Weatherize Upper Valley Ground Rules

For Partnership between Weatherize Contractors, Volunteers, and Vital Communities

Good Faith Agreement – Our agreement here is not legally binding; we’re all operating under good faith that all partners involved in Weatherize Upper Valley:

- Are on the same team and are committed to the success of the program;
- Are working hard to uphold their responsibilities and roles in the program; and
- Are open and honest with all partners throughout the program.

Summary of Roles and Commitments of the Partners

<table>
<thead>
<tr>
<th>Weatherize Volunteers</th>
<th>Weatherize Contractors</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Conduct broad community outreach seeking new participants</td>
<td>• Attend launch event</td>
</tr>
<tr>
<td>• Regularly follow up with participants, according to Weatherize suggested follow-up protocols</td>
<td>• Ongoing communication with volunteers and VC</td>
</tr>
<tr>
<td>• Give residents accurate expectations about Weatherize based on guidance from contractors and Vital Communities</td>
<td>• Timely response to leads</td>
</tr>
<tr>
<td></td>
<td>• Free home visit with proposal containing all required info (per RFP)</td>
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<tr>
<td></td>
<td>• High quality customer service and value</td>
</tr>
<tr>
<td></td>
<td>• Track and regularly report on lead status</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Vital Communities</th>
<th>Efficiency Vermont</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Provide support in coordination and planning</td>
<td>• Letters to past HPwES customers</td>
</tr>
<tr>
<td>• Coordinate with other Weatherize communities</td>
<td>• Baseline data to help set campaign goals</td>
</tr>
<tr>
<td>• Create outreach material &amp; maintain website</td>
<td>• Provide and/or edit campaign outreach material</td>
</tr>
<tr>
<td>• Manage outreach fund</td>
<td>• Provide data from all Weatherize projects at close of program</td>
</tr>
<tr>
<td>• Oversee data tracking</td>
<td>• General program advising</td>
</tr>
<tr>
<td></td>
<td>• Mediation among partners as needed</td>
</tr>
</tbody>
</table>

Communicating with Each Other

Regular Check-In Calls – Beginning DECEMBER 2017. At least one representative from the volunteer team, the partner contractor, and Vital Communities will be present on EVERY scheduled check-in call. Calls will occur regularly as needed (we recommend every 2-3 weeks).

Google Drive – All partners will use Google Drive to track participants and store/share campaign materials. Anyone experiencing difficulties accessing Google Drive will contact Paige Heverly for help resolving the issue. Paige Heverly, Paige@VitalCommunities.org or 802.291.9100 x114.

Google Drive will contain two kinds of participant tracking spreadsheets:

1. The **People Tracker** – One People Tracker per team, maintained by the volunteer team, and updated weekly by Vital Communities with status report from the contractors.
2. The **Lead Tracker** – One Lead Tracker per contractor, with a separate tab for each team served, only accessible to that contractor and to Vital Communities.

**Email or Phone as Needed** – Our shared Google Drive folders contain all relevant team contact information. Communication between check-in calls among volunteers, contractors, and Vital Communities is encouraged as needed.

**After the Campaign Deadline (May 31)** – Contractors will send monthly status to Vital Communities and the volunteer team updates until all jobs are completed.

**Communicating with Weatherize Participants**

**Direct Residents to VitalCommunities.org/Weatherize** – Partners will encourage residents to complete an online form to sign up and then complete a home energy questionnaire. This will help us manage and track the flow of new leads.

### Breakdown of Communication with Participants throughout the Campaign

<table>
<thead>
<tr>
<th>Step 1: Sign Up - Participant “signs up” online, at an event, or verbally with a volunteer</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Online Sign Up Process</strong></td>
</tr>
<tr>
<td>• There is an online form where residents can sign up. The new contact hits submit and automatically receives a welcome email with instructions for next steps</td>
</tr>
<tr>
<td>• Vital Communities receives an automatic email notification of a new sign up</td>
</tr>
<tr>
<td>• Vital Communities adds their name and information to the People Tracker</td>
</tr>
<tr>
<td><strong>Paper Sign Up Process</strong></td>
</tr>
<tr>
<td>• Volunteer manually enters contact information into the online form (save paper sign-up sheet incase information is mistyped) and participant receives automatic welcome email.</td>
</tr>
</tbody>
</table>

**Follow Up**

- After one week without action: **Volunteers send follow-up email (pre-drafted)**
- After two to three weeks without action: **Volunteers re-send email AND/OR make a phone call**

*Continued outreach as needed/appropriate until the participant completes home energy questionnaire.*

<table>
<thead>
<tr>
<th>Step 2: Home Energy Questionnaire followed by Step 3: Professional Phone Consultation – Participant submits their questionnaire online or on paper. Selected contractor(s) receive the questionnaire and arrange for a phone consultation.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Online Home Energy Questionnaire Process</strong></td>
</tr>
<tr>
<td>• Participant enters home energy information, selects one or more contractors, hits submit.</td>
</tr>
<tr>
<td>• Participant automatically receives thank you email with a copy of their home energy questionnaire and information about next steps.</td>
</tr>
</tbody>
</table>
• The contractor automatically receives an email with the participant’s home energy questionnaire and contact information.
• Vital Communities receives an automatic email notification that the participant has completed their home energy questionnaire.
• Vital Communities updates the People Tracker with this new information

**Paper Home Energy Questionnaire Process**
• Participant prints questionnaire from website or requests Vital Communities sends a paper version
• Participant delivers paper questionnaire to volunteer or Vital Communities
• Volunteer or VC manually enter information from paper version into the online questionnaire
• Volunteer or VC save paper copy in a safe place until the end of the program (at which point all collected questionnaires will be securely disposed)

**Follow Up**

Immediately after profile is received by contractor:
- Vital Communities updates the appropriate People Tracker
- **Contractor(s) reach out to participant within three business days** – updating Lead Tracker with note about contact attempts

One week after profile is submitted:
- Vital Communities updates the People Trackers with lead status from contractors (e.g. haven’t made contact, phone conversation complete, home visit scheduled)

Ten days to two weeks after profile submitted – **still no home visit scheduled:**
- **Volunteers send check-in email (pre-drafted)**

*Participants must request a home visit before March 31*

One month prior to March 31
- Volunteers send reminder about upcoming deadline **(pre-drafted)**

Two weeks prior to March 31
- Volunteers send reminder about upcoming deadline **(pre-drafted)**

One week prior to March 31
- Volunteers send reminder about upcoming deadline **(pre-drafted)**

*Continued outreach as needed/appropriate until a home visit is scheduled or the participant drops out.*

**Step 4: Home Visit and Quote** – Contractor(s) schedule and complete home visits and deliver a proposal to the participant within one week (unless the participant has been given an alternative expectation)

One week after home visit:
- Contractor sends proposal to participant and updates their Lead Tracker
- Vital Communities updates the appropriate People Tracker.
**Step 5: Sign an Agreement with a Contractor** – After receiving a proposal from the contractor, the participant must sign an agreement by May 31 to be eligible for Weatherize prizes.

One week from date of proposal delivery:
- Volunteers send follow up email to check in *(pre-drafted)*

Two to Three weeks from proposal delivery, if still no contract:
- **Volunteers re-send email AND/OR make a phone call**

  *Continued outreach as needed/appropriate until an agreement is signed or the participant drops out*

One month prior to May 31
- Volunteers send reminder about upcoming deadline *(pre-drafted)*

Two weeks prior to May 31
- Volunteers send reminder about upcoming deadline *(pre-drafted)*

One week prior to May 31
- Volunteers send reminder about upcoming deadline *(pre-drafted)*

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**After the Signed Agreement**

**Project Completion Schedule** – Partner contractors will strive to schedule all jobs for completion within 90 days of signing contracts and will clearly communicate to the volunteer team and all customers an expected timeframe for project initiation and completion. The contractors will endeavor to remain true to that timeframe and alert the volunteers and customers to any delays. Contractors must check in monthly after the program ends to give Vital Communities status updates on all participants’ projects.

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**Contractor Collaboration and Managing Demand**

**Multiple Contractors, Collaborative Marketplace** – Partner contractors understand that Weatherize is an open market situation. Customers are allowed to compare contractors and/or work with contractors outside of the Weatherize program. In all situations, partner contractors will be gracious and professional in dealing with one another, the volunteer team, and potential customers.

**Handling Too Much Demand** - If a community or a contractor are overwhelmed with leads, Vital Communities will work with the volunteer teams and contractors using one or more of the following strategies:

- Request support from other contractors to take on some of the demand (whether contractors from the same team or from a neighboring team).
- Communicate with participants about why we are experiencing a backlog.
- Work with contractors to efficiently schedule home visits in a concentrated area.
• Request the volunteer team pause outreach efforts for the time being.
• Other ideas most welcome.

**Ensuring Fairness within a Competitive Market** – Weatherize participants will be free to work with any contractor they choose. Vital Communities will work with the partner contractors to ensure this process is as fair as possible. Likely strategies:

• Re-arrange and randomize the order of contractors listed in the request form.
• Ensure language describing each contractor in the form is clear and consistent in style across all contractors.
• Work with contractors who appear to be receiving and/or retaining relatively fewer leads to identify possible contributing factors.
• Encourage ongoing communication between all partners to address issues and concerns early and collaboratively.

**Handling Problems**

**Flagging Potential Problems** – (e.g. resident complains they didn’t get a call back)

• All concerns/problems will be raised by the volunteer team, the contractors, and/or Vital Communities immediately and shared with the rest of the team or appropriate team members by email or on a check-in call.
• Partners will raise concerns with Vital Communities if they are uncomfortable raising concerns directly with the other partners for any reason.
• All partners will assume best intentions, and assume there is a reasonable explanation, before passing any judgment regarding complaints/problems.

**Addressing Problems**

• Partners will keep Vital Communities informed of any problems and any efforts to address complaints/problems.
• Vital Communities will act as a mediator between the partners if necessary in discussing and resolving any problems that arise.
• Partners will treat problems with appropriate discretion and aim to resolve complaints/problems quietly and respectfully (e.g. no finger-pointing op-eds in the Valley News, please).
• Partners will work together to address/resolve any problems that arise.

**Other Ground Rules:**

*Volunteers and contractors are encouraged to propose additional ground rules in the next month leading up to the campaign launch.*
Weatherize Upper Valley – Message Points

ALWAYS encourage people to visit the website:

VitalCommunities.org/Weatherize

What is Weatherize?
Our ___ towns are teaming up with local home energy contractors and Vital Communities to help you save money and stay warm by weatherizing your home. We’re on a mission to DOUBLE the number of homes weatherized in our ___ towns each year. Here’s how:

- **Qualified local contractors** – Our Weatherize partner contractors are experienced and certified by the Building Performance Institute.
- **Free and Easy** – FREE professional home visits and energy improvement quotes for Weatherize participants. Typically, homeowners may pay $400 or more for a home energy audit before receiving a quote.
- **We’ve got your back** – Once you sign up, our volunteer team will check in with you periodically to help you through the process and make sure you have what you need to make the right decision for your home.
- **Great Prizes** – Sign a contract with a Weatherize partner contractor by May 31 and be entered to win up to $500 toward the cost of your home energy project – in addition to rebates of up to $2,500 from Efficiency Vermont.

How to Participate in Weatherize Upper Valley

1. **Sign Up**
   Interested in Weatherize? Let our volunteer team know so we can keep you in the loop and help you through the process. Sign up online at VitalCommunities.org/Weatherize.

2. **Home Energy Questionnaire**
   Before talking to a Weatherize contractor, it helps to have some basic information about your home on hand, including square footage and historic heating fuel use.

   - Fill out your home energy questionnaire online at VitalCommunities.org/Weatherize or request a paper copy from the volunteer team.
   - You will need to fill out your questionnaire and request a home visit from a partner contractor by March 31 in order to be eligible for Weatherize prizes.
   - Most of the questionnaire is quick and easy to fill out. Two of the questions may require you to do a little homework first:
     - *Square footage of your home* - Your town listers will be happy to look this up for you
     - *Heating fuel use* - Call your fuel dealer – we’ve already talked to most local fuel dealers about Weatherize and asked them to be ready to help customers like you get the information you need – see questionnaire for details
• Fill out the questionnaire as best you can - it’s OK to leave blank sections if you need to.

When you submit your questionnaire (online or on paper) it will be sent to one or more Weatherize contractors of your choice. They will contact you within three business days to set up a phone consult (longer if you submit a paper version). You’ll receive a copy of your Home Energy Questionnaire as well for your reference.

• REMEMBER: you need to submit your questionnaire by March 31 in order to receive a free home visit!

3. **FREE Professional Consultation, Home Visit, and Quote**
   We recommend you start by inviting just one Weatherize contractor to conduct a home visit. When your contractor reaches out to schedule a home visit, they may ask some follow up questions to make sure they are a good fit for your needs. The home visit should last 60-90 minutes and you’ll want to be present. After the visit, your contractor will send a proposed scope of work and quote, typically within two weeks.

4. **Commit to a Project by May 31**
   Once you receive your quote, schedule time with your contractor to talk it over. With your contractor’s help, you can decide to tackle all, some, or none of the proposed work scope. You contractor can also direct you to financing options. Sign an agreement with a Weatherize contractor by May 31 and be entered to win up to $500 toward the cost of your home energy project. You do not need to complete your project by May 31 to be eligible.

OTHER MESSAGE POINTS

Your **volunteer team and Vital Communities are to help.** No need to do this alone!

- Checking in with you along the way
- Helping you understand your options
- Connecting you with information about rebates and financing programs
- Connecting you with neighbors who have been through this process before

**Great Prizes.** Commit to a home energy project by May 31 for a chance to win $500 toward the cost of your project.

- **RULES**
  - Winners will be selected at random after May 31, 2018 from among all Weatherize participants who have signed an agreement with a Weatherize contractor to complete a home energy project that qualifies for Efficiency Vermont Home Performance with ENERGY STAR rebates.
  - Winners will receive their prize upon completing their home energy project
  - No need to worry about timing issues with respect to securing a loan. If you are a prize winner, Vital Communities will work with you, your contractor, and your lender to ensure your prize money ends up in the right hands at the right time and goes toward the cost of your project.

**Increased Comfort**

- Almost anyone who has completed a home energy project will tell you they were amazed by the increase in comfort – warmer in winter, cooler in summer, quieter living spaces (less noise from the street).
- You can’t possibly know how UN-comfortable your home is until you experience what it’s like to sit on your couch in January in an air-sealed and well-insulated home. Say goodbye to drafts and cold spots!
**Cost and Savings** – Based on Efficiency Vermont data from across the state.

- $7,800 average cost of weatherization improvements - that’s BEFORE applying any rebates ($1,500 average rebate for these projects)
- Resulting in 26% average energy savings

**Typical Measures** –

- Most Home Performance with ENERGY STAR projects focus on air sealing and insulation. These measures are highly cost effective.
- Most projects focus on air sealing and insulation in the home’s basement and attic, where most leakage occurs and where unfinished spaces allow for easy and cost effective improvements.
- Replacing windows is commonly NOT a cost effective way to improve energy efficiency, unless you were planning to replace those windows anyway for a different reason. Because windows are so expensive, it is often better to use that money for more air sealing and insulation instead.

In the coming weeks we will be updating this resource with more talking points:

- More definitions and typical measures
- Other message points as needed
- Round 1 final results
Volunteers from Chester and the Springfield Energy Committee are teaming up with Vital Communities and local home energy contractors to help you save money and stay warm by weatherizing your home.

Free and Easy. Receive a FREE professional home visit and quote from a qualified local contractor. Homeowners typically pay $400 or more for a home energy audit before receiving a quote.

Experienced Local Contractors. Our partner contractors are certified by the Building Performance Institute and qualified with Efficiency Vermont’s Home Performance program.

Your Volunteer Team is Here to Help. We’ll check in periodically to help you through the process and make sure you have what you need to make the right decision for your home.

Contact us anytime by reaching out to your volunteer team:
Springfield Contact: Char Osterlund, 802-885-5115 or charmf@vermontel.net
Chester Contact: Tim Roper, 802-875-2485, tj.roper01@gmail.com

Get Started at VitalCommunities.org/Weatherize

Step 1
Sign Up online or at an event

Step 2
Complete Questionnaire by March 31

Step 3
FREE professional consult, home visit, and quote

Step 4
Sign a contract with a Weatherize partner contractor by May 31

Everyone Wins!
Enjoy lower bills, a warmer home, & Weatherize Prizes

Kick-Off Event - Thurs, Jan. 25, 6pm
at Springfield Congregational Church
(snow date Feb 1 – call 207-624-2012 to confirm)
Meet Your Weatherize Partner Contractors

W.A.R.M. VT
Montpelier, VT
Founded in 2008
BPI since 2008
W.A.R.M. VT is a full service weatherization contracting business. We conduct the initial energy audit, perform all needed air sealing, utilize any insulation product desired by the client, diagnose and mitigate moisture issues, and provide all of the products and services needed to make your home more safe, comfortable, and energy efficient.

Vermont Foam Insulation
Chester, VT
Founded in 2006
BPI since 2008
Vermont Foam Insulation (VFI) started as a spray foam contractor in 2006. In the years since, we have grown substantially and now offer a full gamut of insulation services and energy efficiency contracting. Our goal is to increase the efficiency, durability, and comfort of each building that we work on.

Farnum Insulators
Putney, VT
Founded in 2003
BPI since 2007
Serving Vermont, New Hampshire and Massachusetts since 2003, Farnum Insulators has become the area's trusted leader in home weatherization. With a team of experienced building analysts, trained and certified installers, and thoughtful consultants, Farnum Insulators tailors its projects to the unique needs of each home and owner, to assure maximum comfort and efficiency.

What does it mean to “Weatherize” your home?

Most weatherization projects focus on air sealing and insulation, typically the two most cost effective ways to reduce drafts, increase comfort, and reduce energy costs. All Weatherize Upper Valley home energy projects will be part of Efficiency Vermont’s Home Performance with ENERGY STAR® program.

Efficiency Vermont provides up to $2,500 in incentives to help Vermonters pay for home energy efficiency improvements completed by a qualified contractor, including all Weatherize Partner Contractors.

Attractive Financing Available. Including lower interest rates for low and middle income earners.

### Typical Home Performance with ENERGY STAR® Projects in Vermont
(data provided by Efficiency Vermont)

<table>
<thead>
<tr>
<th>Improvements Made</th>
<th>Air sealing and insulation, especially in the basement and attic</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cost</td>
<td>$7,800 – Average cost of energy efficiency improvements in our region (before incentives) with attractive financing rates available</td>
</tr>
<tr>
<td>Benefits</td>
<td>$1,500 – Average rebate from Efficiency Vermont (up to $2,500 possible) 26% – Average energy savings as a result of weatherization projects Increased comfort – thanks to reduced drafts and better insulation</td>
</tr>
</tbody>
</table>

Get Started at VitalCommunities.org/Weatherize
Weatherize Home Energy Questionnaire

Complete this form as best as you are able before requesting your free walkthrough with our participating contractors. If you need assistance, contact Paige@VitalCommunities.org, 802.291.9100 x114.

Mail completed form to: Vital Communities (Weatherize), 195 N Main Street, White River Junction, VT
-OR- Complete this form online at VitalCommunities.org/Weatherize

Basic Information

Name: ____________________________________________________
Email: __________________________________________________
Physical address of your home: ________________________________
Mailing address, if different: _________________________________
Phone Number: ____________________________________________

Home Characteristics

Home Type

( ) Single Family
( ) Mobile Home
( ) Townhouse/Duplex
( ) Duplex or Apartment

Own or Rent? ( ) Own ( ) Rent

Approximate square feet of heated space: ________________

Number of heated stories: ( ) 1 ( ) 2 ( ) 3

Year home was built: ________________

Age of roof: ________________

Type of roof: ( ) Metal ( ) Shingle ( ) Slate ( ) Other: ________________

House insulation level: ( ) Original Insulation ( ) Additional Insulation ( ) Well-Insulated

Foundation:

( ) Full basement ( ) Slab ( ) Gravel/Dirt
( ) Crawlspace ( ) Unfinished
Is there attic access?

( ) Yes  ( ) No
( ) Yes, but bring a ladder  ( ) Don't know

**Occupied?** ( ) Year Round  ( ) Seasonal

Symptoms of an energy inefficient home (check all that apply)

[ ] Ice-dams  [ ] Cold drafts
[ ] Frozen pipes  [ ] Wet basement
[ ] Respiratory illness in the winter  [ ] High energy bills
[ ] "Sweaty" windows in winter  [ ] Inefficient heating system
[ ] Mold/mildew

Other energy efficiency concerns (or comments about the information provided above):

Heating Information

**Heating System Type** (Indicate primary and secondary if applicable)

( ) Warm air furnace (ducts distribute heated air)  ( ) Radiant floor heating
( ) Hot water boiler (pipes carry heated water)  ( ) Air source heat pump
( ) Steam boiler (pipes carry steam)  ( ) Ground source heat pump
( ) Woodstove  ( ) Other: ____________
( ) Space heater/room heaters

**Heating Fuel Type** (Indicate primary and secondary if applicable)

( ) Oil  ( ) Electricity (heat pumps)
( ) Propane  ( ) Kerosene
( ) Wood (cord)  ( ) Solar
( ) Wood (pellets)  ( ) Other: ____________
( ) Electricity (resistance/baseboard)

**Age of heating system(s) (in years):** ________________

**Average fuel price per unit (ex. $/gallon, $/cord) for heating system(s)?:** ________________
Heating Fuel Delivery Records

Provide specific delivery dates and actual number of gallons/cords/tons/therms of fuel delivered during the past three years (NOT just an annual total).

- If you do not have this information, your fuel dealer should be able to provide it.
- If you heat with cord wood and do not have it delivered by the cord, please write in the estimated number of cords burned during each of the past three years.

<table>
<thead>
<tr>
<th>Primary Heating Fuel</th>
<th>Secondary Heating Fuel</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delivery Date</td>
<td>Delivery Date</td>
</tr>
<tr>
<td>Amount of Fuel Delivered (e.g. 280 gallons)</td>
<td>Amount of Fuel Delivered (e.g. 280 gallons)</td>
</tr>
</tbody>
</table>

Any comments regarding heating system information (e.g. delivery notes or clarifications):

Estimated monthly electricity consumption for heating (in kWh), if applicable: ______________

Water Heating

Water heating system type(s). Indicate primary and secondary, if applicable.

- Tankless coil direct inside boiler
- Storage tank indirect from boiler
- Storage tank with self-contained, vented burner
- Solar hot water
- On-demand or instantaneous
- Heat pump hot water heater
- Other: __________

What is your water heating fuel? Indicate primary and secondary, if applicable.

- Oil
- Propane
- Wood
- Electricity
- Kerosene
- Solar
- Other: __________
Age of water heating system(s): ______________________________

Water heater tank size(s): ________________________________

Is the water heater tank wrapped? ( ) Yes ( ) No

Are the water heater pipes wrapped? ( ) Yes ( ) No

Estimated monthly electricity consumption for water heating (in kWh), if applicable: ______________

Who is/are your fuel dealer(s)?: ___________________________________________________________

Do you have smoke detectors on each floor? ( ) Yes ( ) No

Do you have carbon monoxide detectors on each floor? ( ) Yes ( ) No

Oven fuel type: ( ) Electric ( ) Propane

Cooktop fuel type: ( ) Electric ( ) Propane

Dryer fuel type: ( ) Electric ( ) Propane

Do you have any renewable energy power systems installed at your home? ( ) Yes ( ) No

If yes, indicate what kind of system and its installed kW rating: _______________________________

Contractor Follow Up

1. We will send your Home Energy Questionnaire to one or more contractors of your choosing, who will follow up to discuss your options.

2. If the contractor(s) believe your home is a good candidate for cost-effective home energy improvements, and you both feel their company is a good match for your needs, you can request a free home visit. After the home visit, the contractor will send you a proposal including a scope of work and estimated cost.

Select the Weatherize partner contractors to receive your Home Energy Questionnaire below.

<table>
<thead>
<tr>
<th>Springfield-Chester Partner Contractors</th>
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</thead>
<tbody>
<tr>
<td><strong>Weatherization and Renovation of Montpelier</strong> Montpelier, VT Founded in 2008 BPI since 2008</td>
</tr>
<tr>
<td><strong>Farnum Insulators</strong> Putney, VT Founded in 2003 BPI since 2007</td>
</tr>
<tr>
<td><strong>Vermont Foam Insulation</strong> Chester, VT Founded in 2006 BPI since 2008</td>
</tr>
</tbody>
</table>
Vital Communities cares about your privacy:

- The information about your home and energy use provided herein will be shared only with the contractor(s) you have selected above.
- Your contact information and the fact that you have completed a Home Energy Questionnaire will be shared with Vital Communities and your town’s volunteer team.
- Your town’s volunteer team will be following your progress and reaching out with support and encouragement along the way. You can request at any time to be removed from your volunteer team’s contact list.

By submitting this form, you acknowledge that you have read and understand the above statement regarding how information from your Home Energy Questionnaire will be shared.

Mail completed form to:
Vital Communities (Weatherize)
195 N Main Street, White River Junction, VT 05001

The Weatherize Home Energy Questionnaire was produced by Vital Communities.
For more information about Weatherize Upper Valley, visit VitalCommunities.org/Weatherize or contact the Energy Program at Energy@VitalCommunities.org or 802.291.9100 x114
Weatherize Kick-Off Event Guide

The kick-off will be your largest event. One joint event per team. Anyone and everyone who has expressed interest in the campaign should be there. Make sure to mention there will be refreshments!

OUTCOMES:

1. Identify neighbors and friends who are also curious about weatherization
2. Attendees learn the facts and leave with accurate expectations
3. Attendees sign up and are added to the People Tracker
4. Attendees go home and encourage their friends and neighbors to get involved

WHEN

- Advertise as 1.5 hours in length
- Day/Time (choose from the following)
  - Tuesday, Wednesday, or Thursday evening (no earlier than 6 pm)
  - Saturday morning, afternoon, or evening
  - Sunday afternoon

WHERE

- A public place people will be familiar with
- Plenty of parking
- Chairs and tables available on site
- Is there a rental fee? Are food/drink allowed?

WHO needs to be there (besides general public attendees)?

- An “MC” – One volunteer who will welcome everyone, introduce speakers, etc.
- Other Volunteers – Wear nametags so attendees can easily identify you
- Partner Contractors – Wearing company logos and nametags, staffing tables before and after presentation
- Champions – Residents who have completed a home energy project already willing to wear a nametag and/or give brief testimony as part of the presentation
- Vital Communities – Will give brief overview of Weatherize and the Home Performance with Energy Star program.

WHAT needs to be there?

- Tables (does your venue have tables you can use?)
  1. Sign-In Table
2. **Weatherize Campaign Handouts Table** – extra handouts, including information about financing, energy efficiency, etc.

3. **Table(s) for Partner Contractors** – they will bring their own material

4. **Table for Vital Communities**

5. **Refreshments Table**

- **Food**
  - This can come out of your outreach budget and/or you can have your volunteers divide and conquer to provide drinks and snacks.

- **Nametags**
  - To identify your volunteer team and any “champions” in the room (Vital Communities will bring nametags for your team)

- **Projector, Screen, Computer with presentation slides, extension cords**
  - Vital Communities will provide anything not available at your venue

- **Enough Space/Chairs** – Plan on 30 to 120 attendees, depending on your community size. Vital Communities will help you decide how many chairs to set out.

**HANDOUTS** *(Vital Communities will design and print these materials for you)*

- **Kick-Off Event Handout** – Hand to everyone on their way in or place on every chair (will include program description, contact information for volunteers and contractors, web link, and other useful information)

- **Sign-Up Sheet** – Hand to everyone on their way in or place on every chair

- **Resource Table** – Anything else you’d like to provide (e.g. financing, energy efficiency)
  - Financing handout
  - Home Performance with Energy Star handout
  - Do-It-Yourself tips handouts
  - Case studies of local home energy projects
  - Anything else you want to provide

**Kick-Off Event Agenda**

**Team MC: Welcome and Introductions (10 min)**

- **Welcome**
- **Ask folks: “Can everyone hear me?”** Please let me know as we go if you have trouble hearing or seeing the presentation.
- **Housekeeping (bathrooms, exits, etc.)**
- **Thanks (sponsors, venue, food, other?)**
- **Recognize key people**
  - Ask volunteers to stand and wave
  - List partner contractors, ask them to wave, we’ll be hearing from them later
Ask anyone who has completed a home energy project already to stand and wave (they are great resources, too!)

- Briefly explain how the volunteers got involved in this campaign and why you are so excited about it
- Describe handouts – (have a copy of each handout ready to wave)
  - On your seat – handout & sign up form
  - Resource Table
    - Financing
    - Efficiency Vermont one pagers
    - Case Studies
- Review the agenda
  - About 30 minutes to hear about energy efficiency and the Weatherize program
  - Introduction of our partner contractors
  - Hear from champions
  - Q&A
  - Mingle time – stick around, talk with contractors/volunteers/champions/friends
  - SIGN UP on your way out! We’ll email you with next steps
- Introduce Vital Communities

Vital Communities: Home Energy and Weatherize Presentation (20-30 min)

- Who is Vital Communities
- Energy Efficiency 101 (define basic terms)
- Walk through the Home Performance with ENERGY STAR process for a generic project
- Touch on cost, benefits, and financing options
- Describe the process to participate in the Weatherize UV campaign, and the benefits

Vital Communities: Introduce the Contractors (8 min)
Each contractor gets a few minutes to introduce themselves and their company.

(IF APPLICABLE) Team MC: Introduce Champions to briefly share their story (10 min)
Identify one or two neighbors who have had energy work done and had a good experience. Each can speak for a few minutes about what work was done, why, and what the benefits have been.

Team MC: Moderate Q&A (15-20 min) – Vital Communities and Contractors respond

Team MC: Wrap Up

- Ask them to fill out their sign up form – reiterate next steps
- Ask them to tell their friends and neighbors

Encourage people to stick around, mingle, and chat with contractors (20-40mins)
## Summary of Results from Weatherize Upper Valley Round One – January through June 2017

### How Did You Hear About Weatherize?

<table>
<thead>
<tr>
<th></th>
<th>Ascutney Team</th>
<th>Connecticut River Team</th>
<th>Randolph Team</th>
<th>White River Team</th>
</tr>
</thead>
<tbody>
<tr>
<td>Weatherize Volunteers/Tables</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Newspaper</td>
<td></td>
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<tr>
<td>Word of Mouth</td>
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<tr>
<td>Radio/TV</td>
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<tr>
<td>Community Discussion List (listserv):</td>
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<tr>
<td>Vital Communities</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Other Newsletter</td>
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<td></td>
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<tr>
<td>Poster/Banner/Sign</td>
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### 2013-2015 Annual Average

<table>
<thead>
<tr>
<th>Team</th>
<th>Town</th>
<th>Audits</th>
<th>Project</th>
<th>Population</th>
<th># of Households</th>
<th>Mean HHD Income</th>
<th>Sign Ups</th>
<th>Leads</th>
<th>Contracts</th>
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<tbody>
<tr>
<td>Team A</td>
<td>Braintree</td>
<td>1</td>
<td>1</td>
<td>1,246</td>
<td>1,292</td>
<td>55,243</td>
<td>62</td>
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<tr>
<td></td>
<td>Brookfield</td>
<td>5</td>
<td>3</td>
<td>531</td>
<td>528</td>
<td>75,001</td>
<td></td>
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<tr>
<td></td>
<td>Randolph</td>
<td>14</td>
<td>9</td>
<td>4,768</td>
<td>1,910</td>
<td>58,750</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Team B</td>
<td>Bethel</td>
<td>5</td>
<td>3</td>
<td>1,919</td>
<td>821</td>
<td>59,851</td>
<td>51</td>
<td>29</td>
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<tr>
<td></td>
<td>Royalton</td>
<td>4</td>
<td>2</td>
<td>2,778</td>
<td>1,271</td>
<td>49,162</td>
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<tr>
<td></td>
<td>Sharon</td>
<td>7</td>
<td>2</td>
<td>1,521</td>
<td>597</td>
<td>75,532</td>
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<tr>
<td>Team C</td>
<td>Hartford</td>
<td>8</td>
<td>4</td>
<td>9,869</td>
<td>4,430</td>
<td>75,195</td>
<td>199</td>
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<tr>
<td></td>
<td>Hartland</td>
<td>11</td>
<td>4</td>
<td>3,397</td>
<td>1,460</td>
<td>73,665</td>
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<tr>
<td></td>
<td>Norwich</td>
<td>37</td>
<td>14</td>
<td>3,400</td>
<td>1,480</td>
<td>114,647</td>
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<tr>
<td></td>
<td>Thetford</td>
<td>24</td>
<td>14</td>
<td>2,589</td>
<td>1,099</td>
<td>88,526</td>
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<tr>
<td>Team D</td>
<td>Cavendish</td>
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<td>1,587</td>
<td>642</td>
<td>67,301</td>
<td>64</td>
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<td>15</td>
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<tr>
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<td>Reading</td>
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<td>1</td>
<td>789</td>
<td>284</td>
<td>74,197</td>
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<td>1,220</td>
<td>68,115</td>
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<tr>
<td></td>
<td>Windsor</td>
<td>10</td>
<td>6</td>
<td>3,504</td>
<td>1,448</td>
<td>53,387</td>
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</table>
**Vermont Weatherize Timeline and Monthly Checklist - 2018**

<table>
<thead>
<tr>
<th>October</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>□ Recruit volunteer team</td>
<td></td>
</tr>
<tr>
<td>□ Team meeting with Vital Communities</td>
<td></td>
</tr>
<tr>
<td>□ Assign volunteer roles and get organized as a team</td>
<td></td>
</tr>
<tr>
<td>□ Set up a team folder in Google Drive</td>
<td></td>
</tr>
<tr>
<td>□ Begin work on team outreach plan</td>
<td></td>
</tr>
<tr>
<td>□ Partner contractors identified</td>
<td></td>
</tr>
</tbody>
</table>

**PRE-LAUNCH**

<table>
<thead>
<tr>
<th>November</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>□ Whole team meeting with Vital Communities, contractors, and other</td>
<td></td>
</tr>
<tr>
<td>Weatherize teams – decide deadline for site visit requests</td>
<td></td>
</tr>
<tr>
<td>□ Set campaign goals (# of, # of jobs)</td>
<td></td>
</tr>
<tr>
<td>□ Reach out to local groups / potential partners</td>
<td></td>
</tr>
<tr>
<td>□ Identify and engage “Home Energy Champions”</td>
<td></td>
</tr>
<tr>
<td>□ Continue work on team outreach plan</td>
<td></td>
</tr>
<tr>
<td>□ Schedule and begin planning kick-off event</td>
<td></td>
</tr>
</tbody>
</table>

**December**

| □ Finalize outreach plan (for January – March 2018) |  |
| □ Begin talking about the campaign publicly |  |
| □ Start collecting names/addresses of interested residents |  |
| □ Make sure you have what you need to begin outreach on Jan. 1 |  |
| *(Vital Communities will provide posters, handouts, blurbs…)* |  |

**PUBLIC OUTREACH**

<table>
<thead>
<tr>
<th>January</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>□ Get as many people as possible to attend kick-off event</td>
<td></td>
</tr>
<tr>
<td>□ Add as many contacts as possible to the People Tracker</td>
<td></td>
</tr>
<tr>
<td>□ Host Kick-Off Event</td>
<td></td>
</tr>
</tbody>
</table>

**February**

| □ Host follow-up event(s) |  |
| □ Lots of public outreach – add contacts to People Tracker |  |
| □ Begin follow-up with contacts - help them through process: 1)Fill out questionnaire, 2) Request walkthrough, 3) Access resources |  |

**March**

| □ Final push for NEW participants – add them to People Tracker |  |
| □ Follow up with contacts – does everyone know about deadline? |  |
| □ Make a plan for outreach during town meeting (table, announcement) |  |
| □ Deadline to request free walkthrough (likely mid/late March) |  |

**April**

| □ Focus on EXISTING People Tracker contacts – track progress (site visits, proposals, contracts, completed jobs will show up) |  |
| □ Volunteers assigned to a list of participants – emails and calls |  |
| □ Emails to entire People Tracker list with reminders and progress |  |
| □ Celebrate first project(s) completed |  |

**May**

| □ Ensure all participants know about deadline for prize drawing |  |
| □ Continued individual outreach to participants – email & phone |  |
| □ Deadline for Weatherize Prize Drawing (last day of the month) |  |

**June**

| □ Tally and share campaign results |  |
| □ Draw prizes (will be awarded to winners upon project completion) |  |
| □ Team meeting to celebrate and discuss lessons learned |  |
| □ Announce your next steps as a team and promise to contacts updated |  |
| □ Monthly check-in with contractors until all projects are completed |  |

**POST-CAMPAIGN**

<table>
<thead>
<tr>
<th>July/Dec</th>
<th></th>
</tr>
</thead>
</table>

**Ongoing Campaign Tasks**

- □ Regular check-in call with Vital Communities and the partner contractors – every 2-3 weeks
- □ Track sign ups and ongoing progress of participants – direct follow up if it’s been 2+ weeks since last activity
- □ Assign a volunteer to every participant when added to Tracker
- □ EVENTS – Hosted and Piggyback
  - □ One hosted event per month (open houses, forums, drop-ins)
  - □ Two tabling/go-to-them events per month
- □ Email updates to the contact list (about every 2-3 weeks)
- □ Submit regular updates to local newsletters / newspapers
- □ Update progress meter

**Create Outreach Plan**

A roadmap of who, what, when, and how

*January – May 2018*

*Ready to roll by January 1*

**VITAL COMMUNITIES WILL PROVIDE:**

<table>
<thead>
<tr>
<th>Webpage</th>
<th>Handouts</th>
<th>Funding</th>
<th>Ongoing support</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Sign-up forms</td>
<td>• Financing</td>
<td>• Small Outreach Fund</td>
<td>• Volunteer support/training</td>
</tr>
<tr>
<td>• Resources &amp; program info</td>
<td>• FAQs</td>
<td>• Prize Money ($500)</td>
<td>• People Tracker upkeep</td>
</tr>
<tr>
<td>• Team contact info</td>
<td>• Program Overview</td>
<td></td>
<td>• Coordination w/ contractors</td>
</tr>
</tbody>
</table>

**Project Completion:**

Actual home energy projects could begin as early as March or as late as June. Most projects will be completed between April and September.
Strategies and Talking Points for Working with Home Energy Champions

Home Energy Champions are folks who have gone through the Home Performance with ENERGY STAR (HPwES) program, had good results, and are willing to work with you to promote it in your town. You may request from your HPwES partner contractors and Efficiency Vermont the names and contacts of potential Champions, or the Champions may contact you directly.

When you connect with the Champions, explain that there are ways they might be able to help with the Weatherize Campaign. Mark down what they are willing to do – details on each of the following below:

- Work with you to develop a **Success Story** of their project – [see details on back]
- **Identify Personal Contacts** – friends, neighbors, family, coworkers – who might be interested in getting their homes weatherized
- Host an **Open House** at the Champion’s home to see the improvements they have made
- Attend **Public Forums** and talk briefly about their project
- Act as an **Energy Guide**, to mentor others going through the program, or **Committee Volunteer**

**Success Stories**

Success Stories are snapshots of improvements made, savings achieved, costs and projected dollar savings, with a photo of the homeowner and a quote that can be used in your promotion to personalize the program. These will be posted online and you can also make copies to hang around town, display at town forums, etc. *See “How to Create a Success Story” details below.*

**Identify Personal Contacts**

Personal contacts of the Champions are bound to be your best targets for getting more jobs done, since they know and trust the Champions. Working with your Champions to identify and contact individuals they know about the program, and invite them to an open house and forums, is probably your best strategy for getting new jobs.

**Open House**

Invite the Champion’s personal contacts and others in town to come talk with the Champion in their home about the improvements made and benefits of weatherization. Considerations: Is their home located in an easy to get to place in town? Are they familiar with what was done to the home and are they willing to talk with others about it? Are there parts of the home where work was done that might be visible in a walk through? Who was their contractor and might they be willing to attend the open house to talk about the improvements? Might they or your team be able to come up with some snacks (cider, doughnuts, cheese, crackers, etc.) to offer at the open house? Schedule date/time – weekend daytime or weekday evenings might work best. See what works best for them. Ask if they are willing to do individual invitations to their personal contacts. Ask if it is okay for you to publicize the open house on the town listserv, bulletin boards, email lists, etc. Have volunteers at the door to welcome visitors, take names and contacts of attendees, give instructions re removing shoes, if necessary, etc.

**Public Forums**

Ask the Champions if they would be willing to attend and give a brief testimonial about their experience and results at public forums. Ask if they would invite their personal contacts to attend.

**Energy Guide and Committee Volunteer**

Ask the Champions if they might be willing to be a mentor for any of their friends, neighbors, coworkers, etc. who decide to go through the program and if they want to participate on your town Weatherize committee, since they have personal experience. Explain process of following the People Tracker and contacting folks at various intervention points in the process as needed.
How to Create Home Performance with ENERGY STAR (HPwES) Success Stories

1. Identify Home Energy Champions
Work with Efficiency Vermont staff and/or local contractors to identify past HPwES participants in your town who:

- Had good results and are happy with the HPwES program,
- Are willing to work with you to promote this work in your town,
- Are willing to share the results of their home improvement work,
- Are recognized and respected members of your community, and
- Are willing to serve as good spokes people for this program.

2. Get Permission and Information
1. Confirm they are willing to share their story.
2. Get a copy of the Champion’s “HERO” report – the final test out report produced by their HPwES contractor that lists the improvements made, costs, projected savings, etc. – from the Champion. If they do not have a copy, the Champion can request a copy of their HERO report from Perry Vasta (our contact at Efficiency Vermont) – 802-540-7813 or pvasta@veic.org or from their HPwES contractor.
3. Ask them for a brief quote to use in the Success Story. Quotes could address problems before work, improvements/savings after work, aspirations for doing the work. Consider focusing quotes on energy savings, dollar savings and/or increased comfort as may resonate with most homeowners. Length can be one sentence to a brief paragraph or two.
4. Ask them for a photo. In order of preference, the photo should include: the homeowner and home, just the homeowner, or just the home. The Energy Action Network will request TWO photos. One is also fine.

3. Creating the Success Story
Plug the following information from the HERO report into the Success Story:

- Champion’s name and street address
- Improvements Installed
- Air Leakage Reduction
- Projected Heat Energy Savings
- Cost of Job
- Incentives provided by Efficiency Vermont
- Projected Annual Dollar Savings

Use these formulas to create and plug into Success Story:

- Net Cost of Job = [Cost of Job] – [Efficiency Vermont Incentives Received]
- Years to Payback = [Net Cost of Job] / [Projected Annual Dollar Savings]
- Return On Investment (expressed as a %) = 100/[Years to Payback]

4. Getting Approval and Using Success Stories to Inspire Others
Once you have completed your success story, send it to the Champion to review, tell them how you intend to use it, and ask them to let you know if they have any recommended changes or restrictions in how they want you to use it. Here are some ways to consider using the Success Stories:

- Post on the Energy Action Network Dashboard (below) and link to it from the Weatherize website
- Post to listserv, town news letter or email to Weatherize contact list
- Print and hand out at forums, open home visits, tabling events, etc, or post around the community

5. Post Success Story on Energy Action Network (EAN) Dashboard
Where to send the story – EMAIL it or SUBMIT it online

A) Send via EMAIL: Rob Fish rfish@eanvt.org. He will create a story for you on the Dashboard. See Sample Success Story on EAN Dashboard http://www.vtenergydashboard.org/stories/thetford-center-resident-saves-790-per-year-thanks-to-weatherization-efforts

B) – OR - SUBMIT via http://www.vtenergydashboard.org/story-idea. You do not need an account to submit a story although we encourage your volunteers to create one and list their own actions.

After the story is submitted, it will automatically appear among other local stories when participants click links on the Weatherize website.
Sample Success Story

Sharon Harkay, Tucker Hill Road, Thetford Center

I was tired of being too cold in winter and too hot in summer upstairs. I also wanted to save money and help do my share to save the environment.

Measures Installed
- Increased distribution efficiency of oil furnace.
- Air sealed attic, kneewall, wall and basement penetrations.
- Insulated attic and kneewalls

Savings Achieved

<p>| | |</p>
<table>
<thead>
<tr>
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</thead>
<tbody>
<tr>
<td>Air Leakage Reduced by</td>
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<tr>
<td>Projected Heat Energy Savings</td>
<td>26.52%</td>
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<tr>
<td>Cost of Job</td>
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</tr>
<tr>
<td>Incentives from Efficiency VT</td>
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</tr>
<tr>
<td>Net Cost to Homeowner</td>
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</tr>
<tr>
<td>Projected Annual Dollar Savings</td>
<td>$790</td>
</tr>
<tr>
<td>Years to Payback Through Savings</td>
<td>9.15</td>
</tr>
<tr>
<td>Return On Investment</td>
<td>10.92%</td>
</tr>
</tbody>
</table>

Weatherization is a long-lasting investment, bringing energy savings and increased comfort for years to come - long after your initial investment is paid off.

Weatherize Home Energy Success Story Template

Title of Story

Submitted by: [Name of by whomever collected the story or the person the story is about.]

Lead in - "As part of Weatherize Upper Valley, we’ve been working with Home Energy Champions in participating towns to tell their stories. _____ is a resident of ______. Below is their story."

Name, Street Name (not #), Town

Brief quote focusing on “Why” they did the work – problems before work; desire for improved comfort, energy or dollar savings after work, aspirations for less environmental impact or improved planet

Measures Installed

Air sealing where, insulation where, other measures (new heating system, PV, other)

Savings Achieved

<p>| | |</p>
<table>
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<tbody>
<tr>
<td>Air Leakage Reduced by</td>
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<tr>
<td>Projected Heat Energy Savings</td>
<td>#%</td>
</tr>
<tr>
<td>Cost of Job</td>
<td>$$$</td>
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<tr>
<td>Incentives from Efficiency VT</td>
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<tr>
<td>Net Cost to Homeowner</td>
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<tr>
<td>Projected Annual Dollar Savings</td>
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<tr>
<td>Years to Payback Through Savings</td>
<td>#</td>
</tr>
<tr>
<td>Return On Investment</td>
<td>#%</td>
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</tbody>
</table>

1 or 2 Photos – In order of preference, the photo/s should include: the homeowner and home, just the homeowner, or just the home.
# Weatherize Campaign Volunteer Team Roles

<table>
<thead>
<tr>
<th>Role</th>
<th>Responsibilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Team Leader</td>
<td>• Coordinate team meetings and activities (outside Vital Communities check-in calls)</td>
</tr>
<tr>
<td>Primary Contact</td>
<td>• Main contact for Vital Communities, partner contractors, and the general public</td>
</tr>
</tbody>
</table>
| Community Partner Outreach    | • Reach out to community partners (e.g. town clerk, rotary club, library, school, churches) early on to gauge willingness to help during the campaign  
                                   • Manage relations with partners throughout the campaign (send updates for their newsletters, deliver handouts, arrange mini-presentations)   |
| e-Outlet                      | • Regular email updates to the entire People Tracker list of participants  
                                   • Post content to community discussion lists / listservs / Facebook / etc.                                                                                                                                         |
| Visibility                    | • Distribute posters, banners, progress meters, etc.  
                                   • Calendar posts and letters to the editor in local publications  
                                   • Letters or postcards mailed to residents                                                                                                         |
| Events                        | • Coordinate kick-off event  
                                   • Schedule and coordinate other events during “BLITZ” month  
                                   • Open houses  
                                   • Forum or “meet-the-expert” event (e.g. lenders, contractors, past customers, Efficiency Vermont representative, etc.)  
                                   • “Office hours” (e.g. offer to help residents fill out their questionnaire, talk through their concerns for their home and prioritize a scope of work)  
                                   • Consider targeted outreach, door prizes, etc.                                                                                                      |
| Tabling                       | • Arrange for space to table at community events and in public locations  
                                   • Existing community events  
                                   • High-traffic locations (e.g. post office, grocery store)  
                                   • Mini-presentations (e.g. churches, schools, community organization meetings)  
                                   • Keep a calendar of tabling opportunities and coordinate volunteer coverage                                                                                                                                       |
| People Tracker Monitoring     | • Receive basic training from Vital Communities to become familiar with how to navigate, sort, and manage the People Tracker (shared spreadsheet of campaign contacts)  
                                   • Monitor the People Tracker; coordinate calls/emails to participants who are stalled  
                                   • Assign a volunteer to each participant when they are added to the Tracker                                                                                                                                       |
| Direct Follow-Up              | • Willing to call or email specific participants to check in and offer encouragement  
                                   • Guide participants to resources or connect with someone who can give resources                                                                                                                                      |
| Home Energy Champions         | • Recruit happy past customers who want to share their experience  
                                   • Write up a case study of their home  
                                   • Encourage champions to host open house, reach out to friends and family                                                                                                                                         |

**Training Available from Vital Communities:**

- Learn how to use the People Tracker
- Understand Home Performance with ENERGY STAR and Weatherize Upper Valley programs
- Help residents understand financing options, rebate programs, and other assistance available
- Know how to answer questions and/or connect people to the right place with the right resources
Weatherize Upper Valley

Request for Applications from Vermont BPI-Certified Contractors

October 2, 2017

Applications accepted through 5 pm Friday, October 20, 2017.

Participating Communities will be posted online at VitalCommunities.org/Weatherize by October 6.

Questions or clarifications about this RFP should be directed to Sarah Brock, Energy Program Manager at Vital Communities: Sarah@VitalCommunities.org or 802.291.9100 x109.

This RFP is available online at: VitalCommunities.org/Energy/Weatherize, along with downloadable copies in Microsoft Word Document format.

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Overview
Vital Communities requests applications from Vermont BPI-certified contractors eligible to complete home energy projects through Efficiency Vermont’s Home Performance with ENERGY STAR® (HPwES) program to participate in Round Two of Weatherize Upper Valley, launching in January 2018.

Weatherize Upper Valley teams up local volunteers and home performance contractors to make it easier for residents to invest in home energy improvement projects. We aim to double the number of HPwES projects completed each year in participating towns and across the Upper Valley.
Vital Communities will select up to three volunteer teams to participate in Round Two of Weatherize Upper Valley. Teams may include volunteers from a single municipality or several municipalities within a geographically concentrated area. Round Two teams will be posted online after October 9 at VitalCommunities.org/Weatherize.

Each community team will partner with a group of home energy contractors approved by Vital Communities. Participating contractors will comply with the requirements of HPwES along with additional terms of the Weatherize Upper Valley program, as described in this RFP. Any BPI-certified contractor who applies to take part in the Weatherize program, meets the program requirements, and agrees to the terms and expectations of Weatherize Upper Valley will be accepted into the program as a partner contractor. Each partner contractor will choose which volunteer teams to work with and may choose to work with a single team or multiple teams.

Participating communities and contractors, with support from Vital Communities, will develop and implement a five-month community outreach campaign between January and May 2018.

Steps for Residents Participating in Weatherize Upper Valley

Step 1 – Sign up online or at an event
Interested residents can sign up online or at an event to receive information from Vital Communities regarding next steps, links to resources, and contact information for their local volunteer team. Residents who sign up are added to their volunteer team’s contact list and offered friendly support and encouragement throughout the program.

Step 2 – Submit a home energy survey by March to receive a FREE home visit
The home energy survey asks basic questions about each house and its heating fuel use. Residents should fill out the survey as best they can and submit it online or by mail before mid-March in order to receive a FREE home visit and quote from a Weatherize partner contractor of their choosing. The exact deadline for completed surveys will be determined prior to campaign launch with input from volunteers and contractors.

Step 3 – Schedule a free home visit and receive a proposed scope of work and quote
Rather than pay for a comprehensive energy audit up front, Weatherize participants get to meet with a qualified contractor of their choosing for free and learn about their home’s unique opportunities for lower energy bills, increased comfort, and improved home health. Weatherize participants don’t have to pay a dime until they are sure they want to move forward with a home energy project.

Step 4 – Commit to a home energy project by May
After receiving a proposal from a Weatherize contractor, participants can choose to commit to part or all of the proposed scope of work. Participants who sign a contract with a Weatherize partner contractor by May will be entered to win cash toward to cost of their energy improvements. The exact deadline for signed contracts will be determined with input from volunteers and contractors.
Weatherize Upper Valley was designed collaboratively by a diverse working group of home energy contractors, energy committee leaders, and state efficiency program leaders (including Efficiency Vermont), building from the best elements of Solarize Upper Valley, the 2013 Vermont Home Energy Challenge, the Thetford HEAT (Home Energy Action Team), and the pilot round of Weatherize Upper Valley in 2017.

Volunteer teams will have access to a small pool of outreach funding. The fund for Round Two will be available to all Round Two volunteer teams. Vital Communities will be responsible for considering funding requests and distributing funds appropriately. Potential uses for outreach funds include paid advertising, purchase of banners or yard signs, and rental fees or refreshments for Weatherize events.

Residents are free to work with any contractor they choose, within or outside the Weatherize program. However, only residents who sign a contract with a Weatherize partner contractor will be eligible for Weatherize prizes. Within the Weatherize program, residents will have the opportunity to choose among several Weatherize contractors who have committed to partnering with their community.

Weatherize Contractors should consider whether they are willing to extend Weatherize services to small businesses, as long as the building in question is of a residential scope and scale. Volunteer teams will check with their partner contractors before encouraging small businesses to participate.

Partners and Roles
**Vital Communities**

Vital Communities is a nonprofit organization working in the Upper Valley to bring citizens, organizations, and municipalities together to take on issues where an independent voice and regional approach are essential. Vital Communities’ Energy Program works to move the Upper Valley toward Vermont and New Hampshire’s state energy goals by catalyzing local efforts in energy efficiency and renewable energy. Weatherize campaigns in 14 Vermont towns in 2017 resulted in over 100 home performance jobs for seven contractors. Previous Solarize campaigns in 24 towns resulted in 370 solar installation jobs.

Key Vital Communities roles include:

- **Overall program coordination** (e.g. timelines, communication between partners)
- **Campaign website** (host and manage content)
- **Outreach material** (create & share one-pagers, talking points, web content, etc.)
  - Campaign information (FAQs, baselines, goals, process)
  - Home performance 101
  - Case studies and success stories
  - Programs and incentives
  - Financing options
  - List of participating contractors
- **Volunteer training** (meetings and support throughout)
- **Data tracking** (oversee data tracking and sharing between contractors & volunteers)
- **Outreach fund** (manage and distribute funds in support of volunteer team outreach)
- **Prizes** (manage and distribute cash prizes at conclusion of campaign)

**Efficiency Vermont**

Efficiency Vermont manages Vermont’s Home Performance with Energy Star program, the focus of Weatherize Upper Valley. Through Home Performance with Energy Star, Efficiency Vermont provides rebates for home performance projects and support to home performance customers and contractors. Efficiency Vermont was involved in the design of Weatherize Upper Valley and continues to be an important program partner.

**Volunteer Team**

A successful Weatherize campaign is dependent on committed and well-connected volunteers, working collaboratively together on a variety of outreach approaches tailored to each community. The volunteer team has two goals: 1) encourage as many residents as possible to consider a home energy project, and 2) follow up with those residents throughout the program with messages of encouragement and support.

Key volunteer team roles

- **Recruit volunteers and community partners**
- **“Piggyback” outreach** (e.g. table at existing events, contribute to existing newsletters)
- **Proactive outreach** (e.g. host public forums, open houses, drop-in sessions, etc.)
- **Identify & utilize local energy champions** (e.g. collect stories from energy efficient homeowners, encourage targeted outreach to the champion’s friends/neighbors)
- **Be visible** (e.g. banners, yard signs, posters, media coverage)
• **Direct outreach to participants** (encourage new sign-ups to complete a home energy survey and request a consult; call or email specific participants who appear to be stalled)
• **Communication with partners** (participate in regular check in calls with partner contractors and Vital Communities)

**Partner Contractors**
Partner contractors will choose to partner with one or more Weatherize volunteer teams, and we expect each Weatherize team will be partnered with a handful of Weatherize contractors. Weatherize contractors will participate in campaign planning, attend Weatherize events, provide updates on the status of participants, and deliver high quality and timely service to all Weatherize customers.

There will be no binding legal agreement between any municipality/ies and the partner contractors. Vital Communities will work with all parties involved to lay out terms for a good-faith partnership between the Weatherize volunteer teams and contractors. Vital Communities will act as mediator should any miscommunication or conflict arise between program partners.

Summary of partner contractor roles (see Detailed Contractor Roles beginning on Page 7):
• **Recruiting past customers** within relevant towns to share their stories and/or participate in volunteer efforts
• **Data sharing** (share up-to-date status of each participant with the volunteer team(s))
• **Public outreach** (participate in community events and other outreach activities)
• **Regular check-ins** (participate in check-in calls with the volunteer team(s), not more than once every other week)
• **Uphold Weatherize program standards** (timely response, free phone consultations and walkthroughs, proposals and contracts aligned with program templates)

**Timeline**

<table>
<thead>
<tr>
<th>Event</th>
<th>Date/Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>RFP for Contractors: Draft Released</td>
<td>September 1, 2017</td>
</tr>
<tr>
<td>Conference Call for Interested Contractors</td>
<td>Monday, Sept 11, 2017 4:30-5:30 pm</td>
</tr>
<tr>
<td>RFP for Contractors: Final Version Released</td>
<td>October 2, 2017</td>
</tr>
<tr>
<td>Communities selected and posted online at VitalCommunities.org/Weatherize</td>
<td>By October 9, 2017</td>
</tr>
<tr>
<td><strong>Applications due from contractors</strong></td>
<td><strong>Friday, October 20, 2017</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Sent via email by 5 pm</strong></td>
</tr>
<tr>
<td>Contractors selected and notified</td>
<td>November 1, 2017</td>
</tr>
<tr>
<td>Joint campaign planning meeting with all volunteer teams and partner contractors</td>
<td>Mid-November</td>
</tr>
<tr>
<td>Campaign launches with broad public announcement</td>
<td>Week of January 1, 2018</td>
</tr>
<tr>
<td>Event Type</td>
<td>Timeline</td>
</tr>
<tr>
<td>-----------------------------------------------</td>
<td>-------------------------------</td>
</tr>
<tr>
<td>Campaign launch events</td>
<td>In the second two weeks of January 2018</td>
</tr>
<tr>
<td>Volunteers lead public outreach, events, follow up with participants</td>
<td>January – March 2018</td>
</tr>
<tr>
<td>Deadline for participants to request a free home visit and quote</td>
<td>March (exact date to be selected with team input)</td>
</tr>
<tr>
<td>Volunteers lead direct follow up with participants to encourage action</td>
<td>March – May 2018</td>
</tr>
<tr>
<td>Deadline for signed contracts (to be eligible for prizes)</td>
<td>May (exact date to be selected with team input)</td>
</tr>
<tr>
<td>Vital Communities surveys Weatherize Upper Valley participants</td>
<td>June 2018</td>
</tr>
<tr>
<td>Campaign follow-up meetings with volunteer teams and partner contractors to reflect on success and lessons learned</td>
<td>Summer 2018</td>
</tr>
<tr>
<td>Weatherize projects completed</td>
<td>Spring, Summer, Fall 2018</td>
</tr>
</tbody>
</table>

### Detailed Contractor Commitment

**A. Collaboration with Vital Communities and the Volunteer Team (“Program Partners”)**

a. Link to the Weatherize Upper Valley ([VitalCommunities.org/Weatherize](VitalCommunities.org/Weatherize)) where appropriate on the contractor’s website.

b. Provide contact information for Weatherize customers to be posted on Weatherize marketing materials and webpages, and be included in a list of participating contractors (including year founded, BPI since what year, and a 50 word description of your company and services).

c. Collaborate with program partners in developing/implementing an outreach campaign, including one planning meeting with the volunteer team(s) in November 2017.

d. Collaborate with program partners in developing marketing materials, including but not limited to helping to identify supportive past customers and obtain photographs, statements of support, testimonials, or other information for use in Weatherize marketing.

e. Participate in regular check-in calls between January and May 2018 (not more than one every other week; calendar to be agreed upon by volunteers and contractors).

f. Attend and participate in the January 2018 launch event for each community the contractor has chosen to serve.

g. Participate in additional community events throughout the program where appropriate (participation in all events other than the launch events is optional and at the discretion of the contractor).

h. Collaborate with program partners in the event of media attention (e.g. provide quotes, meet with reporters).

i. At the end of the program, meet with Vital Communities and provide feedback through an online survey as well as a debriefing session with volunteer teams. Useful feedback will include insights about customer decision-making processes, motivations to pursue home energy projects, suggested program improvements, and the efficiency and efficacy of different outreach strategies.
B. Marketing Materials, Presentations, and Claims Made Throughout the Program
   a. Refer to the Program as “Weatherize Upper Valley” and/or “Weatherize [Community Name]” in all community outreach materials and marketing efforts, utilizing the Weatherize Upper Valley logo whenever possible.
   b. Direct individuals interested in participating in the Weatherize program to VitalCommunities.org/Weatherize.
   c. Ensure that any media produced or statements made do not claim to represent the opinion or position of Vital Communities or the partner communities.

C. Tracking
   a. Update the Weatherize “Lead Tracker” at least weekly with current contact information and status updates (at minimum: date of audit, proposal, contract, and project completion) for all Weatherize leads. Without timely Lead Tracker updates, Vital Communities and your volunteer team(s) cannot help convert leads into jobs.
   b. Verbally remind all leads that their contact information and project status will be shared with the Weatherize volunteer team and Vital Communities unless they request otherwise.
   c. Include language in each Weatherize proposal reminding customers that their contact information and project status will be shared with the Weatherize volunteer team and Vital Communities unless they request otherwise.
   d. Notify the volunteers and Vital Communities of any leads who, at any point in the program, request their information not be shared.
   e. Provide customer information to Efficiency Vermont within two weeks of the initial home visit via creation of a HERO project.
   f. Submit measure and test-out data to Efficiency Vermont for final HERO review within three weeks of the test-out date for each Weatherize project.
   g. Keep track of how many Weatherize customers finance their projects, and which loan programs are used. Report to Vital Communities the total number of financed projects and the number of projects financed through each loan program.

D. Customer Service
   a. Throughout the program, clearly communicate with all leads about the expected timeline of site visits, proposals, and job completion, and be transparent about any changes in that timeline.
   b. Contractors will be notified by Vital Communities when a resident has completed the home energy survey and requested their information be sent to a Weatherize contractor. Contractors will receive the completed home energy survey along with the resident’s contact information. Contractors will contact leads within two business days of receiving each request. (NOTE: Residents may request home visits from as many contractors as they like, but the program will recommend they start by requesting one home visit.)
   c. When contacting Weatherize leads, contractors will:
      i. Introduce themselves and describe their company.
      ii. Ask any clarifying questions related to the home energy survey.
      iii. Discuss the customer’s desired outcomes and budget limitations.
iv. Offer to provide a home visit and proposal, OR decline to provide a home visit and explain why (e.g. poor fit for company, dangerous site conditions).
d. If invited to conduct a home visit, contractors will attempt to schedule a visit within two weeks of the request.
   i. We expect the home visit will take approximately one hour depending on the amount of time spent answering homeowner questions on site.
   ii. We do not expect Weatherize contractors to complete diagnostics or testing as part of the free home visit.
   iii. Contractors should collect any information they need to produce a project proposal for the customer that meets the requirements listed in Section F.
e. Send a proposal (requirements listed in section F) to the potential customer within one week of the home visit, and communicate with the customer if the proposal will arrive any later than that.

f. Maintain high standards of quality and value when presenting proposals to Weatherize leads.
g. Follow up with leads at least once after sending the proposal to remind them of the program deadline and offer to answer any questions they may have.
h. Make every effort to accommodate questions and requests from potential Weatherize customers.
i. Be familiar with available financing options and provide objective information to customers (Vital Communities will provide relevant handouts).
j. Provide information about all available rebate programs and, if the customer moves forward with a project, submit all paperwork necessary for the customer to receive all available rebates.
k. Aim to complete Weatherize projects within 120 days of receiving a signed contract from the customer, and clearly communicate with customers about when the proposed work is likely to take place.
l. After a contract has been signed, the contractor will arrange to complete the required pre-intervention tests and diagnostics.
   i. Weatherize contractors will be transparent with Weatherize customers about the results of any pre-intervention testing. If the results are inconsistent with the contractor or the customer’s expectations, the contractor will share this information with the customer before proceeding with the work scope. For example, diagnostic testing might reveal a higher or lower air infiltration calculation than expected, resulting in potential for higher or lower savings or rebate estimates.
   ii. We do NOT require the contractor to report pre-intervention diagnostic results to Efficiency Vermont.
   iii. In the unlikely event that testing reveals the project will NOT qualify for the HPwES program, the Weatherize contractor will inform the customer and offer to refund the customer’s deposit.

E. Compliance with Regulations and Codes
   a. Contractors will be familiar with and adhere to all requirements of Efficiency Vermont’s HPwES program.
F. Required Proposal Elements

The “proposal” is the document sent to each Weatherize customer after completion of the initial free home visit. Contractors may use their own proposal format as long as the following elements are included and all information is presented in a clear and legible format.

a. Weatherize Upper Valley logo, website, and program deadline.

b. List of health and safety concerns and any required remediation.

c. List of recommended measures, including an estimated cost for each.

i. The cost of any required diagnostics or testing (per Efficiency Vermont’s HPwES program) should be built into the project cost as appropriate. These costs may be included as a separate line item in the project budget or embedded in the other project costs listed.

ii. If the cost of testing is listed as a separate line item, the description of that measure should explain that this testing is required by the Efficiency Vermont HPwES program, that it occurs at the start and end of the project, and that it qualifies customers for Efficiency Vermont rebates.

iii. Contractors must ensure each customer understands WHY these measures are being recommended. This may be written into the proposal OR articulated verbally during or after the home visit.

iv. Recommended measures outlined in the proposal should take into account the customer’s budget, priorities, and desired project outcomes.

d. Estimated rebate from Efficiency Vermont (we recommend offering a conservative estimate and/or a range; all Weatherize projects MUST be eligible to receive a HPwES rebate from Efficiency Vermont), along with general information about the rebate program (handout will be provided by Efficiency Vermont).

e. Mention of any relevant federal tax credits.

f. Statement describing any deposit required at time of signing.

g. Mention of any relevant warranties.

h. Contractors must also ensure each customer understands their next steps within the Weatherize program. This may be articulated in writing OR conveyed verbally.

i. Information about relevant financing options (handout will be provided by Vital Communities).

j. Information about typical measures involved in HPwES projects (handout will be provided by Efficiency Vermont). Contractors should be prepared to discuss, if asked, how the recommended measures may contribute to overall energy savings and how the customer’s project may compare with a typical HPwES project.

ii. We do NOT expect contractors to produce customer-specific savings estimates as part of the Weatherize proposal. Without completing the necessary tests and producing a HERO report, precise savings estimates would be impossible.

k. If selected, contractors will be required to provide Vital Communities with a sample proposal to ensure that all required elements are present in what Weatherize participants can expect to receive.

G. Required diagnostics and testing
a. We DO expect Weatherize contractors to submit customer information to Efficiency Vermont via creation of a HERO project within two weeks of the initial home visit.
b. We do NOT expect Weatherize contractors to submit a HERO project to Efficiency Vermont for review after each Weatherize home visit.
c. We DO expect Weatherize contractors to submit measure and test-out data for final HERO review within three weeks of the test out data for all Weatherize projects.
d. We do NOT expect Weatherize contractors to report measure and test out data to Vital Communities. Efficiency Vermont will provide that information (with no customer identification information attached) to Vital Communities at the end of the program.

Application Process

Eligible Applicants
Eligible contractors must:
  a. Have current BPI certification.
  b. Be a participating contractor in good standing with the Efficiency Vermont HPwES, abiding by their program requirements.
  c. Have liability insurance as required by Efficiency Vermont.
  d. Provide at least one year of guarantee on workmanship.
  e. Be able and willing to provide services, in accordance with the terms outlined in this RFP, within the communities you elect to partner with.

Conference Call for Interested Contractors
A conference call will be held for interested contractors on Monday, September 11, 4:30-5:30 pm. Call: (712) 775-7031, Mtg ID: 429-770-602. Participation is recommended but not required for interested contractors.

Application Format and Submission
A Weatherize Contractor Application template is available for download as a Word Document at VitalCommunities.org/Weatherize. A preview of this application template is included below.

Completed applications must be received by Vital Communities by 5 pm on Friday, October 20, 2017. Applications should be submitted in PDF format and attached to an email sent to Sarah Brock at Sarah@VitalCommunities.org. Please label your application materials clearly.

Sarah can be contacted directly if you have any questions, concerns, or technical difficulties in submitting your application.

Sarah Brock
Sarah@VitalCommunities.org
802.291.9100 x109
195 North Main Street
White River Junction, VT 05001
Selection Criteria
The selection of Weatherize partner contractors will not be competitive. Any and all contractors who meet the program requirements and agree to the program terms will be invited to participate as a Weatherize Contractor during Round Two of Weatherize Upper Valley. Vital Communities reserves the right to determine, according to their own discretion and considering the case presented by the contractors, whether each bidding contractor meets the program’s requirements.

There is no limit to the number of contractors who may participate in Weatherize Upper Valley.

Contractor Application Template

*PLEASE DOWNLOAD THIS TEMPLATE* at VitalCommunities.org/Weatherize

An editable Microsoft Word Document is available to make the application process easier.

The final submission should be saved and sent to Vital Communities as a PDF.

2018 Weatherize Upper Valley Contractor Application
New Hampshire

COMPANY NAME: ______________________

WITH WHICH COMMUNITY TEAMS ARE YOU APPLYING TO PARTNER?
____________________
____________________
____________________

I. Company Information

<table>
<thead>
<tr>
<th>Company Name:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Website:</td>
</tr>
<tr>
<td>Location of Headquarters:</td>
</tr>
<tr>
<td>Location of Nearest Office:</td>
</tr>
<tr>
<td>Year Established:</td>
</tr>
<tr>
<td>------------------</td>
</tr>
<tr>
<td>BPI-Certified Since:</td>
</tr>
<tr>
<td>Number of BPI-Certified Staff:</td>
</tr>
<tr>
<td><strong>Primary Contact (Name &amp; Title):</strong></td>
</tr>
<tr>
<td><strong>Primary Contact Email:</strong></td>
</tr>
<tr>
<td><strong>Primary Contact Phone:</strong></td>
</tr>
<tr>
<td><strong>Briefly describe your company and outline its history:</strong></td>
</tr>
<tr>
<td><strong>Relevant Insurance Policies:</strong></td>
</tr>
</tbody>
</table>
| **Number of HPwES jobs completed in Vermont**<br>(contact pvasta@veic.org if you need Efficiency Vermont to look this up for you) | 2014:  
2015:  
2016: |
| **Briefly describe** your company's history of HPwES projects within the towns you propose to serve: |  |
| **Services Provided:** |  |
| *(including but not limited to HPwES related services)* |  |
II. Key Roles and Staff

Please list the individuals, teams, and/or subcontractors who will serve key roles during the campaign. If any roles are uncertain at this time, please note and explain.

<table>
<thead>
<tr>
<th>Attend Public Outreach Events:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Participate in Check-In Calls with the Volunteers:</td>
<td></td>
</tr>
<tr>
<td>Contact Leads:</td>
<td></td>
</tr>
<tr>
<td>Perform Home Visits and Write Proposals:</td>
<td></td>
</tr>
<tr>
<td>Carry Out Work Scope:</td>
<td></td>
</tr>
</tbody>
</table>

III. Campaign Proposal

1) Please explain your interest in partnering with this team / these teams on a Weatherize campaign.

Type response here.

2) Describe your geographic proximity to the community/ies you will be partnered with, addressing your team’s ability to provide a consistent presence and high quality customer service throughout the campaign.

Type response here.

3) If the Weatherize volunteer team(s) are successful, we many have dozens of homeowners seeking free professional phone consults, home visits, and proposals. How are you prepared to manage a large volume of leads while delivering quality customer service and participating fully as a program partner?

Type response here.
4) Please outline a contingency plan in the event that the flow of leads is greater than anticipated and you are unable to provide timely and high-quality customer service to all leads.

Type response here.

6) Please list any additional qualifications or services you can provide to Weatherize customers that would complement the HPwES program offering.
   • **Home Energy Score** (are you certified as an assessor?): ________________
   • **Zero Energy Now** (are you a Zero Energy Now contractor?): ________________
   • **Heat Pump Installation**: ______________________
   • **Solar Installation**: ______________________
   • **Other**: ______________________

7) Describe the workmanship warranty you will offer to Weatherize participants.

Type response here.

8) Please describe a payment plan for Weatherize customers, including amount of deposit at signing, final payment, and any interim payments.

Type response here.

**IV. Authorized Signatures**

The undersigned is a duly authorized representative of the company listed below, with the authority to commit the company to full participation in the second round of Weatherize Upper Valley. I certify:

- The company has read and understands the RFP requirements.
- The company is qualified to participate in Efficiency Vermont’s HPwES program and is in good standing with Efficiency Vermont and the Building Performance Institute.
- The company meets all requirements outlined in the RFP.
- If chosen, the company is prepared to fulfill the contractor commitment outlined in the RFP.
- The company understands that selection of a company through this RFP is not an offer and Vital Communities reserves the right to continue negotiations with the selected contractor until the parties reach a mutual agreement. Moreover, Vital Communities reserves the right to reject any or all proposals; waive defects or irregularities in any proposal; enter into discussions with selected contractors; discontinue discussions with any company at any time and for any reason; correct inaccurate awards; change the timing or sequence of activities related to this campaign; modify, suspend, or cancel this campaign; and condition, modify, or otherwise limit awards pursuant to this campaign.
• The company understands that all Weatherize partners, including the company, are expected to be flexible, creative, and collaborative in seeking ways to increase effectiveness and efficiency throughout the campaign.
• The information contained in this proposal, and any related correspondence or documentation, is true, accurate, and complete.

Company Name: ______________________________________________

Authorized by (printed name & title): ______________________________

Signature: ___________________________    Date: _________________