

Home Performance with ENERGY STAR Program Plan Template

Use this Program Plan Template to develop an implementation plan. EPA and DOE are available to help answer questions and provide guidance. Consult our HPwES Sponsor Fact sheet and Sponsor Guide for detailed guidance. Fill out and submit your Program Plan with a signed HPwES Partnership Agreement. Please allow HPwES two weeks to review your plan. Once your plan is approved you will be listed on our website and receive an email with My Energy Star Account (MESA) instructions to access our in-kind supporting material. We reserve the right to decline sponsorship if we feel there is inadequate resources and planning to initiate a HPwES program, and will strategically advise you to what needs to be addressed.

Program Sponsor							
Organization Type	State Government	City or county Government	Public Utility	Non-Profit Organization (chartered by state to implement energy efficiency programs)			
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
Budget							
Source of funding	System Benefit Charge	Grant	Rate Recovery	Other			
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
Provide background information about the source							
Budget Category (in \$)		Pilot Phase*	Year 1	Year 2	Year 3	Year 4	Year 5
Management		\$	\$	\$	\$	\$	\$
Program Development		\$	\$	\$	\$	\$	\$
Contractor Recruitment		\$	\$	\$	\$	\$	\$
Training/Certification		\$	\$	\$	\$	\$	\$
Mentoring		\$	\$	\$	\$	\$	\$
Marketing		\$	\$	\$	\$	\$	\$
Contractor Job Incentives		\$	\$	\$	\$	\$	\$
Homeowner Incentives		\$	\$	\$	\$	\$	\$
Infield Inspections (QA)		\$	\$	\$	\$	\$	\$
Evaluation		\$	\$	\$	\$	\$	\$
Total		\$	\$	\$	\$	\$	\$
What goals do you plan to achieve?							
Contractor Participation Goal (# contractors)							
Job Completion Goal (# of jobs)							
Electric Savings Goal (kWh)							
Peak Electric Savings Goal (kW)							
Natural Gas Savings Goal (therms)							
What metropolitan area or service territory will be served by the program?							
Why did you decide to partner with ENERGY STAR to sponsor a HPwES program?							

What current or past residential energy efficiency programs have been implemented in this market? By whom?

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What is the average electricity and natural gas rate?	Electricity	< 8 cents/kWh	8-10 cents/kWh	>10 cents/kWh
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Natural Gas	< 1.25 \$/therm	1.2 5– 1.75 \$/therm	>1.75 \$/therm
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

PROGRAM DELIVERY

What elements of the program will be implemented by the program sponsor or implementation partners?

Implementing Partners	Organization Name				
Group A					
Group B					
Group C					
Group D					
Program Elements	Sponsor	Implementation Partners			
		Group A	Group B	Group C	Group D
Contractor Participation					
Recruitment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Training	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Certification	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mentoring	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Consumer Financing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Consumer Awareness/Marketing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Quality Assurance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Program Evaluation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

What is your schedule for implementing the program?

Schedule

Activity	Year 1				Year 2				Year 3				Year 4				Year 5			
	Quarter				Quarter				Quarter				Quarter				Quarter			
	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
Identify/recruit contractors																				
Train/equip contractors																				
Launch marketing campaign																				
Implement quality assurance protocols																				
Implement results tracking																				
Explore program expansion																				
Program Evaluation																				

Which contractor delivery model will you emphasize?	Contractor <input type="checkbox"/> Consultant <input type="checkbox"/> Hybrid <input type="checkbox"/> Other <input type="checkbox"/> (explain)
What groups, if any will be targeted / excluded? (e.g. income qualified, utility customers, city residents)	
Please explain how you plan to recruit contractors to participate in the program.	
Attach a copy of the protocols contractors will follow to complete a comprehensive energy audit. This should include a description of any mandatory test-in and test-out procedures (e.g., blower door and combustion safety testing) as well as a summary of test-in and test-out forms, reports or other materials that are required to comply with your program's guidelines.	
Attach a copy of your contractor participation agreement.	
What software or other method will be used to estimate energy savings?	
QUALITY ASSURANCE	
Explain the steps you plan to take to ensure participating contractors deliver comprehensive energy audits and install quality improvements.	
How will contractors report their program activity?	

Will you offer an incentive for contractor reporting and if so, please explain?

How will completed jobs be reviewed (file and in-field)?

How will customer satisfaction be measured?

How will you help contractors represent the Home Performance with ENERGY STAR program accurately (e.g., homes are not qualified ENERGY STAR homes, and contractors are not certified by EPA or DOE)? How will you evaluate their actions?

Attach a process diagram showing how contractors that fail to meet program standards will be identified, monitored, re-trained, sanctioned, or removed from the program.

MARKETING STRATEGY	
What is the name of the program?	
What is the proposed URL for the program web site?	
What marketing strategies will you employ to increase consumer awareness of HPwES?	
Attach examples you plan to use, if developed.	
Attach example of homeowner certificate, if planned.	
What incentives (including financing) will you offer to motivate consumers to participate?	
How will you measure consumer demand for the program (e.g., number of calls, number of website visitors, duration of website visits)?	
Please attach a copy of your plan for managing consumer inquiries about the program (e.g., workflow to handle calls and emails).	