

CHANGING THE CLIMATE IN CULLY:

Driving Demand for Energy Efficient Home Retrofits through Community-based Organizing

Changing the Climate in Cully was an innovative, community-based organizing campaign to recruit homeowners from the Cully neighborhood of northeast Portland to participate in home energy efficiency assessments and upgrades. The campaign was a pilot phase of the Clean Energy Works Portland (CEWP) program and was tasked with delivering 20% of the 500 retrofits completed under Clean Energy Works Portland. The experiences and lessons learned in Cully can provide valuable lessons to similar efforts in building demand using community-based organizing, and can inform and create a scalable model for city- and statewide levels.

Clean Energy Works Portland: Program Overview & Defining Characteristics

Clean Energy Works Portland is a pilot program established by the City of Portland to help 500 qualified homes finance and install energy efficient upgrades. The pilot offers homeowners access to low-cost financing for energy efficient home improvements and retrofits and removes all up-front costs.

In order to qualify for the pilot program, homes must be a single-family, site-built, owner-occupied unit that was built before 1993. The owner must have lived in the home for at least twelve months, and use either electric heat provided from Pacific Power or Portland General Electric, or natural gas from NW Natural. Interested homeowners must have a strong history of utility payments, and pass a routine credit check.

One of the greatest aspects of the CEWP program is on-bill repayment. Participating homeowners pay nothing until after their home improvements are completed, when a low monthly payment is added to their heating utility bill. Loans are available on 20-year terms, at rates of 3.99% for income-qualified participants, and 5.99% for all other homeowners. To date, the average loan amount is around \$12,000.

Homeowners are able to sign up for an initial home energy assessment by filling out an application on the CEWP website. Each application is evaluated against the programs underwriting criteria by Enterprise Cascadia, who determines the homeowner's financial eligibility by checking utility payment history and credit worthiness. If the home is approved, CEWP staff schedule a home energy assessment and provide the homeowner with a pre-approved contractor and an "Energy Advocate" to walk them through the energy assessment,



financing, and installation process. Once the assessment is complete, the homeowner approves the contractor's bid and the work is completed.

A defining characteristic of Clean Energy Works Portland is the program's Community Workforce Agreement. The Agreement establishes a set of contracting, training, and employment policies to ensure high-quality work, high-quality jobs, and career opportunities for minority, women and other historically underserved populations. As a result, the benefits of the retrofits extended far beyond simple home improvements and energy savings—the retrofits helped to create local jobs and stimulate the neighborhood's economy.

Phase V: The "Neighborhood" Phase

In the spring of 2010, CEWP issued a Request for Proposals seeking applications from parties interested in running "Phase V." Applicants for Phase V would be required to deliver up to 143 Home Performance with Energy Star home energy assessments, leading to 100 full home retrofits. The winning proposer would be given a grant of \$20,000 to conduct the necessary outreach and marketing. Once an interested homeowner had successfully filled out an application, CEWP conducted the energy assessment and managed the financing process. In the last step, partner contractors would complete all retrofit work.

Changing the Climate in Cully: a community proposal

In early June 2010, the Phase V pilot was awarded to a coalition of groups led by the Metropolitan Alliance for Common Good (MACG). Key local partners included the Laborers International Union of North America, Cully Association of Neighbors, St. Charles Catholic Church, Verde Inc., Native American Youth & Family Center, and the local chapter of the Sierra Club.

MACG and its partners developed a comprehensive community-based organizing campaign that focused on delivering personalized messages to homeowners in the Cully neighborhood utilizing community meetings, door-to-door canvassing, phone calls, and other visibility and grassroots marketing efforts. Although a diverse group of individuals and organizations contributed to the program's success, the campaign was driven by MACG's Sustainable Jobs Action Team, co-chaired by representatives from the Laborers Union and St. Charles Catholic Parish, as well as a Cully Leadership Team, which incorporated participating contractors and representatives from partner institutions.

MACG metropolitan
alliance for
common good

Metropolitan Alliance for Common Good (MACG) is a broad-based organization of 20 religious congregations, labor union locals, and community-based organizations within the Portland area. It is an affiliate of the Industrial Areas Foundation (IAF). MACG leaders are currently driving campaigns related to healthcare, survivor housing, and sustainable jobs.



As an economically diverse neighborhood with a median household income of \$50,000--approximately 40% lower than the Portland average—Cully posed unique challenges for the program. Of the 4,677 housing units in the neighborhood, an estimated 1,800 were owner-occupied and met the requisite CEWP eligibility criteria. Focusing primarily on these 1,800 homeowners, we were able to recruit 221 homeowners to complete applications for the energy assessment process. Of those 221, 16 applications were submitted from households of

St. Charles parish members who lived beyond Cully's designated boundaries. As a result, approximately 1 in every 9 eligible homes in the neighborhood applied to CEWP, a density nearly four times greater than previous, non-geographic or community based efforts in the city.

Community Marketing and Outreach Strategy

Starting in July, Changing the Climate in Cully began marketing and outreach with five principle tactics: organizing a large “kickoff event” that would bring homeowners throughout the neighborhood together, building buzz for the program and serving as an initial information session; house, community, and organizational meetings; door-to-door canvassing and leafleting; phone calls; and “visibility” events, such as maintaining a presence at the local farmers’ market. The strategy was to “layer” contacts in the neighborhood, so that the program was communicating with homeowners on multiple occasions, and in different ways, all within a short timeframe. Like any successful communications or advertising campaign, the goal was to have one message, communicated through various mediums.

❖ Community Kickoff Event

The most successful individual component of the program was the kickoff event in July, which was attended by over 250 members of the Cully community. The event was critical to raising awareness of the program in the neighborhood, and resulted in 57 homeowners pledging to submit applications. The event served as a foundation for future activities, providing an initial group of “leads,” publicizing the program for homeowners, and energizing volunteers and partner organizations for additional outreach.

Door-to-Door Canvassing

Door-to-door canvassing was the primary method of communication with homeowners.



*Neighborhood crowd gathers for kick-off event.
Photo by Christian Columbres Photography*

Canvassing is a proven tactic to engage and organize members of a community for issue advocacy efforts and political campaigns. The face-to-face contact helps to personalize the bond between the program and the homeowner, which was critical, given that homeowners in the Cully neighborhood started with a very low base of knowledge regarding energy efficient home retrofits.

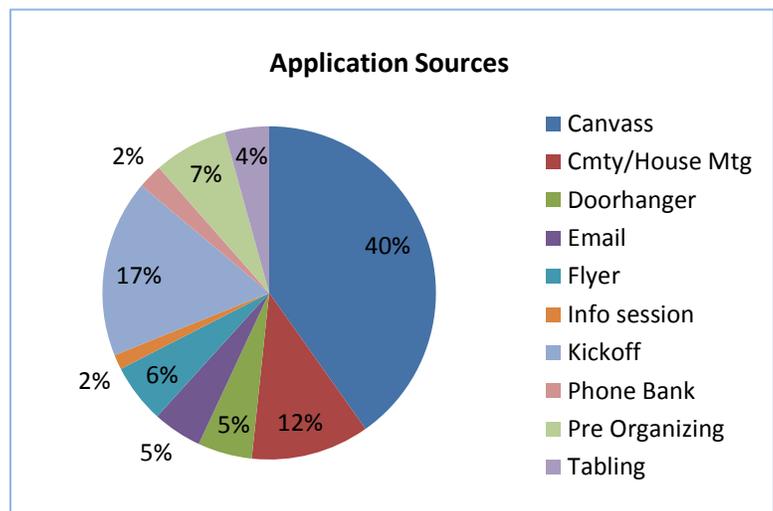
By some measures, door-to-door canvassing was our most efficient form of communication. Of the 2,500 doors knocked by volunteers and staff, we were able to speak with 838 homeowners—nearly one conversation for every three homes visited. Furthermore, close to 40% of the total applications submitted during our pilot program originated with homeowners who were first contacted at the door. On average, an application that originated with a door knock required three hours of staff and volunteer time—approximately the same as the lead-generation calls, and far less than other forms of outreach. However, an effective canvassing operation is necessarily resource-heavy, and requires either a committed base of volunteers, or significant staff time.

Type	Touches	Applications	Vol. Hours	Staff Hours	Hours/App.
Canvass	2503	84	108	147	3
Door-hangers & Fliers	6750	23	263	31	13
Kickoff	170	36	193	195	11

❖ Phone Calls

Phone calls were primarily used to follow up with homeowners who had already expressed an interest in the program, or who had taken initial steps towards filling out an application. Follow-up calls, conducted by both staff and volunteers, proved to be an extremely efficient method of communication, with a contact rate of 44% on the more than 600 attempts made. Our contact rate on the phones was more than double what we had initially expected, which was most likely due to the quality of our data, since most homeowners provided accurate phone numbers when first contacted on at the door or at an event.

On a smaller scale, we utilized phone calls to initiate contact with homeowners in the neighborhood who we had not spoken with at their door or a community event. These lead-generation (or “cold”) calls were primarily used to contact members of local partner institutions, such as the Sierra Club and the Cully Association of Neighbors. These lead generation calls had a contact rate of 21%, and were burdened by a large number of invalid or disconnected phone numbers.



❖ Community Visibility

Maintaining a visible presence within the neighborhood was essential to publicizing the program, creating community “buzz,” and establishing CEWP as a brand that homeowners could trust. Integrating the program into the community included staffing a booth at the Cully Collective Market, the local farmers’ market; setting up a regular presence outside of Albertson’s, the prominent neighborhood grocery store; and sending volunteers and staff to pancake breakfasts and other events at local schools.

Interested neighborhood residents also received a “Changing the Climate in Cully” sign, which was displayed on their front lawn. While less than 10% of the total applications submitted originated from meeting homeowners at these visibility events, they were an important component in establishing and maintaining a presence in the community.

❖ Community Meetings, House Parties & Organization Events

Applying some of the lessons learned in other programs across the country, we stressed community meetings and house parties as an outreach tool. The meetings are highly effective venues for educating homeowners about the benefits of home retrofits, and amongst the five outreach methods, they produced the highest rate of converting interested homeowners into applicants. The meetings help to build a sense of community belonging and engagement, and eased the worries of individual homeowners about the program.

In the house party setting, individual homeowners volunteered to invite their friends, neighbors or co-workers to their home. A Changing the Climate in Cully staff person would provide light refreshments and work with the hosting homeowner on a short program, which included a presentation from one of our partner contractors, as well as a testimonial from a homeowner who had completed a retrofit through the CEWP program.

Community meetings were similar, but hosted by a

CULLY HOMEOWNERS



When Kouya married Sheela, his home needed to undergo some changes. Sheela preferred a much warmer home, and despite the couple’s focus on efficiency, their energy bills quickly rose.

In July, the couple stumbled upon the kick-off event. Inspired by the community effort, and pleased to learn of the easy financing options, the couple became one of the neighborhood’s early program adopters.

“There is an individual impact to the comfort in our own home, but if you go outward, the community benefits, the environment benefits, and the contractors are providing jobs and benefits.”

participating organization focused on turning out their members. The campaign hosted nine such events with 40% of attendees applying for an efficiency upgrade. Although these events can be staff-intensive in terms of recruiting and working with the volunteer hosts, attendees were much more likely to apply for an efficiency upgrade.

Role and Value of Local Partners and Organizations

Local partner organizations played a critical role in the Changing the Climate in Cully program, and are a necessity for any successful community-based organizing effort. These groups provide immediate in-roads into the neighborhood, offering established relationships with individuals and constituencies, and help to build a sense of trust in the community.

Most groups can efficiently communicate with their membership through a variety of mediums (regular meetings, email, newsletters, etc.), which helps to shoulder a significant burden for outreach and marketing. These groups also allow programs to tailor messages to the members' known interests. For instance, outreach to Sierra Club members included a strong emphasis on the positive environmental impact of retrofits, while members of other groups received information on the value of creating sustainable "green jobs" in the community.

Moreover, the presence of organizational logos on materials and endorsement of the campaign increased homeowner confidence in the program and contractors. This was particularly valuable in decreasing the standard homeowner's costly urge to solicit multiple bids.

Partner organizations also provided an important source of volunteers, who canvassed, made phone calls, and dropped leaflets in preparation for the community kickoff event. While Changing the Climate in Cully received a significant boost from the donated time and effort, participating organizations also benefitted by providing a platform to initiate communication and foster deeper connections within their membership.

By the end of December, 36% of the applications submitted in Cully were from homeowners who were a member of one of the main partner institutions.

CULLY HOMEOWNERS



Meredith and Alicia knew when they purchased their home in Cully, originally built in 1944, that poor insulation and a decrepit furnace were hurting the home's efficiency.

"We always thought something was wrong with the heating ducts leading to the bedroom, like they were blocked or something and none of the warm air could get there, but turns out it all we needed was insulation!"

Alicia is an electrician apprentice and initially heard about Clean Energy Works Portland through her union's newsletter. Following the retrofit, the homeowners are much more comfortable in their home, and Alicia was pleased to put her fellow electricians and union members to work.

Partner Contractors

Changing the Climate in Cully partnered with six contractors, who completed all of the retrofit work on homes in the neighborhood. All contractors were locally based, and half were women or minority-owned business. In order to maximize community benefits, new workforce members were recruited locally from disadvantaged populations, and all contractors operated under a Project Labor Agreement with the Laborers Union Local 296.

Because all contractors were operating on a level playing field, there was a greater sense of collaboration and cooperation. With the help of MACG staff, contractors consolidated sub-contracting services and major supply purchases in order to receive bulk discounts. A trailer full of insulation was purchased at deep discount and parked in a local Albertson's lot in the middle of the Cully neighborhood.

With this collaborative spirit, experienced contractors in the pool mentored and offered advice to less established businesses. As well, all participating contractors "crew shared," allowing increased training opportunities and more work hours for employees in an industry where many struggle to maintain full-time hours.

Qualified & Local Workforce

Clean Energy Works Portland, through its innovative Community Workforce Agreement, is strongly committed to creating high-quality jobs that employ local residents. Changing the Climate in Cully was proud to partner with six local contractors, who in turn hired over 10 new employees from the community.

Most of the new hires received training through the Laborers' Union Residential Weatherization Training Program, one of the most comprehensive training regimens in the industry. The Union maintains a designated training program under CEWP, and has trained a majority of the new workers hired during the program over the past year and half. The Union's valuable partnership with community pre-apprenticeship programs results in training and jobs going to local residents, many from disadvantaged or underrepresented backgrounds—over half of the workers trained in LIUNA's weatherization courses have been women or minority workers.

CULLY CONTRACTOR & WORKFORCE



Verde Energy is a social enterprise dedicated to providing weatherization services to the community, while building a skilled workforce out of the people who live there.

One of Verde's employees is a great example: One year ago he was homeless and sleeping on friends' couches. Now he's a graduate of LIUNA's Residential Weatherization Training Program, a skilled weatherization technician, lives in his own apartment and earns a steady wage.

Outreach Expenses & Financial Support

For the Phase V pilot program, CEWP and the City of Portland provided a \$20,000 grant for outreach and marketing. These funds were primarily used to cover the costs of materials such as fliers, door hangers, and lawn signs; the wages of part-time Outreach Coordinators, who helped organize the neighborhood; and expenses related to the July kickoff event and other community meetings and information sessions.

The largest single expense were wages of the four Outreach Coordinators, which totaled nearly \$8,000. However, the work done by part-time staff was leveraged by more than double the number of hours contributed by volunteers and in-kind staff time from partner organizations. MACG staff dedicated themselves virtually full time to the Cully effort for over four months. The cost of that staff time, over \$30,000, was covered through per-retrofit contributions by participating contractors.

Significant in-kind contributions were made by partnering organizations:

- ❖ The Laborers (LIUNA) dedicated a part-time staff person to the effort, who was primarily responsible for helping to prepare and implement the canvass program, which included mapping the neighborhood, compiling packets and walks lists, and producing other materials as needed. LIUNA also provided resources from their national office as requested by MACG and the partner organizations, which included training MACG outreach staff to run successful canvass and phone bank operations.
- ❖ Sierra Club used external resources to send direct mail to their Cully contacts and dedicated staff and volunteers to run a full day of neighborhood canvassing.
- ❖ St. Charles Catholic Parish regularly contributed meeting and event space.
- ❖ Contractors were present at every event as a resource to homeowners, loaned trailers and time to set-up events, and even helped canvass.
- ❖ Verde Inc. contributed two of their employees to leaflet the entire Cully neighborhood and helped the campaign reach out to Spanish-speaking residents.
- ❖ The Cully Association of Neighbors was a critical voice in developing a Cully appropriate campaign and marketing materials. They also regularly contacted their active membership list recruiting valuable volunteers, leaders, and retrofit applications.

Most importantly, individual leaders within partner organizations contributed countless hours in planning meetings, volunteering in outreach efforts, and working to inspire their fellow leaders and neighbors.

Results and Conclusion

While the final results of the pilot are not yet known (at the end of 2010, 221 applications had been submitted, 109 energy assessments completed, and 19 loans signed), the partners of Changing the Climate in Cully are encouraged with the returns to date of our outreach efforts. We recognized at the program's commencement that there were significant barriers to success, many of which are similarly confronted by programs across the country. Likewise, the lessons and information we have learned are not necessarily unique to our program alone.

We believe the results and lessons learned in our pilot can create and inform a scalable model for organizations and programs seeking to foster demand for energy efficient home retrofits, particularly beyond the group of "early adopters" (i.e., the small number of homeowners who pursue retrofits without a significant recruitment effort). As retrofit programs strive to meet aggressive targets, they will need to reach deeper into communities. Neighborhood partners can provide pre-built networks and trusted modes of communication, though many will require partners with expertise in the retrofit industry.

For questions or additional details, please contact Laura Belson of Metropolitan Alliance for Common Good at 503-235-6474, laura@macg.org; or Kirsten Isaacson of LIUNA at 503-877-2369, kisaacson@liuna.org