

Cape Light Compact Governing Board
Meeting Minutes
June 13, 2012

The Governing Board of the Cape Light Compact met in regular session on Wednesday, June 13, 2012 in Rooms 11 & 12, Superior Court House, 3195 Main Street, Barnstable, Mass. 02630

Present were:

Robert Schofield, V. Chairman, Bourne
Peter Cocolis, Treasurer, Chatham
Peter Cabana, Member @ Large, Dukes County
Fred Fenlon, Eastham
Barry Worth, Secretary, Harwich
Ronald Zweig, Falmouth
David Anthony, Barnstable
Brad Crowell, Dennis
Tom Mayo, Mashpee
Deane Keuch, Brewster
Kathy Hubby, Wellfleet
Peter Fontecchio, Truro
Richard Toole, Oak Bluffs
Joyce Flynn, Yarmouth (2:23)
Bill Straw, Tisbury

Absent were:

William Doherty, Chairman, Barnstable County
Timothy Carroll, Chilmark
Kenneth Rowell, Orleans
Tim Twombly, W. Tisbury
Sharon Lynn, Provincetown
Everett Horn, Sandwich
Michael Hebert, Aquinnah
Vacant, Edgartown

Counsel/Officials/Consultants Present

Jeff Bernstein, Esq. Legal Counsel	Ashley Amos, BCK Law
Mary Pat Flynn, Chr., County Commissioners	Sheila Lyons, County Commissioner
John Checklick, CVEC Falmouth Rep.	Ed Schmidt, Consultant, MCR

Staff Present

Maggie Downey, Compact Administrator	Meredith Miller, C&I Program Manager
Vicki Marchant, C&I Program Analyst	Nicole Price, C&I Program Planner
Sara Miller, C&I Program Intern	Philip Moffitt, EM&V Analyst
Debbie Fitton, Energy Education Coordinator	Margaret Song, Residential Program Manager
Briana Kane, Sr. Res. Program Coordinator	Joseph Soares, Sr. Power Supply Planner
Karen Loura, Administrative Assistant	Kevin Galligan, Energy Efficiency Program Manager
Lindsay Henderson, Customer Service Coordinator (3:50 pm)	

Public Present

James Rogers, Sandwich	Jani Rapaport, LW Voters CCA
Preston Ribnick, Wellfleet	Patricia Andres & Neil Andres
Mitch Relin	

At 2:09 p.m. V. Chairman Schofield called the meeting to order. Without a representative from Martha's Vineyard, the Board delayed action items on the agenda until Peter Cabana, Dukes County Representative arrived. The following agenda items were taken up out of chronological order.

1. PUBLIC COMMENT

Various statements regarding Compact financial statements, the need for representatives to share them with town officials, and comments concerning the Assembly Special commission were stated or read by the members of the public in attendance.

2. MEETING WITH COUNTY COMMISSIONERS TO DISCUSS SPECIAL BARNSTABLE COUNTY COMMISSION RECOMMENDATIONS RELATIVE TO CAPE LIGHT COMPACT

M. Downey delivered a Power Point Presentation dated June 13, 2012 included by reference hereto and posted at the Cape Light Compact website @ <http://www.capelightcompact.org/resources/board-meeting-presentations/> Commissioner Flynn added that CLC was formed with County Support in 1997 as a result of public need with rising energy costs. The County continues to look to work with CLC for long term energy plans. The County is also supportive of CVEC and her town of Falmouth is particularly supportive. Commissioner Lyons stated that the County's responsibilities relative to the County should be defined. CVEC is a utility and has a right to keep some things confidential (i.e., contract negotiations, etc.) Brad Crowell said the relationship between CLC & CVEC and the County Government needs to be made clear. Comm. Lyons said the Commissioners have just reviewed the Assembly Special Committee Report and have not discussed it as a body. . She said as public servants we need to promote transparency. Chr. Flynn said Barnstable is a unique County and there is a need to do a better job educating the population.

3. CONSIDERATION OF MEETING MINUTES

The Board then considered the May 9, 2012 Meeting Minutes. *R. Zweig moved the Board voted to accept the minutes as presented, seconded by K. Hubby, voted unanimously in favor with T. Mayo, B. Crowell and B. Straw abstaining as they were not present.*

4. FY13 OPERATING BUDGET

The Board then considered the FY13 Operating Budget of \$988,920.00. The Operating Budget is funded by a mil charge on the CLC power supply contract. There was a general discussion about legal expenses. Atty. Bernstein said most of the expense come from participation in regulatory dockets. John Checklick, CVEC Director was present to respond to any budgetary questions relating to the Cape & Vineyard Electric Cooperative and that budget was also reviewed. *On a motion duly made by J. Flynn and seconded by Peter C, the Board voted by roll call to approve the FY13 Proposed Budget with all governing board members who were present voting affirmative, except Mashpee which abstained.*

The Cape Light Compact has been included in Barnstable County's audits since inception. The Board discussed meeting with the County Auditors to consider a retrospective review of CLC funds held by Barnstable County. M. Downey informed the Board the Auditors are available to meet with the Board at the July 11, 2012 Meeting. By agreement, M. Downey will request a presentation in advance of the meeting or provide one at the meeting. Discussion followed. There is no cost to meet with them and review their proposal, but costs will be incurred should the Board move forward with any of the recommendations presented by the Auditors. There was unanimous consensus to pursue a meeting with the Auditors.

5. ENERGY EFFICIENCY COMMERCIAL/INDUSTRIAL FOCUS GROUP REPORT AND PRESENTATION – ED SCHMIDT, MCR PERFORMANCE SOLUTIONS

Ed Schmidt, MCR Performance Solutions, LLC provided a presentation of the Small Commercial Retrofit Program Insights Report and Recommendations focusing at increasing participation. A copy of the report was distributed to the Board and a copy is attached hereto (Attachment A). It was noted that implementation of the

strategic marketing plan recommendation would necessitate an expeditor.

6. ENERGY EFFICIENCY PROGRAM UPDATE

a) L. Henderson distributed examples of the Energy Audit Competition and provided the Board with an update on the program.

b) B. Kane informed the Board that the new lighting catalogues have been received and are available. She also described the Lighting Controls Initiative which program seeks 20 households with dimmers to participate in an assessment. She passed out an informational sheet and energy efficient lighting catalogues.

c) M. Song distributed copies of the Cape Light Facebook Page and a copy of Pinterest.

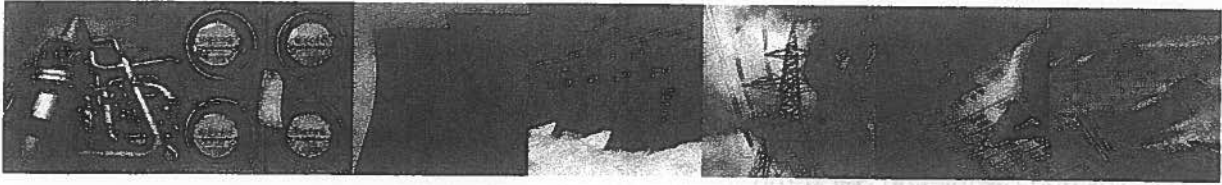
7. REPORT ON 6/6/12 ASSEMBLY OF DELEGATES MEETING

There was general exchange and discussion about the 6/6/12 Assembly of Delegates Meeting attended by members of CLC Board and Staff. It was noted that Cape Light Compact provided briefings and it was acknowledged that it does take a while to understand energy related issues.

8. TREASURER'S REPORT – P. COCOLIS

P. Cocolis distributed Treasurer's Report as of 5/31/12 (Attachment B). He said he would like to provide the CLC Informational Video to his Chairman. T. Mayo offered to help.

At 4:30 p.m. B. Worth moved to adjourn, seconded by J. Flynn and voted unanimously in favor.



Small Commercial Retrofit Program Insights



June 6, 2012

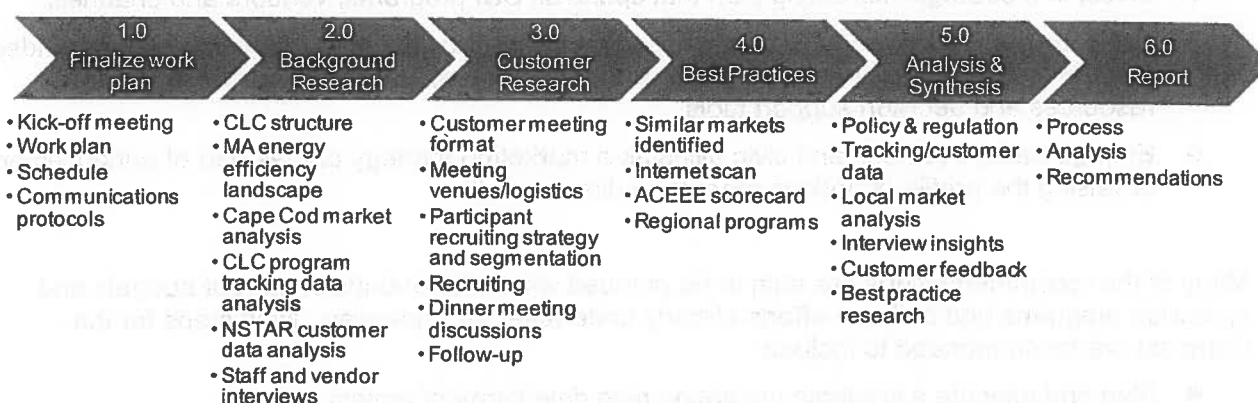
Small Commercial Retrofit Program Insights

Executive Summary

Cape Light Compact engaged MCR Performance Solutions, LLC to conduct research into the question of what the Compact should do to increase engagement of the small C&I sector in its energy efficiency programs. The main feature and source of insight for the project was a series of three customer focus groups.

The conduct of the project was based upon the following work plan, developed through initial discussion and a kick-off meeting held on February 3, 2012.

Figure ES-1: Project Work Plan



Background research included analysis of existing Compact customer data and energy efficiency tracking databases, federal data sources and resources and interviews. The focus group format and discussion were developed by analysis of the various data and through discussions between the MCR project team and Compact staff. MCR used standard focus group techniques and practices to structure a discussion guide. MCR and CLC agreed that the focus groups should be small (6 customers or fewer) to heighten the candor of the discussion. Three groups were carefully planned and participants selected to group similarly sized businesses together and include a mix of efficiency program participants, non-participants and trade allies from the primary industry segments present on Cape Cod. Recruiting of participants was undertaken based upon input from the Compact's Governing Board and analysis of customer usage and program data. The focus groups were conducted March 13-15, 2012; smaller customers were hosted at a Lower/Outer Cape hotel & restaurant in Eastham; mid-sized customers were hosted at a Mid-Cape restaurant in Yarmouthport; and larger customers were hosted at an Upper Cape resort & restaurant in Sandwich.

Focus groups, secondary research and interviews with staff and vendors all point to one fundamental driver of the Compact's energy efficiency programs, administration, marketing and policy/regulatory dealings: Cape Cod and Martha's Vineyard are unique in the dynamics of their C&I customer population. Other primary conclusions and recommendations were developed through analysis of the data and background research as well as best practices research. These conclusions and recommendations include the following:

1. Cape Light Compact and its energy efficiency programs are generally well run and well-received by customers

Small Commercial Retrofit Program Insights

1. Introduction

The Cape Light Compact ("CLC" or "the Compact") engaged MCR Performance Solutions, LLC ("MCR") in January, 2012 to undertake a series of customer focus groups to enhance the Compact's understanding of the small (less than 300 peak kW) commercial and industrial ("C&I") customer population of Cape Cod and Martha's Vineyard. Ultimately, the purpose of the study was to enable better engagement of the C&I customer base and to inform the Compact's development of its next three-year energy efficiency ("EE") plan for calendar years 2013-2015. The primary research question at hand is summarized simply as follows:

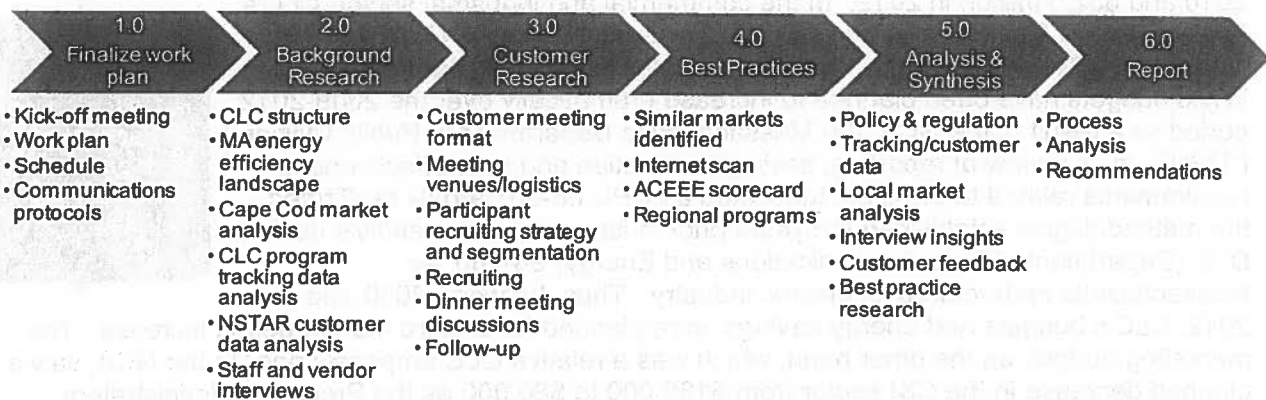
What should CLC do to increase engagement of the small C&I sector given the specifics of the population on Cape Cod and Martha's Vineyard?

Background research, a best practices review and ultimately the focus groups identified the answer to this question. The driving forces were related to the unique cultural and market environment of Cape Cod and Martha's Vineyard and various challenges brought to CLC by the budget, energy savings and administrative ramp-up underway in Massachusetts.

Defining the specific scope allowed for the identification of program design, delivery and marketing as the main areas of interest.

MCR and CLC agreed upon the project plan as depicted in Figure 1.1.

Figure 1.1 Project Work Plan



This report presents the process undertaken and the resulting insights and recommendations. Two caveats to be noted are: 1) focus group participations are, by definition, self-selected and 2) by design, the study is anecdotal in nature as opposed to statistically validated.

The project team included CLC's commercial and industrial program manager as well as MCR staff and is described in Appendix A.

Small Commercial Retrofit Program Insights

In order to develop and secure approval of statewide plans, and then report on them consistently, numerous EEAC working groups have been assembled and meet on a regular basis. The shift to statewide programming and marketing has necessarily been designed to achieve the most impact in the aggregate; but, in so doing, the focus is on markets and media, not necessarily as appropriate or applicable to the state as a whole. The focus groups undertaken with CLC customers establish clarity that they do not value messaging or programming geared to the state as a whole, but rather view themselves as "different" and respond to that which recognizes them as such. From a program administration perspective, the workload associated with participation in the EEAC and its working groups is significant.

2.2 Cape Light Compact Market and Programs

The market within which CLC operates is a unique one in Massachusetts. Data reveals three primary distinctions associated with the commercial and industrial population of Cape Cod and Martha's Vineyard:

1. Smaller-sized entities
2. High seasonality and tourism-dependency
3. Unique mix of business types

An extract of Cape Light Compact's customer database indicates a total of just over 21,000 accounts that had non-zero kWh consumption¹ in 2010, summarized in Table 2.2.

Table 2.2 C&I Account Summary

Customer Type	Total # of Accounts	Avg. kWh per Account	Number of Accounts with Annual kWh of					
			> 1 million	500k-1 million	100k-500k	50k-100k	10k-50k	< 10k
Government	2,116	89,598	28	37	224	190	500	1,137
Industry/Agriculture	129	171,814	5	3	10	3	42	66
Commercial	19,151	33,421	57	95	970	1,135	5,503	11,391
TOTAL	21,396	39,811	90	135	1,204	1,328	6,045	12,594

The data is striking and provides an initial basis for concluding that the CLC C&I market is unique and distinct from that of the remainder of the Commonwealth. Nearly 60% of the accounts utilize less than 10,000 kWh per year, making them equivalent in terms of energy usage to residential accounts. Conversely, only 7% of the accounts utilize greater than 100,000 kWh. Such small annual kWh consumption is indicative of a combination of seasonal and "micro" businesses, such as the art galleries and very small retail establishments common on Cape Cod and Martha's Vineyard. Two critical concerns with C&I customers this small are program cost-effectiveness and the ability to identify projects of enough significance to be of interest to the customer given issues of disruption and "process" (paperwork, screening, scheduling and distraction from the customers' business) associated with participation in EE programs. These data tend to belie

60% of the accounts use 10,000 kWh or less each year

¹ The number of zero readings for 2010 total consumption contained in the extract was large, contributing to subsequent recommendations regarding data management.

Small Commercial Retrofit Program Insights

3. Best Practices

Best practices research was undertaken to identify characteristics or attributes of other efficiency programs known to be successful in engaging the C&I customer base. As a guide to identifying best practices, the National Action Plan for Energy Efficiency ("NAPEE")⁵ was reviewed. The following, among the attributes of best practices as discussed in chapter 6 of NAPEE, reveal themselves as particularly relevant:

1. Market focus
 - a. Assess the market
 - b. Seek stakeholder input
 - c. Coordinate with other program administrators
 - d. Simplify participation
 - e. Invest in education, training and outreach
2. Leverage
 - a. Cooperative activity with market allies
 - b. Utilize state and federal tax and other incentives
 - c. Develop financing options
 - d. Outsource
3. Start with what is known to work
 - a. Adapt program models that are known to work
 - b. Educate and train the trade allies
 - c. Move toward comprehensiveness
 - d. Adjust measure mix to the market and evolution of technology

Consideration of these best practice attributes led to review of several programs throughout the country (listed in Appendix B) based on the following: reputation, proximity to Cape Cod, seasonal/tourism-related market and relative "youth" in program maturity. From NAPEE's high-level discussion of best practice, and given the context CLC operates within, Figure 3.1 on the next page identifies five specific elements of program design and delivery that are particularly noteworthy and worthy of exploration.

⁵ NAPEE (<http://www.epa.gov/cleanenergy/energy-programs/suca/resources.html>) was developed through U.S. EPA coordination of input and assessment by a group of state, advocate and utility representatives and its report was published in 2006. NAPEE was impactful in the implementation of energy-related provisions of the American Recovery and Reinvestment Act ("ARRA") and informed the resulting SEE Action (<http://www1.eere.energy.gov/seeaction/>) effort of the U.S. DOE.

Small Business and Entrepreneurship

The small business sector is a vital part of the economy, providing employment and contributing to the growth of the nation. It is characterized by its flexibility, innovation, and ability to respond quickly to market changes. Small businesses often have a strong sense of community and are more likely to provide personalized services to their customers. They also play a significant role in the local economy, supporting other businesses and creating a multiplier effect. However, they also face unique challenges, such as limited access to capital and a lack of economies of scale. Despite these challenges, small businesses continue to thrive and are essential to the success of the economy.

Small businesses are often the backbone of the economy, providing a wide range of goods and services. They are typically owned and operated by a single individual or a small group of people. This structure allows for greater control and decision-making power for the owner. Small businesses also tend to have a strong focus on customer service and quality. They are often more agile than larger corporations, allowing them to adapt to changing market conditions more quickly. Additionally, small businesses are often more socially responsible, as they are more closely connected to their communities. However, they also face significant challenges, including limited access to financing, a lack of marketing resources, and a high risk of failure. Despite these challenges, small businesses continue to be a vital part of the economy.

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Unique combination of flexibility, rapid and very small business has implications for programs and measures etc.

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Based upon these comments an opportunity for further study is to more thoroughly research customer awareness and perceptions in recognition of the fact that participants in the focus groups were self-selected and therefore likely had an agenda. Additionally, the perception that CLC's programs are dominated by installation of lighting by the direct install vendor and the customer voices stating an interest in other paths to participation suggests that although other paths indeed exist and the direct install vendor is but one delivery mechanism, there are opportunities to drive additional customer traffic to the other delivery paths.⁶

The matter of flexibility of the program design and ways to access funding was also commonly embraced, with provision of a menu of options, including technical support, prescriptive incentives, custom incentives and available financing, along with tools to support customers in undertaking their own analysis and decision-making. A summary statement provided by one participant suggests what the barriers to participation related to accessibility and complexity are in sum:

"It comes down to money, time, aesthetics, complexity (of the work) and disruption of my business."

Communication, awareness and outreach emerged as perhaps the key criticism and point of discussion, generating numerous clear suggestions and statements of specific points of concern in each meeting. In fact, after the first meeting, a mid-course correction was made to add explicit questions and seek specific discussion about how CLC could better "get the word out." Among the participant comments:

"The programs should do better job of referring to other programs to get full spectrum of offerings." (There was a lack of understanding that CLC, Cool Choice, Mass Save, RISE are all related to the Cape Light Compact portfolio.)

"I went to the website and couldn't understand all the materials."

"(You) need to get the word out about the programs."

"The name tends to make people think of lighting, hence Cape 'Light.'"

"Make it simple: we'll help you pay for it, you'll save money."

In general, there was a pervasive sense that customers are "all alone" and that engagement with CLC generally arises from word of mouth or personal connections. There was a striking observation that, try as program managers may, there is still a significant "language barrier" with energy efficiency terminology, concepts and acronyms bogging down communication and making misunderstanding, confusion and disinterest all issues. Again, the fact that the voices raising these issues self-selected to participate and brought with them some bias or agenda, the issue of effective communication before, during and after engagement is a an area for further study for Cape Light Compact.

Caveat: self-selection brings agendas

⁶ The direct install vendor is contracted to be the "gatekeeper" of work on existing buildings, performs most of the C&I portfolio marketing and outreach activity and is responsible for coding participant business types or segments. Use of local building trades is frequently accomplished by the direct install vendor itself opting to sub-contract work to them. In addition, the direct install vendor has opened a small regional office and has hired some local personnel.

Small Commercial Retrofit Program Insights

and its programs are doing well, *additional study be undertaken to determine whether there are additional investments and/or policy/regulatory accommodations* that would be advantageous to CLC's customers and/or consistent with the CLC's statutorily-enabled mission.

5.2 Program Strategy and Design

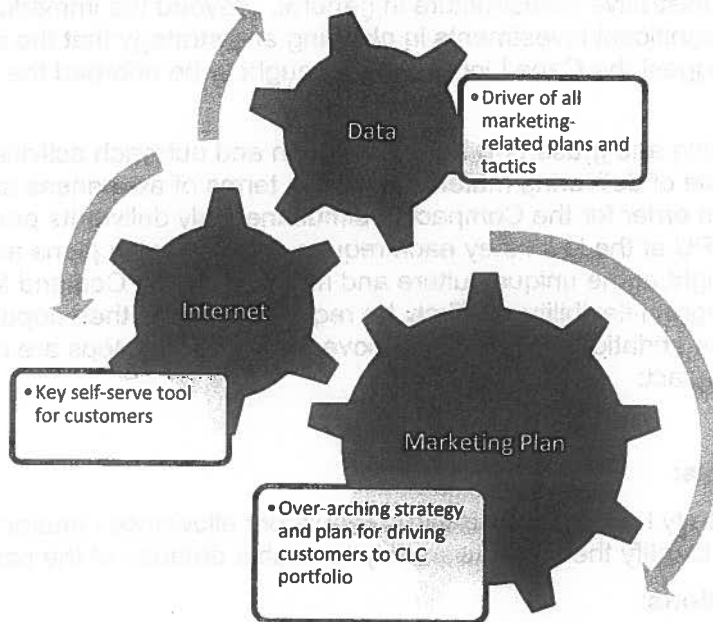
Cape Light Compact offers a comprehensive portfolio of programs that are generally well-received and successful. However, there are opportunities to improve the programs now, either modestly within the constraints of the post-GCA statewide process, or more broadly assuming EEAC and/or DPU accommodation. Improvement opportunities include modest changes that can be undertaken within the current budgets, goals, statewide program designs and statewide marketing plans. Given the research and customer feedback, there are four primary recommendations:

1. Develop segmentation and industry-specific customization of the direct install program, largely as a matter of "packaging" the existing offering. Creation and marketing of separate bundles of measures, analytics and case studies relevant for the hotel/motel, restaurant, small retail and healthcare sectors, for example, would present what is currently available to all customers in a language and applications that will better resonate with specific targeted market segments.
2. "Re-package" the existing custom path, without modification, as the "trade ally" and/or "customer-driven" path. It is unclear whether customers recognize that only the direct install program involves a CLC-contracted vendor and that a custom option is available that allows them to develop their own project (within cost-effectiveness and other program rules) with their own contractors. Clearly defining "custom" in these terms and marketing it would enable better understanding and increase access to the programs for trade allies.
3. Develop a separate "express lighting" offering within the existing direct install program and consider creating a series of targeted, local direct install canvassing events.
4. Conduct a focused, internal review and analysis of existing data and reporting infrastructure in recognition that, although several database and customer-relationship management systems currently exist, it is unclear whether they are consistent with one another or coordinated to maximize reporting efficiency and access to concise yet rich data on customers and program participation.

Review of the best practice program discussion and customer meeting notes provide significant insight into the industry-specific customization and the trade ally/customer-driven packaging. The concept of "express lighting" is to simply take what customers and the direct install vendor agree to be the core of the current direct install program and set it apart for ease of access and to clearly differentiate lighting from the other types of measures available to customers. It is advised to analyze the data infrastructure and reporting needs, ideally in the form of a formal written data situation analysis and a going-forward data management plan. For example, it would be beneficial to be able to quickly develop a profile of a specific customer, including energy usage, business type or segment, participation in any of the CLC programs and history of any inquiries and/or outreach. Similarly the ability of staff to seamlessly and accurately integrate participation data and customer demographic data themselves, rather than via external resources, would also be of value.

Small Commercial Retrofit Program Insights

Figure 5.2 Marketing Planning Relationships



Lastly, and achievable with minimal cost and within existing policy/regulatory constraints, is the matter of direct engagement of key stakeholders in a grassroots campaign and/or broader public relations campaign to tap into the expressed desire of customers to feel more connected or relational with respect to CLC. Examples of such activities might include proactive, positive engagement of local media; regular engagement of civic, trade and business groups; development of the Chambers of Commerce and trade ally communities as advocates for the program, equipped with case studies and program collateral; and promotion of a speaker's bureau. Even as a broader series of plans are developed, Cape Light Compact now has the opportunity to embark upon a defined and intentional effort to *leverage statewide marketing efforts, engage trade allies, chambers of commerce and appropriate trade and civic groups.*

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Many of the recommendations are able to be pursued within the bounds of current budgets and programs and build off efforts already undertaken or underway; next steps for the Compact are recommended to include:

- Initiation of enhanced outreach and engagement of trade, business and civic allies
- Planning and execution of a strategic marketing plan development project
- Prioritization of other conclusions, recommendations and areas suggested for further study
- Establishment of a timeline and plan for addressing conclusions and recommendations agreed upon for action

Small Commercial Retrofit Program Insights

Appendix B - Best Practice Research

Organizations Reviewed

- Detroit Edison
- Indiana Michigan Power
- Wisconsin Focus on Energy
- Energy Trust of Oregon
- Long Island Power Authority
- Efficiency Vermont
- Public Service Company of New Hampshire
- Duquesne Light Company
- United Illuminating

Outputs, Observations, Examples

BEST PRACTICE OBSERVATION

It is important to package a consistent core program or programs by industry type or segment utilizing industry-specific bundles of measures

For example, as shown on the next page, Efficiency Vermont's presentation of industry-segmented opportunities offers a brief description of the segment and then allows users to click on the segment of interest for industry-specific information and opportunities associated with Efficiency Vermont's offerings.

Small Commercial Retrofit Program Insights

Lodging

General Info

Ways to Save

Success Stories

Tips

Overview Financing Publications & Resources 2011 Lodging Survey

Check in to save money and energy.

Whether you run a quaint country bed & breakfast, full-service hotel, motel, or large resort, there's an energy-efficient option that will save your business money. According to ENERGY STAR®, a 10% reduction in energy costs is equivalent to increasing RevPAR (revenue per available room) by \$0.60 for limited service hotels and \$2.00 for full-service hotels. Choosing energy-efficient equipment can also help you create more comfortable guest experiences, increase staff productivity, and demonstrate your commitment to greening your lodging establishment.

Efficiency Vermont provides standard rebates to Vermont businesses for installing a wide range of new, energy-efficient equipment. Custom rebates and technical assistance may also be available for technologies or projects not listed on our rebate forms.

BEST PRACTICE OBSERVATION

Direct install or self-driven and/or program-supported custom/prescriptive approaches, perhaps defined as a hybrid program design and emphasizing choice, comprehensiveness of direct install and flexibility of trade ally-driven custom and prescriptive offerings, would be consistent with best practice programs.

For example, Public Service Company of New Hampshire clearly defines these primary options and drives customers to one of the two paths upfront:

PSNH offers two options for utilizing the rebates through this program:

- ▶ **Option 1: PSNH provides a vendor/contractor**
- ▶ **Option 2: Your preferred contractor performs the installation**

BEST PRACTICE OBSERVATION

Financing program options, ranging from facilitated participation and interest buy-downs to on-bill financing within a menu of choices for participants, would be well-received.

Small Commercial Retrofit Program Insights

BEST PRACTICE OBSERVATION

Online "virtual tours" of efficiency for specific building or industry types may stimulate participation.

Wisconsin Focus in Energy is particularly creative and heavily invested in tools for some sectors, such as hospitality:

Smart Strategies Hotel Virtual Tool

The screenshot shows the interface for "The Smart Strategies Hotel" virtual tool. At the top left, there is a logo for "Focus on energy" and the title "The Smart Strategies Hotel". To the right of the title is a quote: "When it comes to profitability, there's no room for inefficiency." Below this is a large text box that reads: "Please select an area of the Smart Strategies Hotel to explore. Once you are in a specific area, you will have three tabs with learning opportunities to choose from: Situation, Recommendation, and Savings." The central part of the interface features a 3D architectural rendering of a hotel building with several circular callouts highlighting specific areas. On the left side, the words "ENERGY SAVINGS" are written vertically. At the bottom left, there are two small icons: a square and a circle with a dollar sign. At the bottom right, there is a button labeled "How to use this program".