

## ENERGY STAR for Homes® Utility Sponsor Best Practice Checklist

[See notes on back side]

A. Program Design		Barriers
<input type="checkbox"/>	<b>A.1</b> Consider most effective program incentives (e.g., effective strategies in similar markets)	High Cost
<input type="checkbox"/>	<b>A.2</b> Develop training for builders on how to sell the value of energy-efficient homes	
<input type="checkbox"/>	<b>A.3</b> Set aside funding for consumer education	Consumer Demand
<input type="checkbox"/>	<b>A.4</b> Choose the most effective options for educating consumers (e.g., consumer research)	
<input type="checkbox"/>	<b>A.5</b> Develop builder sales training	Lack of Sales Skills
<input type="checkbox"/>	<b>A.6</b> Develop train-the-trainer for sales programs	
<input type="checkbox"/>	<b>A.7</b> Develop point-of-sale materials/templates (e.g., displays, fact sheets, owner manuals)	
<input type="checkbox"/>	<b>A.8</b> Create an effective 'value' message for recruiting builders	Resistance to Change
<input type="checkbox"/>	<b>A.9</b> Consider incentives matched to business priorities (e.g., linked to sales staff)	
<input type="checkbox"/>	<b>A.10</b> Incorporate partner recognition (e.g., awards, advertising, PR, builder listing)	
<input type="checkbox"/>	<b>A.11</b> Develop local HERS infrastructure	Technical Infrastructure
<input type="checkbox"/>	<b>A.12</b> Develop technical support (e.g., reference materials, how-to guides)	
<input type="checkbox"/>	<b>A.13</b> Develop train-the-trainer for technical subjects	
B. Marketing and Implementation		Barriers
<input type="checkbox"/>	<b>B.1</b> Provide and promote incentives, but allocate significant resources for marketing	High Cost
<input type="checkbox"/>	<b>B.2</b> Consider incentives for model homes promoting the ENERGY STAR brand	
<input type="checkbox"/>	<b>B.3</b> Provide funding for builders to educate consumers (e.g., cooperative advertising)	Consumer Demand
<input type="checkbox"/>	<b>B.4</b> Educate consumers on ES value (e.g., PR, Adv., Web, ES Outreach Campaign)	
<input type="checkbox"/>	<b>B.5</b> Link incentives to consumer targeted events (e.g., Parade of Homes)	
<input type="checkbox"/>	<b>B.6</b> Develop consumer testimonials	
<input type="checkbox"/>	<b>B.7</b> When growth is sufficient, integrate ENERGY STAR into regional MLS	
<input type="checkbox"/>	<b>B.8</b> Provide training for appraisers and lenders	
<input type="checkbox"/>	<b>B.9</b> Cross market with other ENERGY STAR qualified products	
<input type="checkbox"/>	<b>B.10</b> Provide builder sales agent/real estate agent training	Sales Skills
<input type="checkbox"/>	<b>B.11</b> Provide guidance on how to use available marketing tools	
<input type="checkbox"/>	<b>B.12</b> Provide train-the-trainer for sales training	
<input type="checkbox"/>	<b>B.13</b> Promote the ENERGY STAR Marketing Toolkit	
<input type="checkbox"/>	<b>B.14</b> Provide builders ENERGY STAR homeowner's manual template or insert information	Resistance to Change
<input type="checkbox"/>	<b>B.15</b> Consistently and effectively convey the 'value' message	
<input type="checkbox"/>	<b>B.16</b> Provide partner recognition (e.g., awards, program Web site listing, advertisements)	
<input type="checkbox"/>	<b>B.17</b> Publish articles in local HBA newsletter	
<input type="checkbox"/>	<b>B.18</b> Provide performance feedback to builders	
<input type="checkbox"/>	<b>B.19</b> Sponsor ENERGY STAR events	
<input type="checkbox"/>	<b>B.20</b> Promote successful builders in order to attract their competitors	Technical Infrastructure
<input type="checkbox"/>	<b>B.21</b> Recruit/nurture HERS infrastructure	
<input type="checkbox"/>	<b>B.22</b> Look for opportunities to facilitate a regional HERS association	
<input type="checkbox"/>	<b>B.23</b> Provide tight QA/QC for HERS verification	
<input type="checkbox"/>	<b>B.24</b> Provide ongoing technical support	
<input type="checkbox"/>	<b>B.25</b> Provide train-the-trainer for technical training	
C. Evaluation		Barriers
<input type="checkbox"/>	<b>C.1</b> Conduct utility billing analyses to establish baseline energy costs and energy savings	High Cost
<input type="checkbox"/>	<b>C.2</b> Evaluate actual peak-demand reduction	
<input type="checkbox"/>	<b>C.3</b> Conduct homeowner surveys	Consumer Demand
<input type="checkbox"/>	<b>C.4</b> Measure impact of all marketing efforts	
<input type="checkbox"/>	<b>C.5</b> Monitor frequency and types of homeowner complaints	Sales Skills
<input type="checkbox"/>	<b>C.6</b> Monitor effectiveness of all sales training	
<input type="checkbox"/>	<b>C.7</b> Monitor effectiveness of sales/marketing tools	Resistance to Change
<input type="checkbox"/>	<b>C.8</b> Track program data (e.g., number of labeled homes, builder partners, HERS raters)	
<input type="checkbox"/>	<b>C.9</b> Conduct builder surveys to measure satisfaction and identify most useful tools	Technical Infrastructure
<input type="checkbox"/>	<b>C.10</b> Evaluate integrity of the HERS process	
<input type="checkbox"/>	<b>C.11</b> Evaluate delivery of key technical measures (e.g., tight ducts, TBC, proper insulation)	

## ENERGY STAR Qualified Homes<sup>®</sup> Utility Sponsor Best Practice Checklist

### What is the Best Practice Checklist?

This checklist represents a comprehensive set of actions considered highly effective for an ENERGY STAR Qualified Homes program administered by a utility or state sponsor. The actions are broken down into three major phases of program administration: Program Design, Marketing and Implementation, and Evaluation. While there is no guarantee for success, utilizing appropriate actions from this checklist is an effective way to leverage experience and lessons learned from a diverse group of sponsors and EPA.

### How Was the Checklist Derived?

The best practice checklist was developed through an intensive two-day facilitated meeting with a large group of utility and state sponsors actively planning or implementing an ENERGY STAR Qualified Homes program. Additional content was provided based on EPA experience working with sponsors across the country. A key outcome of the facilitated meeting was a list of critical barriers that need to be addressed for successful programs. The final checklist was developed to make sure proven actions are included for each major phase of program administration that effectively addresses each of these barriers.

### What Are Recommended Uses of the Checklist?

This checklist is an excellent tool for utility and state sponsors planning a new ENERGY STAR Qualified Homes program or seeking to improve an existing program. For those in the planning process, the checklist provides an excellent tool for ensuring that effective program actions are incorporated into design, implementation, and evaluation. For those implementing a program, the list provides an excellent tool to benchmark their programs and to make improvements by adding to, modifying, or ceasing existing actions. Simply check those actions of most interest including those that most directly address high-priority barriers identified for your program area.

### Where is More Information Available?

Anyone interested or currently working with ENERGY STAR Qualified Homes should consult the web site ([www.energystar.gov/homes](http://www.energystar.gov/homes)) for more information. This includes a more detailed Utility and State Sponsor Best Practice Guide that was the basis for the one-page checklist. The guide includes background information on the program, lessons learned, best practices, and case studies applying the best practices. A broad array of technical information, presentations, and marketing resources are also available on this web site. And lastly, the web site includes a 'Partner Locator' tool that can be used to find lists of builder, HERS raters, and sponsor partners working with ENERGY STAR Qualified Homes.