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## Events

### Energy Efficiency: How to Design a Highly Successful Portfolio of Programs

10/11/2010 - 10/12/2010

1pm-5pm Monday, 8am-4pm Tuesday



  
 presents a course on:  
**Energy** Efficiency  
 How to Design a  
 Highly Successful  
 Portfolio of Programs  
**October 11-12, 2010 • Chicago**

Learn Best Practices to Design, Implement and Market Your Energy Efficiency Programs

October 11-12, 2010  
Hilton Garden Inn Downtown/Magnificent Mile  
Chicago, IL

Course Pricing: \$1195.00

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Learn Best Practices in this Intense One-and-a-half Day Course on **How to** Design or Re-Design Highly Successful Energy Efficiency Programs for the Mass-Market

#### Overview

This information-packed day-and-a-half course provides essential data critical to the initial or re-design of a highly successful mass-market energy-efficiency portfolio of programs. It addresses the critical issues and questions that must be examined and answered to ensure that the

desired reductions in energy and demand are achieved. Elements of program planning, marketing and operations are discussed to guarantee that maximum participation and savings is achieved over the life of the program, that customer satisfaction exceeds expectations and that cost effectiveness requirements are met.

The course specifically teaches participants how to:

- Evaluate options for different programs
- Define and measure energy efficiency program success
- Work with National Programs: ENERGY STAR New Home, Home Performance with ENERGY STAR, Home Star
- Drive an on-site audit and customer-fit solutions to maximize program yield and keep costs in check
- Establish program goals that are in keeping with the real potential
- Determine program goals, deemed savings and proper incentives; what you should know before moving forward
- Identify best practices for new home programs, existing home programs
- Optimize effective methods for Low Income Weatherization programs
- Learn what you need to know about your customers
- Energize the Marketing Plan: How do you keep it fresh and avoid the pitfalls?
- Understand the critical issues of utility – vendor Information Technology
- Consider what the utility's image has to do with program design and marketing
- Maximize the opportunity of putting a trained technician in the home (it's expensive)!
- Stratify Utility, GIS, and demographic data to render a probability index for target customers
- Identify best practices for QA/QC programs (field checks, building file checks, checking receipts, etc.)
- Build the business case for efficiency programs - They may be the cheapest form of Incremental supply

The course also features instruction on:

- Introduction to building science & explore the most cost effective energy efficiency measures
- Enrollment and operations interdependency: Forecasts, cost containment, backlogs and timing  
Technology to effectively deliver *The Integrated Program Delivery*

### *Model*

- A convergence of RFP intents – design and implementation are foremost

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### **Who Should Attend This Course?**

This course was developed for utility executives, management and professionals who work with or are interested in the various designs, requirements, applications, operation and evaluation of energy efficiency programs.

- Vice Presidents of Marketing and Operations
- Department Managers with responsibilities for demand-side management and resources
- Department Managers with responsibilities for energy efficiency programming and operations
- Engineers and Business Analysts responsible for program design and implementation
- Demand-side Economic Analysts responsible for Measurement and Validation
- Demand-side planning professionals
- Strategic Marketing and Business Development staff
- Professionals responsible for rate design and application, product and service pricing

### **Course Agenda**

Monday, October 11, 2010, 8:30 am-5:00 pm

- Introduction of Participants
- Expectations for session
- Questions posed by attendees
- Building Your Portfolio
- Evaluating the options for different programs
- Targeting your audience for each program
- Defining and measuring success
- Customers will participate in progressive, positive programs, yield higher customer satisfaction
- Working with the National Programs:
- ENERGY STAR New Home: Program changes and how they affect sponsored programs
- Home Performance with ENERGY STAR: Contractor vs. Consultant models
- Home Star: Potential new offerings via this national program and

how it fits with others

- Best Practices in Energy Efficiency Programs
- Intro to building science & explore the most cost effective energy efficiency measures
- Best practices for new home programs
- Best practices for existing home programs
- Lead safety (new EPA regs)
- Very effective methods for Low Income Weatherization programs
- Leveraging ARRA funding initiatives by partnering with your Social Service Agencies
- “Total Energy Footprint”: When it’s appropriate / When it’s not
- Best practices for QA/QC programs (field checks, building file checks, checking receipts, etc.)
- Combustion safety and why you should use BPI accredited contractors.
- Understanding and Segmenting the Utility Mass Market
- What’s so hard about marketing anyway?
- Customers: What you probably don’t know, but need to!
- What’s utility image got to do with your marketing campaigns?
- Designing and targeting marketing campaigns for all program phases – start-up to mature program
- The marketing plan: How do you keep it fresh?
- Fully utilize the Social Media
- What resources should you have ready?
- Customer motivation: It's not JUST about the money
- Successful and Effective Program Implementation
- What to consider in deciding to in-source or outsource program operations
- Understanding the critical issues of utility – vendor Information Technology
- Enrollment and operations interdependency: Forecasts, cost containment, backlogs, and timing
- Key issues in operation of the customer call center
- Key issues to accomplish efficient routing and scheduling of installation technicians
- Expediting the handling of customer complaints
- Attention to detail makes the difference to ensure customer acceptance and satisfaction

Tuesday, October 12, 2010, 8:3 0am-12:00 Noon

- Rethinking Program Marketing and Portfolio Delivery

- Programs-of-the-Month can miss-the-mark and minimize real opportunity
- Putting a trained technician in the home is expensive ... so don't squander the opportunity
- Stratifying Utility, GIS, and demographic data to render a probability index for target customers
- Technology exists to effectively deliver *The Integrated Program Delivery Model*
- Driving an on-site audit and customer-fit solutions can maximize program yield and keep costs in check
- Basic Steps to Ensure that You Know What You are Preparing to Manage
- A convergence of RFP intents – design and implementation are foremost
- Response deadlines and timing demands – potential of trading time for quality
- Pros and Cons with using third-party RFP administrators
- Should the IRP/Program developers bid on the implementation?
- Establish program goals that are in keeping with the real potential?
- Program goals, deemed savings and proper incentives; what you should know before moving forward

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#### **About Your Instructors**

*Robert S. Mason, Jr. P.E., Vice President, Energy Efficiency, GoodCents*

*Bob Mason specializes in helping utilities develop and implement utility-sponsored energy efficiency and demand response programs for the residential, commercial, and industrial customer classes. He is responsible for profitable business models and operations of authorized HVA/C dealer network programs, utility rebate programs and expanded energy auditing. His attention is also on the potential for GoodCents to expand quality home and systems inspections, energy-rating certifications, and ENERGY STAR® home activities. During his time with Florida Power Corporation (now Progress Energy), Bob was instrumental in the development of the nation's first full-service utility power-quality program. Bob is a graduate of the University of South Florida with Bachelor and Master of Science degrees in Mechanical Engineering. He is a registered Professional Engineer in Florida, and a member of ASME, ASHRAE, AEE.*

*Abe Kruger, Kruger Sustainability Group*

*Abe Kruger is a certified Home Energy Rating System (HERS) Trainer*

*and Rater. He is an active member of the Residential Energy Services Network (RESNET) National Technical Committee. He has trained approximately 150 HERS Raters from around the country, Canada, and Puerto Rico. He provides green building training and presentations at regional and national conferences, including RESNET (Residential Energy Services Network), ACI (formally Affordable Comfort), Green Prints, and Green Build. He is accredited to perform EarthCraft House, LEED for Homes, NAHB Green Building, and ENERGY STAR® certifications. Mr. Kruger has conducted trainings on energy efficiency for existing and new homes for the Association of Missouri Electric Cooperatives and Georgia Power. He has worked with Santee Cooper, Progress Energy, Piedmont Natural Gas and Duke Energy. He is also involved with Georgia Power and Progress Energy on their respective ENERGY STAR® initiatives.*

#### **Conference Location**

A block of rooms has been reserved at the Hilton Garden Inn Downtown/Magnificent Mile, 10 East Grand Avenue, Chicago, IL 60611, for the nights of October 10-11, 2010. The discounted group room rate is \$189 single or double occupancy. Please call the hotel directly at (312) 595-0000 for reservations and mention the Conferences Connect/Energy Efficiency Course to get the group rate. Make your reservations prior to September 24, 2010. A limited number of rooms are available at the group rate, so please make your room reservations early.

#### **Location:**

Hilton Garden Inn Downtown/Magnificent Mile  
10 E. Grand Avenue  
Chicago, IL 60611

#### **For more information, please contact:**

Ashley Baptiste

610-325-4830

[ashley@conferencesconnect.com](mailto:ashley@conferencesconnect.com)

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