



## Home Performance with ENERGY STAR®

### **Dear Participating Home Performance Contractors and Program Partners,**

NYSERDA is very pleased to share with you news of improvements to the NY Home Performance with ENERGY STAR program that have been developed in recent weeks. The improvement effort had some 25 staff members from functional areas across NYSERDA, working with contractors and other stakeholders, tasked with making it "possible for 95% of customers to move from deciding to use our program to an approved contract offer within one week." The improvements summarized below are being rolled out by July 18, except as noted.

**Objective: *Make the audit application for a home energy assessment clear, fast, and simple***

**Result:** A streamlined online and paper application that a customer can complete in a few minutes, without assistance and without attachments, with approval in less than one business day.

**How:**

- Removed questions that were unclear to applicants and provided little value at time of audit application
- Simplified the household income question (now automated on the online application and no longer requires most customers to reference tables)
- Removed requirement for uploading energy usage data at the time of the audit application

**Objective: *Streamline and simplify the NYSERDA/CSG work scope review***

**Result:** Changes to the work scope submission and approval process will greatly reduce the time it takes for most projects to receive approval from 40 minutes to 5 minutes - with 90%+ of approvals expected to take place within one business day. Contractors will be able to use the instantaneous feedback available through the Eligibility Screening Tool in the NY HP Portal to understand the incentive and financing eligibility of the project before submitting to CSG for approval. The number of in-person visits to the home for required signatures following the audit can be reduced to one.

**How:**

- Automated review by the Eligibility Screening Tool of most modeling data points and CSG coordinator review limited to an estimated five minutes per job
- Quality control and quality assurance review of other work scope elements after the work is completed
- A short guide to project installation and service quality expectations has been

developed

- An easy-to-read Eligibility Screening Tool report summarizing the Program's approval of the submitted project, provided to CSG, EFS, customers and contractors; eliminates the need for a signed contract for work scope approval and replaces the Customer Information Form and Certificate of Completion Signature Page, reducing the number of times many contractors find themselves returning to the home
- Additional pre-qualified measures anticipated to be available in mid-August include: an expanded insulation rule, duct insulation, air source heat pump water heaters, LEDs, boiler reset controls, and ENERGY STAR water heaters
- NY HP Portal system speed improvements
- Pilot of this new work scope submission and approval process with a limited number of contractors beginning on July 30 with full launch planned for mid-August; training webinar for contractors to be scheduled for early August

***Objective: Ensure the financing approval process works in tandem with the rest of the program processes to reduce approval time***

***Result:*** Increased rate of customer approval, decreased documentation requirements, and faster processing times that match work scope review.

***How:***

- Modification of the GJGNY Loan Underwriting Standards for Tier 2 which will result in faster loan decisions and increased levels of loan approvals
- Adoption of the 540 minimum credit score and elimination of the requirement for utility bill payment history for all but the lowest credit scores to streamlined the loan approval process; analysis showed a small percentage of loan applicants would have been affected by this minimum credit score; review of recently denied loans found that many would be approved under the new standards
- Planned notification to applicants whose applications were denied within the past 60 days but will now qualify under the revised underwriting guidelines; other applicants denied a loan in 2014 can request that the application be reconsidered under these new guidelines by contacting EFS
- Streamlined Credit and Assisted Subsidy Applications by removal of the requirement for a signed HPwES contract as a condition for loan approval; available upon launch of the new Eligibility Screening Tool report

***Objective: Help get started by making it clear and simple to determine which program to use, understand how to use it, and next action steps***

***Result:*** Concise and simple information presented on the residential energy efficiency program offerings delivered through our web platforms, hotline and marketing materials. A clear path for consumers to determine which program to use, understand how the program works and what steps to take next.

***How:***

- Provided clear paths for consumers to access residential energy efficiency information via NYSERDA home page
- Developed an automated self-selection chart comparing the offerings of Home Performance, Assisted Home Performance and EmPower directing consumers

into the appropriate program

- Adopted language making Home Performance, Assisted Home Performance, and EmPower offerings concise and simple; provided clear next steps and call to actions inside all program web copy

**Objective: Make selecting a home performance contractor easy to perform**

**Result:** Simplified the web interface to provide a straightforward contractor selection site that minimizes customer confusion, increases customer engagement, and increases the number of leads to contractors.

**How:**

- Limited the display to 10 contractors per page
- Enhanced the contractor profiles to describe services contractors offer using consistent terminology to assist the customer select contractors
- Enhanced geocoding capabilities to better define service territories through customized mapping (available now upon request by emailing [hpwes@nyserda.ny.gov](mailto:hpwes@nyserda.ny.gov))
- Add icons to make clearer to customers the volume of work that a contractor has completed in the program in the past 12 months (expected late July)

 One leaf= Participating Contractors in good standing.

 Two leaves= Participating Contractors in good standing with production that exceeds minimum production standards. Currently this is over 24 Program jobs per year or over \$100,000 worth of production in the Program.

 Three leaves= Participating Contractors in good standing with production that exceeds the median number of jobs. (49 of 234 contractors in 2013)

- Employ a "round robin" selection tool to improve conversion rates by reducing the "choice burden" associated with selecting from a list (expected Fall 2014)

**Implementation**

A webinar will be held on July 18 at 10:00 am for contractors and program partners to learn more about these changes and provide an opportunity for your feedback.

The teams working on each of these objectives simulated the process end-to-end from the customers' and contractors' perspective to uncover additional interdependencies and make sure all changes work in combination to deliver the goal. Nonetheless, we anticipate that there will be some bumps encountered during the roll-out of these changes. As we roll out these improvements, we want your feedback. We aim to keep evolving our work to better support your work in the field. Please let us know what works well and where you see opportunities for improvement. The best way to share feedback is to email us at [hpwes@nyserda.ny.gov](mailto:hpwes@nyserda.ny.gov).

The new audit application is now available. Customers will no longer need to submit energy usage information as part of the application and contractors will need to submit

the information when they claim the audit incentive. If the customer previously submitted the energy usage information through the audit application process, it will be available for the contractor's use in the Portal in the audit claim stage. Instructions for contractors for the audit application and for claiming audit incentives are available on the [Contractor Support Site](#).

Use of the on-line audit application is strongly encouraged. Its use will allow approval within one business day.

***We expect improvements to be ongoing; we will continue to work across functions to improve the way we do business for our customers, contractors and ourselves.***

Future program enhancements being planned for this year include:

- A combined online credit and subsidy application with provision for electronic signatures by early September
- Fully automated project approval and loan document generation process; contractors will be able to get full project approval and generate loan documents on a 24/7 basis
- An option that will allow loan and subsidy applicants to authorize EFS to obtain income documentation directly from the IRS or a credit bureau, eliminating the need for the applicant to provide it
- Availability of additional energy modeling software tools (currently being tested)
- New quality assurance system supported by materials and installation guidelines to assess the overall quality of the work rather than focusing only on areas needing improvement
- Better integration of Home Performance and EmPower

Thank you to the NYSERDA team, CSG, EFS, BrandCool, the CBOs and our participating Home Performance contractors for devoting your time and energy to achieving the very significant improvements to our Program.

We look forward to building on this momentum in the months ahead.

Sincerely,

**The NY Home Performance with ENERGY STAR Program Team**

### **About NYSERDA**

NYSERDA, a public benefit corporation, offers objective information and analysis, innovative programs, technical expertise, and funding to help New Yorkers increase energy efficiency, save money, use renewable energy, and reduce reliance on fossil fuels. NYSERDA professionals work to protect the environment and create clean-energy jobs. NYSERDA has been developing partnerships to advance innovative energy solutions in New York State since 1975. To learn more about NYSERDA's programs and funding opportunities, visit [nyserdera.ny.gov](http://nyserdera.ny.gov) or follow us on [Twitter](#), [Facebook](#), [YouTube](#), or [Instagram](#)



