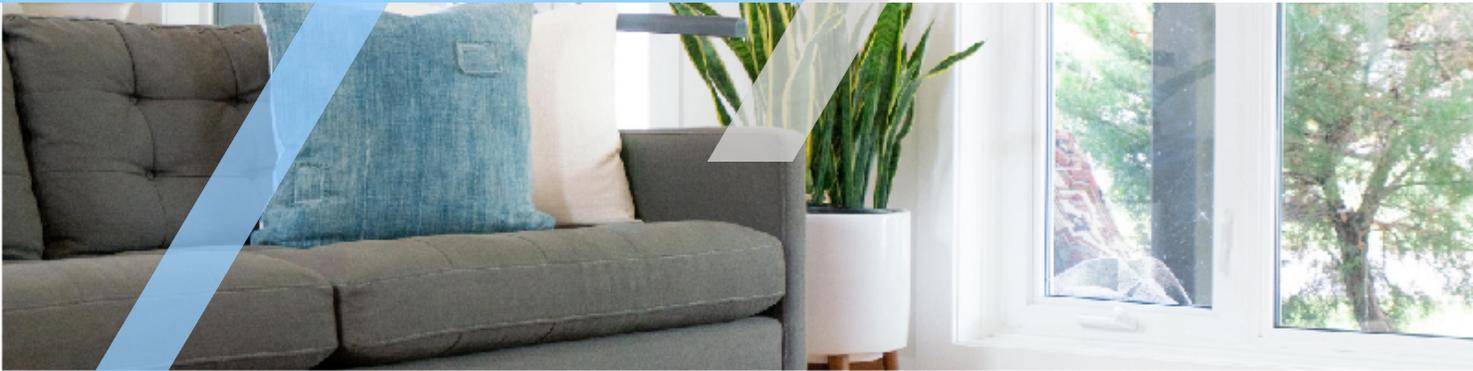


**University of Oregon – Office of Sustainability**

# **Home Energy SCORE Program – Year Three**



**Sarah Stoeckl, Program manager**  
Email [sstoeckl@uoregon.edu](mailto:sstoeckl@uoregon.edu)



## OVERVIEW

The Home Energy SCORE Program is the result of a partnership between Eugene Water and Electric Board (EWEB) and the University of Oregon's Office of Sustainability (UO Sustainability), with support from the City of Eugene.

Now concluding its third year, the program provides low-income rental residents in the EWEB service territory free energy efficiency assessments for their homes. EWEB selected the assessment tool (based on a national and state-sanctioned model); promoted the program by sending promotional materials to 7000 low-income customers; provided \$3,000 to cover student training and certification costs; reviewed the work of student assessors; and provided student workers with vehicles and the tools needed to get to sites, collect, and report data. The City of Eugene provided \$10,000 to pay exclusively for student labor via a separate contract with the university. UO Sustainability provided program management staffing, including hiring, training, and supervising six student workers to conduct the assessments; managed the scheduling of home visits; sent assessment reports to customers and property owners; and worked to achieve program goals.

## **STAFF RECRUITMENT, TRAINING, AND HIRING**

University of Oregon recruited six students during fall quarter of 2018 to work as home assessors. This included three students returning from previous years plus three new. All student assessors are undergraduate or master's students in the UO School of Architecture and have completed the courses ARCH 491/591–Energy Control Systems or ARCH 470-570–Building Construction.

Student staff completed the following un-paid, mandatory trainings:

1. USDOE building science prerequisite training and exam (2-6 hours);
2. USDOE online simulation training and exam (8-12 hours);

After the required prerequisites in November-January 2018, UO Sustainability hired the students officially. All student workers had to then obtain a basic energy assessor certification from the State of Oregon Constructor Contractors Board. EWEB paid for all exam and certification fees out of their \$3000 contribution to the program. The new student staff also shadowed EWEB staff on at least one home visit before being paired with another student to conduct home visits. The project was able to save money by rehiring student workers from year one who only needed to renew their certification and did not need to re-do the training.

EWEB staff provided access to and support with using assessment tools and reporting systems. UO Sustainability staff provided logistical program support and coordination.

## YEAR THREE IMPROVEMENTS

This year we made a few key changes to improve the client experience and efficiency for staff. First, a new [online application form](#) digitized the application process, streamlining and speeding up the process for clients. Second, [scheduling software](#) enabled clients to select directly from available appointments and sent automatic reminders via text message and email. Both the online form and scheduling software improved the client experience, and also freed up staff time and increased the efficiency and accuracy of data gathering.

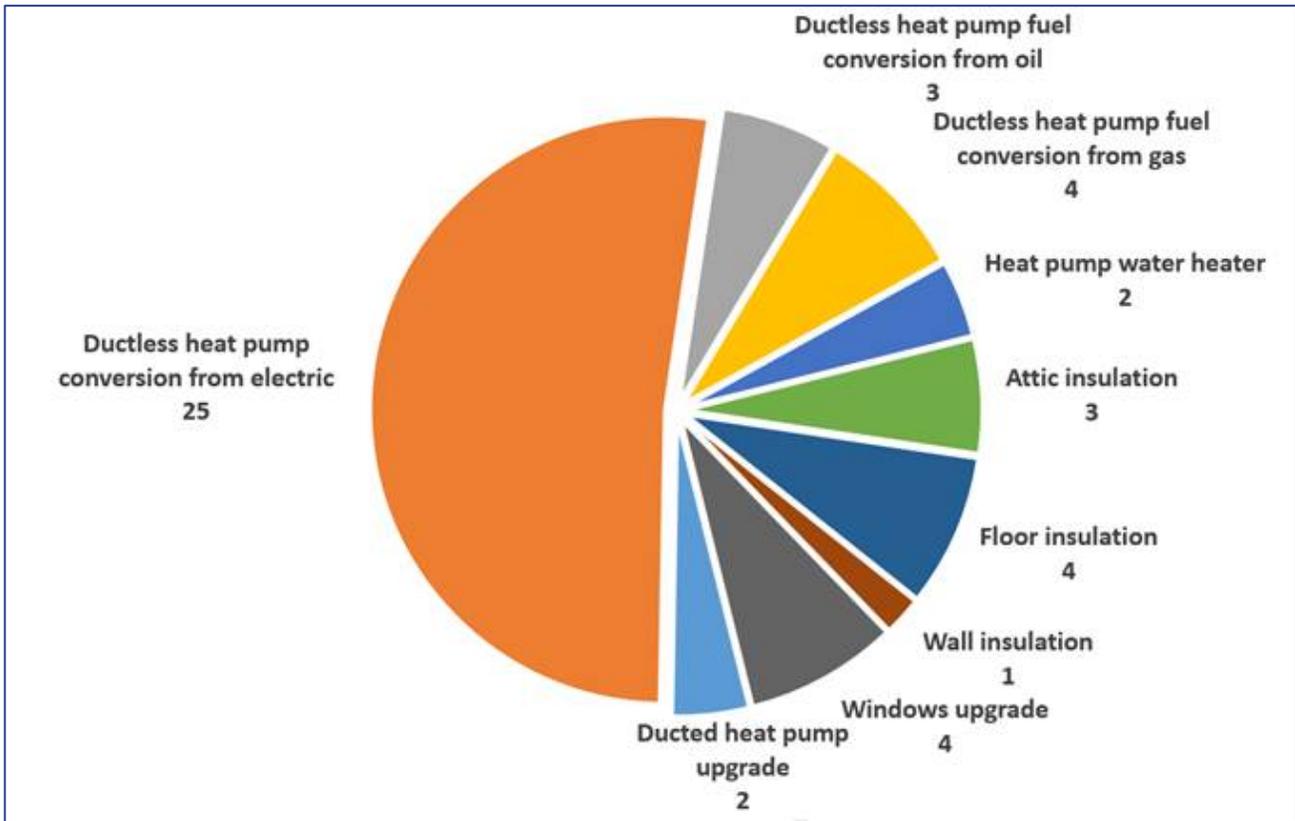
To expand the applicant pool this year, we offered free assessments to low income home-owners living in their properties, in addition to low income renters and rental properties generally. In response to client feedback from last year, we also added in suggestions to improve energy efficiency that residents can implement themselves. This change empowers residents to have some control over the energy efficiency of their homes and make the experience valuable to them whether or not their landlords make efficiency upgrades.

Last, a smaller student staff (six versus 8-9) allowed the program to meet demand while also keeping the workflow for student employees consistent. The scheduling software also increased the consistency of the assessment timings and amounts for student staff.

## PROGRAM RESULTS

Due to these improvements in both outreach and scheduling for prospective clients, we assessed a similar amount of properties to last year even though we assumed a drop was possible. (See takeaways section below for further information and proposed improvements.) Over 300 customers applied for free home energy scores. Of those, roughly 150 did not schedule or canceled their assessment and six were scored informally as a courtesy to the customer when the property did not meet assessment requirements. In total, student workers assessed roughly 150 properties, on Thursdays, Saturdays, and Sundays from November 2018 – June 2019. Home energy report cards were emailed to tenants and mailed to property owners.

Since the program began, there have been almost 470 homes officially scored (and others unofficially or unable to be completed) and 39 homes (8.3%) completed upgrades after the assessment, representing \$188,000 invested in these homes and taking advantage of \$30,000 in rebates from EWEB. These projects saved 131,172 kWh per year. Further, seven homes have converted completely away from fossil fuels, resulting in annual carbon savings of 67 MTCO<sub>2e</sub>. Many property owners take up to a year after receiving the assessment before taking action. We will update the investment estimate in one year and share with program funders and partners.



Upgrades made since the program began in 2017.

## TAKEAWAYS

Year three brought consistency and streamlining to the program. The new systems and processes had a learning curve but overall they increased efficiency for staff and improved the client experience substantively.

### **Student Employees - Efficiencies and Expenses**

Bringing back half of the student workforce decreased costs in training and provided a mentorship model for new workers. Having a smaller team also made the workflow more consistent for student staff. All three senior student staff graduated this year, indicating that costs and time related to recruitment and training will both increase next year.

Changes to the student pay rate resulted in a small increase in student payroll expenses compared to last year. Recently enacted increases to the state minimum wage and UO guidelines for student employee pay rates means that student payroll expenses will almost certainly increase next year.

### **Client Pool**

A limited client pool means diminishing returns. As in years one and two, EWEB reached out multiple times via email to its pool of approximately 7000 low income rental customers. We also extended the program to property owners receiving low income bill assistance. EWEB also increased outreach on social media and UO Sustainability connected with local neighborhood associations to increase awareness of the program. Because of returning student staff, the program started slightly earlier this year as well. These efforts resulted in essentially matching last year's assessment numbers, but still represent a decrease over year one. Given that the methodologies employed to inform customers about the program are unlikely to change significantly, and that this pool of potential applicants is unlikely to change significantly year over

year, we expect numbers would continue to decrease without changes to potential applicants.

There are several ways that we could change our approach to increase engagement in the program in year four and beyond. Ideas under consideration include:

- From EWEB:
  - Include the SCORE program into the Weatherization Plus program. (Reach of approximately 60-80 homes per year.)
  - Offer assessments to those behind on bills.
  - Offer assessments to those seeking rebates and discounts to improve their rental properties. (Reach of approximately 150-200 per year.)
  - Promote before and after assessments to increase the value proposition for customers and increase data and impact for the program.
- From the City of Eugene:
  - Revisit the idea to waive the \$10 annual fee for the Rental Housing Code communications program in exchange for having rental properties scored. (One time for each property.)
  - Align and leverage the program's capabilities with any legislative changes the City enacts around SCORE Home Energy Assessments.
- From All:
  - Find a way to assess multi-family properties or others not eligible for assessments under the current system.

In an effort to make the program a success in year four and beyond, one or more of these ideas should be adopted and will be agreed upon by all stakeholders and included in updated contracts. UO Sustainability believes that targeting the pool of applicants and/or including the program as a “carrot” attached to other initiatives can enhance the reach and value of the project in the future. We also welcome other suggestions and ideas from the City of Eugene and EWEB.

## **BUDGET – City of Eugene contribution**

UO student labor totaled \$9183.81--\$1895.09 left over from last year's grant and \$7288.72 from this year's. All City of Eugene funds have been spent as directed to cover student labor.

Appendices – Example 2018-19 Home Energy SCORE property report below.