

# emPowerSBC 2013-2014

## Program Logic Model & Performance Measures

**Mission:** emPowerSBC is a Santa Barbara County program established to help the community transform its buildings, environment and economy through resource efficient improvements to existing homes and businesses. By leveraging public and private resources, emPowerSBC develops innovative, voluntary solutions to support a sustainable building performance market.

What do we do?			How well do we do it?	What community impact does it produce?	
Objectives	Inputs (Resources)	Activities (Key Tasks)	Outputs (Productivity)	Outcomes (End result)	Performance Measures
<p><b><u>I. Make Energy Upgrades Affordable</u></b></p> <p>A. Improve access to attractive financing products and processes</p> <p>B. Streamline access to rebates</p> <p>C. Lower project costs</p>	<p>DOE BBP ARRA (exp 8/2013)</p> <p>CPUC 2012 via SCG (pending)</p> <p>CPUC 2013-2014 (pending)</p> <p>CEC ARRA (pending)</p>	<p>A) Develop, operate and promote the following low cost financing products with credit union partners:</p> <ul style="list-style-type: none"> <li>-Single Family Unsecured Home Upgrade Loan (Launched 11/2012)</li> <li>-Single Family Secured Home Upgrade Loan (pending)</li> <li>-Multi-family Home Upgrade Loan (pending)</li> <li>-Multi-family secured Home Upgrade Loan (pending)</li> <li>-Small Business Upgrade Loan (pending)</li> </ul> <p>* Products may operate throughout Tri-County, pending fund availability</p> <p>B) - Financing qualification and QA streamlined with EUC or other utility rebate projects</p> <p>C) - Promote discounts offered by participating contractors</p> <ul style="list-style-type: none"> <li>- Connect contractors with bulk retail deals</li> <li>- Increase contractor participation to facilitate competition and drive down costs</li> </ul>	<p>A) - # of energy upgrades financed</p> <ul style="list-style-type: none"> <li>- \$ private capital applied to projects</li> <li>- # products developed or sectors addressed</li> </ul> <p>B) - # or % of financed energy upgrades completed using Energy Upgrade or other rebate</p> <p>C) - \$ Average project cost with special offer</p> <ul style="list-style-type: none"> <li>- \$ Average project cost without special offer</li> <li>- \$ saved</li> </ul>	<p>1. Increase customer knowledge and awareness of financing option</p> <p>2. Increase number of property owners that can afford to undergo energy upgrades to:</p> <ul style="list-style-type: none"> <li>- Save energy and avoid associated environmental impacts</li> <li>- Create local jobs</li> </ul> <p>3. Keep investment local to induce regional economic stimulus</p>	<p>1. # of loan applications</p> <p>2. # of energy upgrades completed, % energy saved, # GHG emissions avoided, # jobs created (direct/indirect)</p> <p>3. \$ credit union partner capital loaned</p>
<p><b><u>II. Drive Demand for Energy Upgrades</u></b></p> <p>A. Increase awareness of building performance, energy efficiency, and incentives</p> <p>B. Ease navigation through energy efficiency program processes (convenience)</p>		<p>A) - Refine customized messaging/branding based on local motivations</p> <ul style="list-style-type: none"> <li>- Conduct educational workshops and tours</li> <li>- Develop and distribute educational collateral</li> <li>- Develop media campaigns</li> <li>- Coordinate earned media opportunities</li> <li>- Maintain website and links to resources</li> <li>- Conduct educational outreach by providing presentations and exhibiting at community events</li> <li>- Partner with wide network of community groups to distribute energy efficiency messaging</li> <li>- Create and promote customer testimonials</li> </ul> <p>B) - Provide personalized local customer service and guidance through program processes:</p> <ul style="list-style-type: none"> <li>- Staff consultation</li> <li>- Check in calls</li> <li>- Comprehensive technical and process assistance via free Energy Coach service</li> <li>- Connect leads with participating contractors</li> <li>- Continually improve website user experience</li> <li>- Work with localities to streamline permitting</li> </ul>	<p>A) - # workshops</p> <ul style="list-style-type: none"> <li>- # of community events</li> <li>- # ads run</li> <li>- # of pieces of collateral distributed</li> <li>- # of earned media spots</li> <li>- # of customer testimonials promoted</li> <li>- # of customer contacts (phone, web sign up, email)</li> </ul> <p>B) - % of leads converted to completed upgrades</p> <ul style="list-style-type: none"> <li>- # of customer interactions (phone, web sign up, email)</li> <li>- # customers served by Energy Coach</li> <li>- # of leads contact participating contractor</li> <li>- # minutes spent per website visit</li> </ul>	<p>1. Increase customer knowledge and awareness of building performance</p> <p>2. Increase number of property owners that successfully complete energy upgrades to:</p> <ul style="list-style-type: none"> <li>- Save energy and avoid associated environmental impacts</li> <li>- Create local jobs</li> </ul>	<p>1. % of survey respondents aware of basic building performance concepts, % of survey respondents intending to complete building improvements</p> <p>2. # of energy upgrades completed, % energy saved, # GHG emissions avoided, # jobs created (direct/indirect)</p>
<p><b><u>III. Prepare Local Workforce to Meet Demand</u></b></p> <p>A. Increase building performance skills and certifications in local building trades</p> <p>B. Attract contractor participation in utility and financing programs</p> <p>C. Increase contractor business capacity</p>		<p>A) - Offer discounted technical trainings</p> <ul style="list-style-type: none"> <li>- Coordinate/promote local utility trainings</li> <li>- Conduct contractor networking and input sessions</li> <li>- Provide local technical advice and mentoring via free Energy Coach service</li> </ul> <p>B) - Recruit local contractors through personalized outreach</p> <ul style="list-style-type: none"> <li>- Work with local trade organizations to identify and target strong candidates for participation</li> </ul> <p>C) - Coordinate sales, finance, marketing and business model trainings</p>	<p>A) - # of trainings coordinated</p> <ul style="list-style-type: none"> <li>- # of local building professionals trained</li> <li>- # of local building professionals who attain BPI or other certification</li> <li>- # of contractor contacts to Energy Coach</li> </ul> <p>B) - # contractors participating in EUC and emPowerSBC</p> <ul style="list-style-type: none"> <li>- % increase in participation over time</li> </ul> <p>C) # of trainings coordinated</p> <ul style="list-style-type: none"> <li>- # of local building professionals trained</li> </ul>	<p>1. Grow local building performance businesses and create jobs</p> <p>2. Create sustainable local building performance market</p>	<p>1. # of new employees hired at participating firms, # of layoffs avoided</p> <p>2. # of local contracting companies that offer building performance services</p>
<p><b><u>IV. Inform Future Financing Programs/Products to Enable Lasting Market Transformation</u></b></p> <p>A. Increase EE loan and project dataset to assist private sector, State and national strategies</p> <p>B. Improve general understanding of effective program design through lessons learned</p>		<p>A) - Increase volume of projects financed to produce greater sample size</p> <ul style="list-style-type: none"> <li>- Gather and analyze all emPower loan performance from credit unions and project data from contractors</li> </ul> <p>B) - Monitor and evaluate program activities to inform program improvements (i.e. marketing, application process, contractor management, etc.)</p> <ul style="list-style-type: none"> <li>- Produce and share information on best practices and challenges.</li> </ul>	<p>A) - % building energy saved</p> <ul style="list-style-type: none"> <li>- # energy upgrades financed</li> <li>- % loan defaults</li> <li>- % applicants declined</li> <li>- aggregated applicant underwriting statistics</li> </ul> <p>B) - # people registering for events via different marketing strategies</p> <ul style="list-style-type: none"> <li>- # people contacting contractors via different marketing strategies</li> <li>- output metrics listed in section II and III</li> </ul>	<p>1. Determine whether EE loans perform well enough to be considered a separate asset class (beyond scope of program)</p> <p>2. Improve program design and effectiveness</p> <p>3. Inform others who wish to replicate program</p> <p>4. Help other programs avoid pitfalls</p>	<p>1. New asset class (Y/N)</p> <p>2. % increase in emPowerSBC loans over time</p> <p>3. # programs developed using program model</p> <p>4. % increase in loans over time in like programs</p>