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Metropolitan Area Planning Council RFI:
Home Performance Contractors for Municipal Outreach Partnerships
HomeWorks Energy, Inc. Responses
December 2019

Prepared By:

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Question Responses

- 1) HomeWorks Energy is headquartered in Medford, MA and we have branch locations for field staff in Springfield, Wareham, Stoughton, Hudson and Woburn. For Home Energy Assessments our territory is all of MA except for towns that are serviced by UNITIL, Berkshire Gas or Liberty Gas utilities or towns that solely have municipal gas and electric services
- 2) As of December 2019, HomeWorks Energy has 430 staff members
- 3)
 - a. HomeWorks offers Home Energy Assessments, Weatherization (Insulation & Air Sealing) and HVAC sales & installations (our HVAC territory is not currently as large as our HEA territory). We also offer HVAC service visits for customers whose systems fail CST at the HEA, and electrical inspections for customers found to have signs of K&T in the home.
 - b. For insulation, HomeWorks performs 90% of jobs with our own crews. For HVAC installations, we have 2 in-house crews and subcontract the rest of the work to a single company
- 4) In 2017 HomeWorks performed 21k HEAs, 2018 was just under 29k HEAs and 2019 will end with just over 29k HEAs
- 5) HomeWorks' Marketing department has 8 people working in management/office positions and 10 Field Marketing Ambassadors who are a mix of full and part times employees. We will be continuing to add to our Field Marketing team over the coming months, peaking in the Summer.
- 6)
 - a. We currently have 10 Field Marketing ambassadors who staff events and conduct tabling at retail locations such as local malls. We also work with partner companies who schedule HEAs for our team who canvass and also provide staff for events that we cannot cover with internal resources.
 - b. On staff are a Digital Marketing Manager and Partnerships Manager who can engage with the municipality's social media and websites as needed. For example, with existing partnerships we set up landing pages on our website that are specific to the partnership where the municipalities can direct customers to sign up for a HEA through HomeWorks.

- 7) Our call center team has a target of answering 95% of all inbound calls and responding to voicemails within 1 business day (usually sooner). For new leads, our target is to make the first contact attempt within 24 hours and are usually reaching out within hours on business days.

- 8) While we are happy to provide guarantees for our work, HomeWorks has been discouraged from using words like “guarantee” in customer-facing materials by the Mass Save Program and as such any guarantees beyond what is already in our installation contracts would need to be handled carefully. Additional guarantees would be considered and approval dependent upon the nature of the guarantee – as in, are we guaranteeing the quality of our work, or would the guarantee include things like energy reductions after the work has been performed?

- 9) HomeWorks Energy takes customer complaints and issues very seriously. When a customer has an issue at any point during the process, a Case is created on their customer record to both log the existence of a problem and provide tracking until a resolution is achieved. In escalated customer situations, our management team steps in to ensure we handle the situation to the customer’s satisfaction. In cases where HomeWorks is at fault for causing damage, or an issue arises with our work post-installation, we are committed to providing repairs at no cost to the customer, as quickly as possible. Our dedicated team of Post-Weatherization Case Managers works with homeowners to coordinate any payments or subcontractors required related to repairs. To ensure we are consistently providing an excellent customer experience, HomeWorks sends out surveys to customers after each HEA, Weatherization and HVAC Install where they can provide us with feedback and rate our performance. Our management team reviews these surveys each week (at a minimum) and follows up with all customers who have indicated they had a less-than-positive experience even if the customer did not leave us any comments.

- 10)
 - a. HomeWorks has partnered with several local municipalities and community organizations, both in the past and currently. Current partners include the Town of Lincoln, Green Needham Coalition, Town of Lexington, Keep Attleboro Beautiful and Green Newton. Partnerships vary in terms of their activities, but generally include HomeWorks Staff tabling at locations within the community, a custom landing page & website presence, social media posts and occasionally will coordinate with the Town on a co-sponsored Direct Mail campaign.
 - b. HomeWorks is happy to work with municipalities and other community organizations on designing an outreach campaign which best suits their needs and goals for completed HEAs resulting from the partnership

- 11)
- a. HomeWorks would be happy to enter additional exclusive partnerships with municipalities, as we have done in the past with some partners. We offer donations for completed HEAs that are signed up through the partnership and have also offered donations for any follow-on work completed (such as insulation) with those same customers. Our standard donation level is \$25/completed HEA.
 - b. For an exclusive partnership, we would expect assistance in coordinating tabling locations within the municipality and participation in setting goals for the campaign. Our most successful partnerships have included a direct mail campaign co-sponsored by the Town, which tend to have high response rates and are well worth the investment on our part.
- 12) While we are certainly open to providing customers with additional information related to sustainability initiatives, to provide tailored information to customers based on their municipality presents some hurdles at scale. Additionally, while our Energy Specialists are all passionate about residential energy efficiency in all aspects, at the Energy Assessment their focus is on building the value of energy-efficient upgrades with the customer, to encourage them to move forward with any recommended measures. Therefore, it would be best if the information could be distributed to customers via flyers or email rather than a point of conversation with the customer during the HEA.
- 13) HomeWorks has partnered and continues to partner with municipal governments and community organizations. One of those partnerships is a group called Green Needham. We've leveraged our partnership with them in a couple of different ways, namely they have gained permission for HomeWorks to send field marketing representatives into spaces like the transfer station and in front of highly trafficked grocery stores in town. In the late summer/ fall, the town of Needham won a state level grant called SolarizePlus, which provides residents with additional incentives to install solar. The Solarize program also promotes the sale of heat pumps, and a HVAC company called NETR, Inc applied and is the official partner of the program. NETR expressed that they did not want our partnership to continue with the town while SolarizePlus is in place because we are their direct competition. HomeWorks sat down with Green Needham and discussed different ways we could continue the partnership while SolarizePlus is in effect. We offered a few different solutions, which included asking our field marketing team to solely set home energy assessments, not heating & cooling appointments, while tabling in Needham. We also offered to have our energy assessors promote the SolarizePlus program during all energy assessments in Needham by leaving a pamphlet behind with the homeowner. HomeWorks is open and willing to tweak practices in order to make partnerships work for everyone involved. In the end, HomeWorks stopped attending events in Needham while the

SolarizePlus program was in effect and decided to pick up where we left off once the program is completed in spring 2020. In the future, I think HomeWorks would work even harder to engage in dialogue with all parties involved in order to come up with a solution to issues when they arise.

14)

- a. HomeWorks regularly serves customers in multi-family buildings with up to 4 units, which frequently include renters.
- b. For interested customers who live in 5+ unit buildings, we direct them to the Multi Family Program via Mass Save and provide them with the correct phone number to reach the program. Similarly, for customers who have a low-income rate code we refer them to their local CAP agency and provide them with that phone number unless they are not interested.
- c. HomeWorks energy assessors help moderate income customers take advantage of additional incentives through the MassSave program as needed. Our customer intake team helps the customer navigate the process to qualify for those incentives.
- d. HomeWorks employs a diverse group of people that hail from all walks of life, including Spanish and Portuguese speakers, who can help assist customers. We employ Spanish speaking customer intake associates, home energy assessors, insulation crew members, and staff in the heating & cooling department who can assist customers as well.
- e. We also partner with a non-profit organization called All In Energy, whose mission is reaching underserved populations. All In Energy recruits diverse, multilingual staff for its outreach roles through partners and educational institutions, who set leads on behalf of HomeWorks Energy.

15) Like the response for question 12, providing additional services not normally part of a Mass Save Home Energy Assessment only for customers in certain municipalities does present significant challenges. Our Home Energy Specialists are performing 2-3 HEAs per day, and their calendars are optimized around the length of a standard Mass Save audit. As such, providing additional services that would extend the length of the HEA (such as a blower door test) would be undesirable for HomeWorks Energy. On top of issues with HEA length, if any additional equipment is required for services beyond the Mass Save HEA this would be a financial burden, as we would need to equip all Energy Specialists who perform HEAs in the region of the municipality.

16)

- a. We can provide reporting on all customers received via the partnership, with details on where they are in the HEA scheduling process through any follow-on work completed such as Insulation or HVAC. It is also possible for us to calculate the potential energy and



money savings from completed HEAs based on the ISMs installed, and energy savings/money savings from completed Weatherization and HVAC installations, which we would then provide to our partner if desired. HomeWorks regularly calculates the impact of our work in terms of energy & money savings for our customers and promote these numbers within our organization, as environmental consciousness and energy efficiency is core to our company mission.

- b. HomeWorks uses Salesforce as our CRM, producing such reports is an easy process which can also be automated, if desired. The standard reporting cadence is Quarterly, although we are happy to provide reports more frequently than that (e.g. Monthly, Weekly) as desired by the partner.

17) We believe it is important to consider average cycle times, such as time from scheduling to completed HEA and time from completed HEA to completed Wx work. Also, while it was only provided as an example, I did want to reiterate that conducting blower-door tests as part of the Energy Assessment would add significant time and expense to HEAs – the blower door kits costing a few thousand dollars each and the test taking up to an hour from setup to breakdown. While HomeWorks does perform blower door tests before and after and Insulation/Air Sealing is installed, we only provide kits for our insulation trucks as a result.

Sample Marketing Materials:

Web Site Landing Pages

Green Newton: <https://contact.homeworks-energy.com/green-newton>

Lincoln Energy Challenge: <https://contact.homeworks-energy.com/lincoln-energy-challenge>

Direct Mailer – Town of Lexington Partnership



Dear Lexington Resident,

The **2019 Lexington Energy Challenge** has begun with the goal of helping 1,000 residents take advantage of the Mass Save® program to improve their homes and support our efforts to reduce the town's overall energy consumption. The Town's Sustainable Lexington Committee is working with HomeWorks Energy, a leading Mass Save partner, to make residents aware of the no-cost program and give residents access to discounts and rebates for home improvements.

We know we can do it! In 2017, Lexington residents completed 947 Home Energy Assessments. Of those, 256 residents installed new insulation rebated at a 75%, and 157 residents installed new heating systems – earning thousands in Mass Save sponsored rebates. These residents improved the comfort of their homes and reduced their heating costs, while also reducing carbon emissions.

The Mass Save program is funded by a small energy efficiency charge on your monthly utility bill and is managed by Eversource and National Grid, and other sponsoring energy efficiency providers, to help residents and businesses operate as efficiently as possible*. In fact, Massachusetts is the #1 energy efficient state in the U.S. for the 7th consecutive year. If you haven't already signed up for a no-cost Home Energy Assessment in the past two years, you're eligible for one this year!

There are two ways to sign up:

- **Sign-up on line:**
 - Visit www.homeworksenergy.com/partners/Lexington to see all the benefits of a Home Energy Assessment and sign up for your home visit.
- **Or call our partner, HomeWorks Energy, at (781) 305-3319.** Be sure to mention the Lexington Energy Challenge.

Homeowners, as well as renters in buildings with 1-4 units, are encouraged to schedule a no-cost energy assessment and help us reach our goals. Together, we can make a difference!

Sincerely,

Todd Rhodes
Sustainable Lexington Committee
www.lexingtonma.gov/sustainable-lexington-committee



*Some restrictions apply and offers are subject to change or cancellation. Visit MassSave.com/HEA for full details.

Social Media Ads & Field Marketing

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We're proud to sponsor the Boston Ski and Snowboard Expo this weekend. Stop by the HomeWorks Energy booth and speak with our team members about getting a Mass Save no-cost home energy assessment.

