

# Increasing Demand for Home Retrofits: Community-Based Outreach and Mobilization

The benefits of retrofitting U.S. homes to make them more energy efficient are many: long-term savings for consumers through lower utility bills; increased comfort and home values; new high-quality, career-track jobs in construction for American workers (especially those from underserved communities); business opportunities for companies that perform retrofits and for those that provide the materials that retrofits require; a reduction in both energy consumption and the emissions that contribute to pollution and global warming. But even though these highly beneficial retrofits pay for themselves over time and provide direct benefits to homeowners, relatively few people retrofit their homes. The reasons for this include high upfront costs and a general lack of trusted information about what retrofits are, why they are beneficial, and how to get them.

An increasing number of government and utility programs are working to reduce or eliminate the upfront costs of home energy retrofits. But, by themselves, these programs will not be enough to generate large-scale demand for home retrofits among the tens of millions of U.S. homeowners that could and should benefit from such retrofits. Case in point: in 2007, the approximately 150 energy-efficiency loan programs in the U.S. reached less than 0.1% of their potential customers.<sup>1</sup>

To grow this promising part of the green economy, efforts to overcome *financial* barriers must be combined with efforts to overcome *information* barriers. This is where community-based outreach and mobilization come in.

Community-based outreach can effectively reach potential home-retrofit customers with information about the benefits of retrofits and the process of getting them done. Community-based outreach is often more effective than traditional marketing approaches. It uses trusted information channels, like neighborhood associations, PTAs, or churches. It delivers information through face-to-face



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<sup>1</sup> Merrian Fuller. "Enabling Investments in Energy Efficiency: A Study of Programs that Eliminate First Cost Barriers for the Residential Sector." May 2009. <http://uc-ciee.org/energyeff/documents/resfinancing.pdf>

interactions, often from people that consumers already know. It generates momentum and enthusiasm by emphasizing the fact that others in the neighborhood are retrofitting their homes.

Community-based outreach and mobilization not only can increase demand for retrofits by overcoming information barriers; they can also generate other desirable social, environmental, and economic outcomes. For example, by aggregating demand and bundling individual home retrofits into larger projects, these approaches can achieve efficiencies like bulk purchasing and minimizing the time spent transporting crews and equipment among dispersed properties. These approaches can also direct retrofit incentives and financing to lower-income communities that might not otherwise take advantage of them. And they can position community-based organizations to play a central role in driving green economic development in their communities — guiding investments, partnering with businesses, connecting residents to jobs and careers, and shaping policy.

This Best Practice Brief lays out some key elements of community-based outreach efforts and presents some short examples from across the country.

## FIVE KEY ELEMENTS OF COMMUNITY-BASED MOBILIZATION FOR HOME RETROFITS

### *Map Options and Create a Retrofit Completion Pathway*

Launching a community-outreach effort requires a thorough understanding of the retrofit options available to homeowners. It can be very useful to create a map showing how a homeowner will move from first contact with a community outreach worker to getting an audit (initial assessment of a building's energy-efficiency needs and opportunities), accessing loans, taking advantage of rebates or incentives, and connecting with a high-quality contractor to finish the retrofit.

Some cities and utilities have established retrofit programs that provide loans to homeowners to eliminate their upfront costs. If an outreach effort plans to drive homeowners into such programs, community leaders must coordinate with those programs. It will be important to understand how the program interacts with homeowners and who is eligible to participate. In this situation, community organizers will become “the face” of the retrofit program. They need to build on the program's marketing strategy and be able to represent it accurately.

Even in cities that do not offer such retrofit programs, a variety of local, state, and federal incentives may be available to homeowners. Community outreach leaders need to understand these incentives and be able to explain them in a comprehensive and easy-to-understand way. Community outreach efforts may also want to identify home improvement loans that are available at local banks.

In all cases, community outreach efforts need to have close working relationships with the contractors that will be conducting the audits and retrofits. Before the effort gets underway, community leaders may want to enter formal agreements with contractors wherein the

community group commits to delivering a certain number of interested homeowners to the contractor, and the contractor commits to conducting audits and retrofits in a timely way. Community groups might also ask contractors to commit to paying good wages, hiring local workers, or paying a service fee in exchange for the outreach and demand-generation services a community-based effort will provide.

### *Engage Organizations with a Community Base*

Existing networks and membership bases give local organizations a strong foundation on which to build effective outreach and engagement programs. Faith groups, trade unions, educational institutions, nonprofit organizations, and community associations have established visibility, recognition, and trust with local residents.

These organizations can provide volunteer canvassers, organize community meetings, disseminate information through regular newsletters, and help develop relevant messaging based on connections with local members. Perhaps most importantly, community organizations can facilitate peer-to-peer conversations about why improving energy performance matters and how it can benefit homeowners and communities.

### *Target Communities for Outreach*

The concentrated presence of pre-existing networks and relationships is an important consideration in choosing which neighborhoods or communities to target for outreach. Outreach efforts can target groups of homeowners based on geographic location or based on social networks and relationships. For example, all church members may not live in the same neighborhood, but getting a large congregation to sign up for retrofits may be a formula for success.

Community organizers may consider factors such as income, rate of home ownership, and age of homes in selecting neighborhoods or even individual houses that make the most sense for their campaign. Collecting and analyzing data on the front end will allow outreach workers to focus their time and resources on communicating with homeowners that are likely to follow through on getting retrofits.

### *Enlisting Program Participants*

A number of techniques are effective in mobilizing residents to participate in energy-efficiency retrofit programs. The key is to facilitate face-to-face — and in some cases neighbor-to-neighbor — conversations between outreach workers and prospective program participants. Examples include door-to-door canvassing, house meetings, and outreach at farmers markets and community events. Community newsletters, e-mail lists, and social networking websites (e.g., Facebook, Yelp) can also generate interest.

To effectively educate residents about energy efficiency, answer their questions, gauge their interest, and ultimately move them to sign up for a retrofit, community outreach efforts must build relationships with them. Though often underappreciated, this can make or break an efficiency program. Good relationships make outreach workers effective messengers.

The outreach process depends not only on effective messengers but also on compelling messages. Outreach workers should be trained on the nuts and bolts of the relevant energy-efficiency program(s), including the overall process, the types of retrofit measures available, average cost of retrofitting comparable homes, financing options, any applicable rebates and tax credits, contractors, etc. They should also be able to describe the multiple benefits of participation, such as cost savings through reduced energy bills, improved comfort in homes, reduced environmental impacts from energy consumption, increased energy independence, and local job creation. Which of these benefits is most attractive may vary based on differences between audiences (e.g., education, income) and circumstances (e.g., social context, season); message selection may shift depending on these factors. Market research and focus groups can inform messaging choices.

Residents are most motivated to get retrofits if they learn that others in their neighborhood have signed up for or completed the program. This makes it important to enlist people who have retrofitted their homes as messengers and validators. Other possible messengers include contractors, energy assessors, utility representatives, local government representatives, workers, and community leaders. Organizations and institutions with in-home services (e.g., foster-care, hospitals, meals on wheels, etc.) can also be good allies and messengers, particularly when integrating messages on how to make a home not only more energy efficient but also healthier and safer.<sup>2</sup>

Throughout the outreach process, community organizations should track data about their efforts so that they can measure success and identify ways to improve. This requires developing metrics to track both outreach (e.g., number of doors knocked on, messages employed, level of interest, questions asked, number of follow-up phone calls, number of attendees at energy meetings or house meetings, number of households connected with local green contracting businesses) and results (e.g., number of audits completed, number of retrofits completed, amount of funds mobilized, number of jobs created). Organizations may want to also gather data on volunteer relationships, organizational relationships, and media relationships.

Once a homeowner has signed up for the retrofit program, a member of the campaign may want to stay in contact with the homeowner. The outreach worker can help to answer questions and ensure that the process is smooth and that the homeowner is satisfied; satisfied homeowners can be excellent advocates for the program or references for others.

### *Bundling Audits and Retrofits*

A community outreach effort may be able to bundle multiple home retrofits into larger projects for a contractor or group of contractors, depending on the retrofit program it is working with. Generating and aggregating (bundling) demand for retrofits is a valuable service that community groups can offer to contractors in exchange for better rates, service fees that support community outreach campaigns, and business practices that speak to

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<sup>2</sup> At a pilot site of the Green and Healthy Homes Initiative, the Baltimore Neighborhood Energy Challenge and the Coalition to End Childhood Lead Poisoning are two of a half dozen local partners that generate demand for and deliver an integrated retrofit addressing indoor air quality (mold, pests, lead), safety (child proofing, loose railings, smoke detectors), and energy efficiency. <http://www.ghhi.org>

community values and interests — such as hiring locally, paying good wages, or using local sub-contractors.

To offer bundled properties, community outreach initiatives can put these blocks of requested work out to bid and establish criteria for qualified contractors. Alternatively, they can negotiate agreements with specific contractors — including nonprofit social enterprises — and then generate and aggregate demand to fulfill those agreements. Some community organizations may even choose to operate as a nonprofit general contractor, managing the process of service delivery from start to finish — from pre-audit evaluation, to energy audit, to consultation with customers about options and financing, to providing equipment to subcontractors, to overseeing installations by subcontractors, to billing, to inspection.

## MINI CASE STUDIES

### *The DC Project's WeatherizeDC Campaign*

The DC Project is a national nonprofit organization delivering training and technical assistance to city and state retrofit initiatives prioritizing high-road job creation in the efficiency sector. Founded in January 2009, The DC Project has been applying its cutting-edge organizing tools and tactics to mobilize community interest through WeatherizeDC, its anchor initiative.

Currently unable to offer financing to consumers,<sup>3</sup> WeatherizeDC targets neighborhoods with a high rate of homeownership and relatively high median income. WeatherizeDC focuses on building relationships with residents through door-to-door canvassing. Volunteers and organizers highlight four primary opportunities: energy savings, personal comfort, job creation, and reducing carbon emissions. They then direct anyone interested to an upcoming house meeting hosted by a neighbor who has previously been a part of the program. These hosts speak from experience about what it took to weatherize their homes.

WeatherizeDC has found that people who share their experiences about participating in the program are effective local validators for their neighbors. They are best positioned to communicate the benefits of participating in the program and can effectively spur others to join. WeatherizeDC also convenes community energy meetings at community venues or other public spaces, and tables at community events to facilitate meaningful, face-to-face conversations about the program. WeatherizeDC couples these offline organizing tactics with an active presence on online social networking sites and uses its own website as a central digital meeting space.

WeatherizeDC refers interested homeowners to one of their contractor partners, who then follows up directly to schedule audits and retrofits. As of April 2010, Weatherize DC is producing a 58% conversion rate (the percentage of those who sign up for the program that see the process through to getting their homes retrofitted). Throughout the process, The DC Project serves as a consumer advocate; it ensures that program participants have a primary

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<sup>3</sup> The DC Project is working to pair its demand-creation methods with sustainable financing mechanisms so that WeatherizeDC can target a broader range of communities.

contact throughout the process, and in the rare cases where grievances with contractors arise, helps resolve them.

To support the WeatherizeDC initiative, The DC Project has established an agreement governing the roles and duties of the diverse set of partners involved. The DC Project provides its contractors with new business leads; in return, the contractors meet specific social equity requirements on local hiring, certification-based training, livable wages, and benefits. Faith-based and pre-employment organizations recruit trainees for designated training programs (including the Laborers' International Union of North America's weatherization training program), and participating home-performance contractors hire all new weatherization workers from those training programs.

WeatherizeDC's robust data-tracking system informs outreach strategies, monitors performance, and provides information that helps the program continually improve its efficiency and effectiveness. Even without financial incentives for homeowners in Washington, DC, the program has proven that community engagement can transform the market in the home-performance industry and has begun creating full-time jobs.

### *Community Labor United (Massachusetts)*

Community Labor United (CLU), a Massachusetts nonprofit, believes that lower-income communities and communities of color that have been overburdened by the dirty fossil fuel economy must be at the forefront of new green opportunities, and that a sustainable economy must be as equitable as it is green. It seeks to achieve this by involving base-building community organizations, and their members and leaders, in building momentum, excitement, and buzz in their communities about these new green opportunities.

CLU convenes the Green Justice Coalition (GJC), a statewide partnership of more than 40 community organizations, labor unions, environmental groups, and faith-based groups working with the national Apollo Alliance to build support for the state's move towards an environmentally and economically sustainable green economy. Thanks to the Green Justice Coalition, Massachusetts and the local utility companies have committed to launching pilot "Community Mobilization Initiatives" (CMIs) in several regions of the state. These CMIs will use a community organizing approach to delivering energy-efficiency work. These pilot initiatives are a novel approach to achieving large-scale energy efficiency work, relying on partnerships among community organizations with longstanding relationships in working class communities and on responsible contractors who are committed to providing livable wages, benefits, and career pathways for local workers.

The Chinatown Community Mobilization Initiative, for example, is designed to overcome multiple challenges — language barriers, a high concentration of renters in multi-family buildings, high unemployment rates, and low home ownership rates — that make Chinatown one of the hardest neighborhoods for utility-based energy-efficiency programs to reach. The Chinese Progressive Association (CPA) is the Initiative's lead community base-building partner. With more than 30 years of experience working to improve living and working conditions in the Chinese community and involve ordinary people in decision-making, CPA has deep community roots in Boston's Chinatown (as evidenced by CPA's paid membership and support base of approximately 2,000 families). CPA's role in the Chinatown CMI is to coordinate initial outreach and education on energy efficiency; organize other groups on the ground to support the work; and bundle residential homes,

multi-unit buildings, and small businesses interested in implementing energy-efficiency measures. CPA is going door-to-door and drawing from its networks to perform this outreach and bundling work.

CPA is also teaming up with the International Union of Painters and Allied Trades DC 35 (IUPAT DC35) to launch a collaborative workforce development program called Chinatown Green Collar Pathways. This program will provide a bilingual weatherization training program accompanied by workplace English proficiency training. Graduates will be eligible for immediate hire by the Chinatown CMI's participating general contractor to work on CMI projects. They will work as IUPAT DC35 weatherization pre-apprentices on job teams led by bilingual team captains. Weatherization pre-apprentices will be eligible to apply, with membership priority rights, to the IUPAT DC35 three-year apprenticeship, further developing their skills in painting and drywall or glass and glazing.

### *SustainableWorks (Washington)*

SustainableWorks is a nonprofit general contractor in Washington State. Its goal is to create quality jobs by performing energy efficiency retrofits on 1800 Washington homes. This will save 11 million pounds of carbon per year, save \$1,160,000 in energy bills per year, and create 125 high-quality, full-time jobs. SustainableWorks partners with the Sound Alliance and Spokane Alliance to manage the entire service delivery process, from community organizing, to auditing, to installation, to inspection. SustainableWorks uses a neighborhood organizing model that results in geographically focused work, reduced costs for customers, and high labor standards for workers.

In each neighborhood, SustainableWorks targets 200 homes over four months. It targets neighborhoods where its partner organizations<sup>4</sup> have members, where households are moderate income (60–80% of mean income), where the homes were built prior to 1982 (i.e., before energy-efficient state building codes were established), and where a high percentage of residents own their homes. Once it has identified a target neighborhood, SustainableWorks recruits demonstration homes that will serve as models of the improvements the program makes and the savings those improvements achieve. Neighborhood organizing is driven by community organizers and supported by a volunteer force from the Sound Alliance. Volunteer Block Organizers go door to door providing homeowners with information about the benefits of energy efficiency and driving demand for audits that lead to retrofits. Block organizers also mobilize residents to get involved at house meetings that they organize on each block.

SustainableWorks schedules audits with interested homeowners. It then sends energy consultants to meet directly with homeowners to interpret the completed audits, further explain the program, and present opportunities for energy savings, financing, and tax incentives. Auditors work in teams of two. Each team aims to perform one or two comprehensive audits every day. Altogether, the auditors perform 220 audits in about three months. At the time of audit, SustainableWorks also conducts a direct install program in which electrical and plumbing apprentices install efficient light bulbs, showerheads, and faucet aerators.

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<sup>4</sup> These local and regional partners include faith organizations, nonprofit organizations, trade unions, educational institutions, local municipalities, and utilities.

When the audits are completed, SustainableWorks bundles projects into lots of 20 for bidding. Contractors must pay prevailing wages, participate in a SustainableWorks training program about home energy performance, and hire pre-apprentice graduates from partner programs like the Seattle Vocational Institute, Got Green, and Helmets to Hard Hats. SustainableWorks requires that 20% of installers be apprentices, and that 25% of those be first-year apprentices. By bundling projects and operating as the general contractor, SustainableWorks achieves high economies of scale. Savings from centralized marketing and sales, reduced travel time, and reduced equipment prices have resulted in bids that are 30% lower than comparable bids for individual, unbundled services.

## CONCLUSION

Community-based outreach and mobilization can help America finally realize the benefits of retrofitting its buildings by achieving the deep market penetration that has eluded utility and government-sponsored efficiency programs. By using effective messages and messengers to leverage existing networks and relationships, community organizations can make concepts like “home performance” as commonly understood as “childproofing” and “remodeling.” At the same time, community-based efforts can provide meaningful access to the economic and social benefits of retrofitting to those who have previously benefited the least. Whether operating in government, business, community-based organizations, or other sectors, those interested in generating demand for home retrofits would be well served to incorporate a community-based mobilization approach to their efforts.

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For a full list of reports and research focused on this topic, visit:

<http://www.greenforall.org/retrofitting-resources>

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