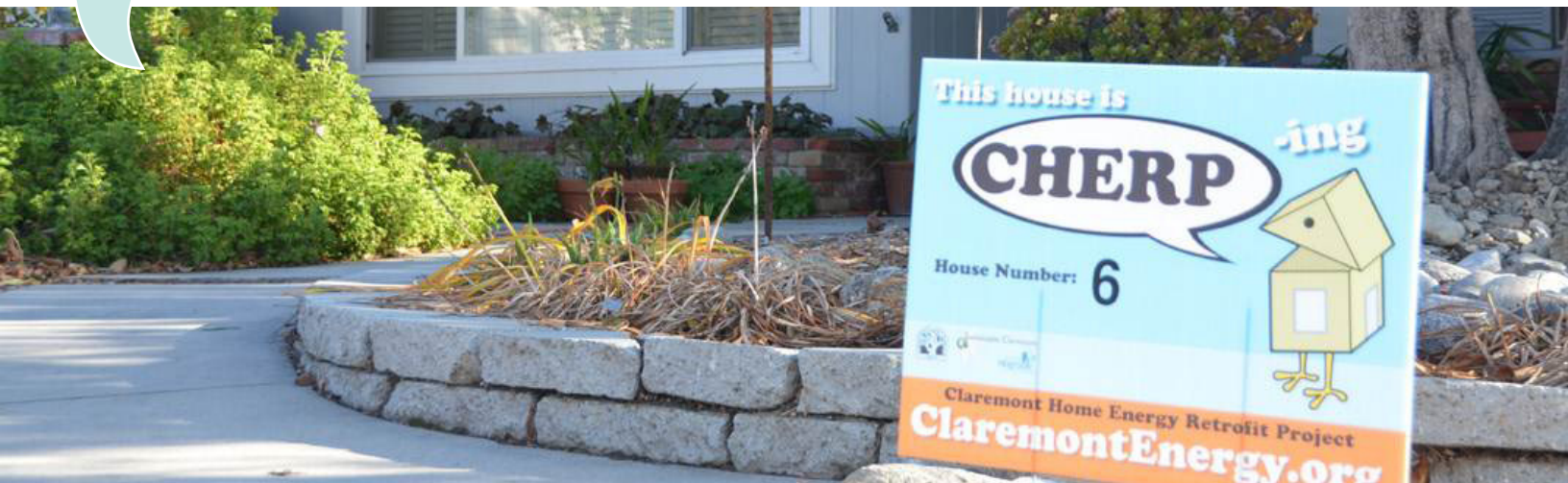
- 1 Being an Energy Champion is a win-win for everyone. Not only do homeowners have the opportunity to participate in helping the environment and to save money over the long run, but they can also help support worthwhile nonprofits like ours.
- 2 The Energy Champion Program is well organized and well executed, and the return on investment for us is excellent.
- 3 Most residents are interested in how they can conserve energy and save on energy bills. The Energy Champion Program has taught us how to bridge the gap between technology and affordability, which is usually the stumbling block.

Since Shepherd's Pantry became an Energy Champion, we have been able to market home energy upgrades to our volunteers, who have then shared it with their friends, neighbors, and families.

INSIGHTS FROM MICHAEL PEEL - UNCOMMON GOOD, DIRECTOR OF DEVELOPMENT

- 1 The Energy Champion Program has given us many quality marketing materials to get the word out to homeowners and to help us make presentations. And the EC staff has been very helpful.
- 2 I would like to see the online HAF process become more user-friendly for the average homeowner.

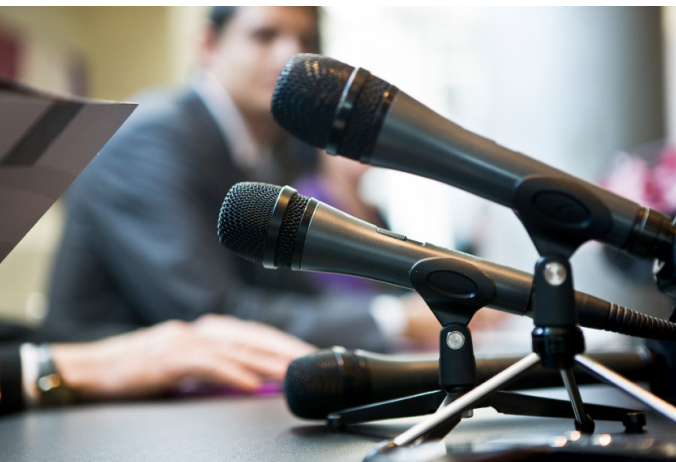
Michael added that he was able to utilize the EC/EUCLA Program as a component of Uncommon Good's larger green jobs program.



CONTRIBUTIONS OF THE ENERGY CHAMPION SUPPORT TEAM

Here is a list of the work that the Energy Champion Support Team engaged in on behalf of individual Energy Champions and EUCLA:

- Recruited and trained the EC organizations
- Supplied each EC with educational materials, including the 60-page “Energy Champion Training Guide”, designed to be a simple, straightforward reference guide and tangible resource for promotions of the EUCLA program to homeowners. This guide included materials such as:
 - EC and EUCLA fact sheets and talking points
 - Suggestions for outreach and promotional activities
 - A checklist for event preparation
 - A copy of the Homeowner Action Form (HAF)
 - An illustrated guide to the Online Resource Library
- Helped ECs plan their own marketing; attended planning meetings; devised strategies for both grassroots and grasstops outreach; met with Board members and influential community leaders
- Made presentations and assisted at special events
- Kept the ECs informed of all advertising and publicity featured in their area
- Kept ECs updated on changes to the EC and the EUCLA programs
- Supplied ECs with all of the most current marketing materials, including:



- The co-branded customizable EC brochures
- PowerPoint presentations for homeowner engagement
- EUCLA branded pop-up tents and tablecloths for events
- EUCLA brochures, banners, and customized signage
- The opportunity to have the Road Show presentation appear at very special events



Here are just a few of the promotional activities that Sustainable Claremont worked on in collaboration with The City, Participating Contractors, and fellow ECs:

- ➔ A publicized event where the Mayor of Claremont handed out \$250 checks to homeowners who had completed home energy upgrades.
- ➔ The 2012 Earth Day Celebration, where ECs set up tented booths and engaged homeowners with information on EUCLA and home energy upgrades.
- ➔ A Road Show presentation highlighting a newly completed energy upgrade home. The Road Show featured the EUCLA van and a colorful display with tent, signage, and flyers. Sustainable Claremont had a table set up with EUCLA brochures, coupons for home energy audits, and a sign-up list for a call from a Participating Contractor. Senior City Planner Chris Veirs attended and said that the presentation was very professional.

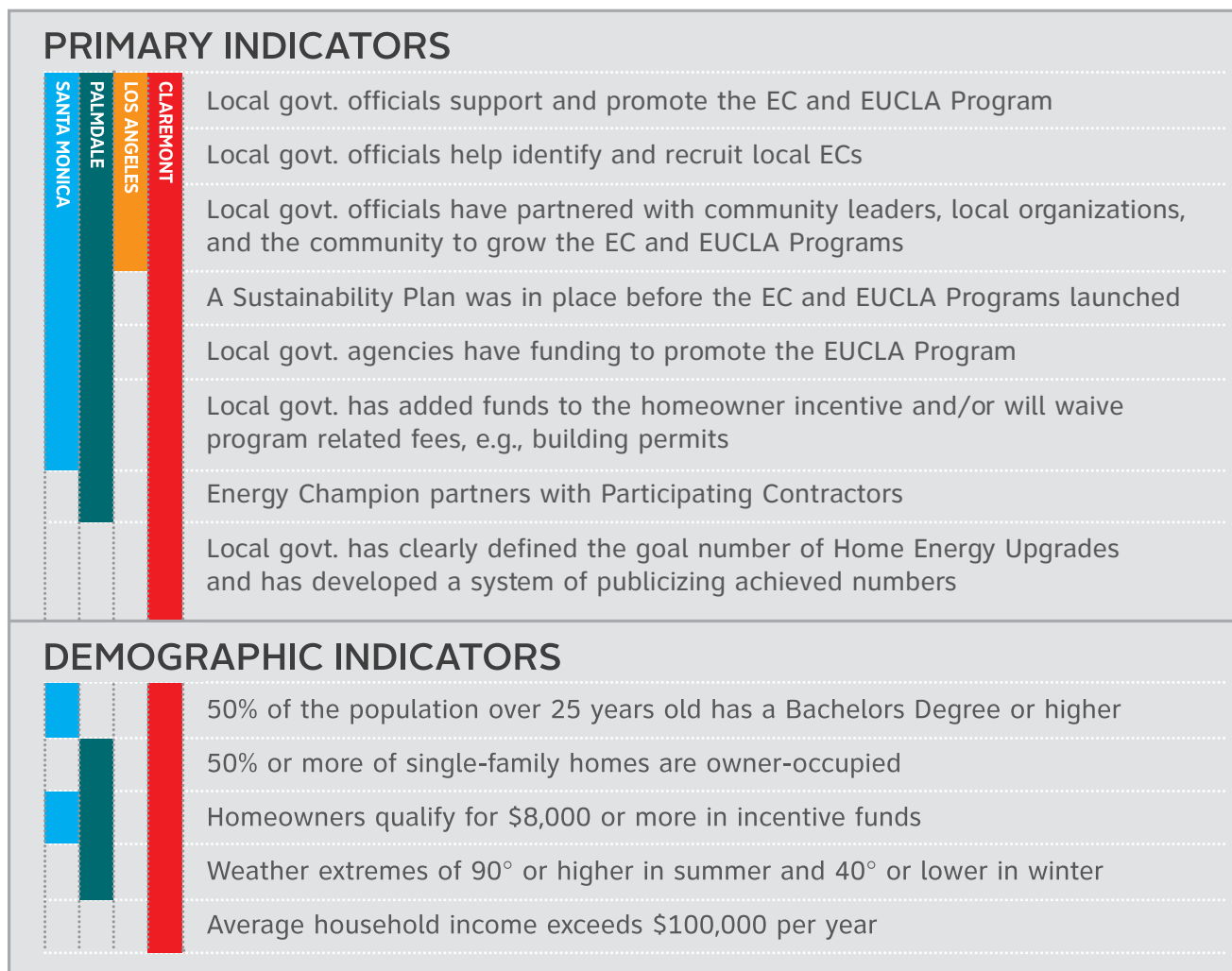


KEY INDICATORS OF SUCCESS

After reviewing the information provided by our resources, as well as available demographic, geographic, and socio economic data, it is possible to identify Key Indicators that contributed to the success of the Energy Champions.

This graph

- 1) identifies all of the Key Indicators that have contributed to the success of the Energy Champion program and
- 2) is designed to be used as a tool to compare how many of the same Key Indicators exist, or have been implemented, in a sampling of other geographic regions.



THE TOOL IN ACTION –

THE CITY OF LOS ANGELES – 136 Energy Upgrades, 3 from Energy Champions

Population – 3,792,621



The City of Los Angeles does not have many of the Primary or Demographic Indicators appearing on the graph.

Possible solutions based on the absent indicators –

1. Identify those neighborhoods in The City that meet all of the Primary and Demographic Indicators
2. Establish partnerships between ECs and local Participating Contractors
3. Enlist the support of a City government official to promote the program
4. Build public momentum by clearly defining a target number of homes for participation, and publicize the achieved numbers, using methods such as Claremont's high-profile yard signs and the media
5. Restructure the rebates and incentives so that all homeowners in The City can qualify for the same maximum funds as the rest of The County

PALMDALE – 24 Energy Upgrades, 0 from Energy Champions

Population – 152,750



The City of Palmdale meets 10 of the 13 indicators for success, and yet it has a very low number of participation in both the EC and the EUCLA Programs.

Possible solutions based on the absent indicators –

1. Concentrate efforts in neighborhoods that have the highest average income per household
2. Establish partnerships between ECs and local Participating Contractors
3. Build public momentum by clearly defining a target number of homes for participation, and publicize the achieved numbers, using methods such as Claremont's high-profile yard signs and the media

SANTA MONICA – 11 Energy Upgrades, 6 from Energy Champions

Population – 89,736



Santa Monica meets 8 of the 13 indicators for success. City officials and ECs are knowledgeable and committed to both the EC and the EUCLA Programs, and homeowners are already committed to sustainable living. Many homeowners, however, have already made substantial upgrades to their homes and may not qualify for an EUCLA advanced or basic upgrade.

Possible solutions based on the absent indicators –

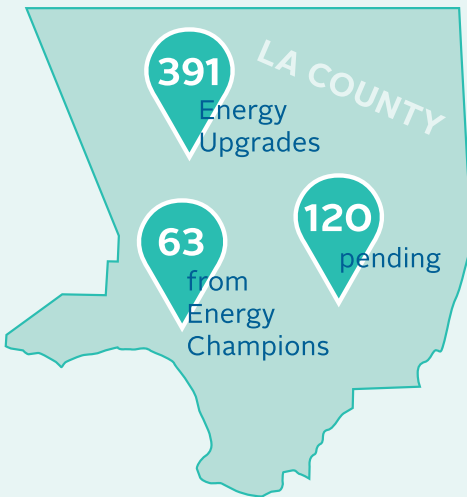
1. Concentrate efforts in neighborhoods that have the highest average income per household
2. Establish partnerships between ECs and local Participating Contractors
3. Build public momentum by clearly defining a target number of homes for participation, and publicize the achieved numbers, using methods such as Claremont’s high-profile yard signs and the media

Please note: Most ECs interviewed while compiling information for this case study claimed little or no knowledge of the “Flex Path Program” and have no collateral to promote it within their communities. One major recommendation is to raise the incentive funds that ECs receive for enrolling homeowners in the Flex Plan Program.

Claremont, their partners, and support networks have established clear, quantifiable methods for success that are worth replicating throughout Los Angeles County. All involved agree that building awareness of the benefits of home energy upgrades, and encouraging homeowners to take action and participate in EUCLA, is an ongoing process that definitely produces results over time.

THE BIG PICTURE

AS OF MAY 1, 2012:



Of the **391** countywide EUCLA Energy Upgrade applications submitted:

16.1% have come from Energy Champions. Of those, **65%** have come from Energy Champions in Claremont.

SPECIAL NOTE: Pilgrim Place in Claremont is already committed to submitting **120 HAFs** so far, which would change the overall numbers to the following:

Of the **391** countywide applications submitted:

46.8% will have come from Energy Champions. Of those, **90.2%** will have come from Energy Champions in Claremont alone.

As Claremont Senior City Planner Chris Veirs says,
Energy Champion is a WIN, WIN, WIN opportunity!

When references are made to the EC and EUCLA Programs, we are referring to the Basic or Advanced Energy Upgrade.

RESOURCES

Chris Veirs, City of Claremont, Senior City Planner

Dan Moncayo, Home Performance Matters, Director of Operations

Devon Hartman, Sustainable Claremont Board Member and Co-Founder of CHERP

Sorrel Stielstra, Sycamore School Parent Volunteer

Phil Huisman, Shepherd's Pantry, Director

Michael Peel, Uncommon Good, Director of Development

2010 US Census

Master Dashboard Report_050812

Created by the team at

