
**Report to
The Vermont Legislature**

**Energy Savings Counseling Report
In Accordance with Act 74. Sec. E.234.3 (b)**

Submitted to: Senate Committee on Natural Resources and Energy
House Committee on Energy and Technology

Submitted by: Office of Economic Opportunity
Department for Children and Families

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Office of Economic Opportunity

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**DEPARTMENT FOR CHILDREN AND FAMILIES
Agency of Human Services**

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THE ENERGY SAVINGS COUNSELING GROUP

The Energy Counseling Savings Group (“Group”) was convened to meet the requirements established in the Appropriations Act for SFY 2021 (Act 74). Section E.234.3 (b) calls on the Office of Economic Opportunity (OEO) in the Department for Children and Families (DCF) to lead the Group to develop a plan for the coordinated and effective deliver of counseling services designed to enroll and deliver energy savings programs to their target service populations. By October 15, 2021, OEO is charged with delivering a plan for coordinating and enhancing energy counseling services to Vermonters with low and moderate-income who could benefit from the State’s energy savings programs, including thermal and transportation energy efficiency programs. No resources were appropriated to support the Group.

The Group’s first convening was charged to the Chairs of the Senate Committee on Natural Resources and Energy and the House Committee on Energy and Technology. In this meeting, the Chairs articulated legislative intent that Energy Savings Counseling specifically seeks to empower Vermonters with low and moderate-income to take action and access resources to address climate change.

Concurrently, DCF was appropriated \$1,500,000 to launch a new 3-year statewide energy and financial coach initiative through the Community Action Agencies. No funds were appropriated for the administration of this program.

The first meeting was convened by the Committee Chairs on June 30, 2021. Thereafter, OEO convened the Group 9 times over the course of the three months prior the report deadline.

The Group’s minutes and work products were posted online:

<https://dcf.vermont.gov/oeo/ESCG>. As named in the legislation, the Group included Community Action Agencies, Efficiency Vermont, and NeighborWorks of Western Vermont. VECAN, and EAN also participated. Group participation was open. Sarah Phillips, the OEO Director, chaired the Group and a list of group participants is in Appendix B.

This report is delivered by the Vermont Department for Children and Families, Office of Economic Opportunity, on behalf of the Energy Savings Counseling Group.

FOUNDATIONS

Ultimately, the Group aimed to identify opportunities to enhance and coordinate energy savings counseling services in Vermont. However, the term “Energy Savings Counseling” is not established outside of legislative language and lacks a standard definition. Thus, as a starting place, the Group set out to ask and answer several key foundational questions:

What is already known about energy savings counseling? Why are we undertaking this Group and report?

What is “Energy Savings Counseling”? How do we define it, and how is it different than marketing?

What is the goal of energy saving counseling and will we know if we have succeeded?

Who currently provides energy savings counseling in Vermont?

What do Vermonters with low and moderate incomes want and need when it comes to energy savings counseling? Who are people currently relying on for information and “counseling”?

Are there any standards or best practices to consider?

The Group developed a working definition of Energy Savings Counseling (see *Definitions & Goals*). Several interviews were conducted with key organizations as part of a scan of energy savings counseling efforts in Vermont, and an informal survey of consumers was conducted to test assumptions and illuminate opportunities. A summary of these findings is also included below.

DEFINITIONS & GOALS

The term “Energy Savings Counselor” is not a normalized or well-worn term of art. Counseling itself refers to the provision of assistance and guidance in resolving personal, social or psychological problems and difficulties, especially by a professional.¹ The American Counseling Association defines counseling as a professional relationship that empowers diverse individuals, families and groups to accomplish mental health, wellness, education and career goals. In contrast to counseling, the coaching field has emerged to define itself as a thought provoking and creative process generally focused on the present and future, rather than developing skills to manage emotions, or provide guidance.²

More recently, Financial Counseling has emerged as a field of professionals with the financial knowledge and counseling skills to provide education and support for families to achieve financial well-being. Financial counselors often help clients address negative financial issues such as debt, credit, budgeting, taxes. Financial coaching is the newest field, differentiated from counseling in that coaches provide advice and encouragement, and do so in a process largely driven by the client. Coaching is not designed to be a therapeutic relationship or to aid clients in a more acute crisis resolution.³

“Coaching” and “counseling” are also perceived differently by low- and moderate-income Vermonters, which in itself is worth consideration.

For this report, the Group used the term “energy savings counseling” identified by the legislature but recognized that an Energy Counselor or Energy Coach might both be terms appropriate to describe this work. In this report, the terms are considered interchangeable; however, further discussion is warranted as the field evolves.

Working Definition of Energy Savings Counseling:

Energy Counselors help people make decisions about energy, and access resources to save energy or use cleaner energy.

Energy Counselors:

- Provide trusted, unbiased information.
- Work to understand someone’s personal financial situation and energy use.
- Help people make a plan that fits their needs, goals and capacity.
- Navigate energy savings programs, because they have a broad understanding of what is available, how programs work, and the financial resources available.
- Help people take the steps needed to achieve their goals.

¹ Oxford Dictionary

² International Coaching Federation

³ Center for Financial Security, University of Wisconsin, Madison

While the locus of energy savings counseling may be energy savings, inherent in the work is a focus on supporting decisions that are both financial and energy related. People might seek out energy counseling or coaching when they have a specific goal or decision in mind – like purchasing a car, reducing environmental impact, or saving money on their fuel bill. In this way, energy counseling maybe considered different from marketing, which seeks to create and distribute information to attract an audience⁴ or to promote or sell a product or service⁵.

The Group also distinguished that Energy Counselors or Coaches were active in helping people to navigate and access resources and provide support through each step of a achieving a goal, not just initial steps.

While Energy Counseling or Energy Coaching may be new ideas, their purpose is fairly clear -- to support individual actions to reduce energy use and/or transition to cleaner energy. In this way, energy counseling helps people to access energy efficiency programs as well as resources to transition to cleaner energy. Ultimately, Energy Savings Counseling seeks to help Vermont achieve its greenhouse gas emission reduction goals by empowering families and individuals to take action.

Results of Energy Counseling:

- People increase their participation in energy saving and emission reduction programs
- People take one or more steps to reduce GHG emissions, reduce energy usage, and reduce costs
- People continue to make decisions that reduce GHG emissions, reduce energy usage, and reduce energy costs (cumulative change over time)

⁴ Content marketing, adapted from American Marketing Association

⁵ Oxford dictionary

CURRENT ENERGY SAVING COUNSELING EFFORTS IN VERMONT

Using its working definition of Energy Counseling, the Group interviewed several groups in Vermont to identify:

- Organizations (and types of organizations) that provide “energy counseling”
- The specific kinds of services or products these organizations offer
- The target audience or market for their energy counseling services (in terms of income, demographics and geography)

Organizations self-identified or identified by others fell into the following categories:

- Efficiency Vermont
- Weatherization Assistance Program
 - BROOC Community Action, Capstone Community Action, Champlain Valley Office of Economic Opportunity, Southeastern Vermont Community Action and Northeast Employment Training Organization
- Heat Squad at NeighborWorks of Western Vermont
- Vermont Gas
- Electric Utilities
 - Specifically identified: Energy Co-op of Vermont, Washington Electric Co-op, Green Mountain Power, Vermont Public Power Supply Authority
- Banks and Credit Unions
 - Specifically VSECU
- Community Action Agencies
 - Specifically MileageSmart, coordinated by Capstone Community Action
- Town Energy Committees
 - Supported by the Vermont Energy & Climate Action Network and Vital Communities

Key Learnings

- Organizations are more likely to use the term “energy coaching” to describe their work. Organizations described energy coaching is something organizations do “every day” but also encompasses a range of specific services such as reviewing contractor recommendations, refining a project scope or providing project management. Energy counseling is sometimes thought of as a “kitchen table” conversation, but some organizations also have a dedicated team of professionals to provide energy consultations and answer questions over the phone. Many organizations described energy coaching as a conversation that happens in response phone or email inquiries. In some ways, energy coaching was seen as akin to giving advice on energy efficiency or an information and referral service which are more limited than the Group’s working definition.

- Efficiency Vermont and the low-income Weatherization Assistance Program both have defined Coach Programs.
 - **Efficiency Vermont Home/Business Energy Consultations**
Efficiency Vermont employs a Residential Energy Consultant and a Business Energy Consultant to provide 1:1 advice on energy related decisions. These 60-minute visits include a top-to-bottom look at a home or businesses energy use. Consultants will evaluate windows, attics, basements, lighting, mechanical systems and appliances to determine whether energy saving opportunities exist. Consultants will ask customers a series of questions, review their energy use/energy bills over time, and create a prioritized list of recommendations, available rebates, financing opportunities, and referrals to additional resources or organizations. For Vermonters who aren't ready for a full consultation, Efficiency Vermont employs a team of Customer Support staff who are available to answer one off questions about programs, technologies, offers or services in the state.
 - **Efficiency Coaching through the Home Weatherization Assistance Program, Administered by the Office of Economic Opportunity**
"Efficiency Coaches" are the first visitor to a Weatherization client's home. Coaches work to build trusting relationships, ask clients questions and explain the steps within the program. Coaches offer energy conservation strategies as well as talk about how the clients can get the most out of the Weatherization work ahead. As part of their work, Coaches perform an electrical efficiency audit to identify areas for savings on the client's electric bill and in their home by screening for and prescribing electrical saving measures. The One Touch Referral Program is used to screen and refer clients to a range of other programs that provide services and support on health, housing and energy. Coaches also identify potential issues that could defer weatherization at the home such as the presence of vermiculite insulation, a leaky roof or other structural issues. The Coach visit is essential and ultimately helps clients to successfully participate in the Home Weatherization Assistance Program by making the process more cohesive and maximizing the health, energy and financial benefits for clients.
- Often organizations receive questions from their customers which result in a referral to Efficiency Vermont, NeighborWorks Heat Squad or the Weatherization Program.
- Town energy committees have long provided a critical grassroots, neighbor-to-neighbor conversation. While some town energy committee members may rise to the level of an energy counselor or coach, generally, these champions are seen as energy-educated, trusted neighbors who provide outreach, information and referrals to existing energy

savings programs. In this way, they are less likely to support specific decision-making, look at household finances, or to help Vermonters to navigate through multiple steps.

- Energy counseling-like services seem to have grown out of specific sectors (e.g., utility, home heating, finance, transportation), rather than a whole budget or whole household energy approach.
- For some, energy savings refers more to cost savings, while in other cases it is more focused on energy saving (kwh, btu) and reductions in greenhouse gas emissions. This orientation depends on who is providing the service.
- In almost all cases, the conversation about energy savings is initiative by the consumer vs. the agency.
- Energy coaching services are often tied to a specific product or program.
- Current energy coaching services tend to be geared towards people who can afford to make changes. In reality, many Vermonters with low incomes experience a significant energy burden, and conversations about energy may be focused on energy security and crisis.

VOICES OF VERMONTERS WITH LOW & MODERATE INCOMES

Energy Savings Counseling is intended to solve one or more problems – for example, that energy savings options and programs may be difficult to navigate or understand or that Vermonters with low and moderate incomes lack the capacity (e.g., time, know-how, finances) to make changes in their energy usage. For these reasons, it is important to hear directly from Vermonters intended to benefit from Energy Savings Counseling services. Identifying opportunities to enhance services and better coordinate, will be best informed by a range of “consumer” voices, with particular attention to equity. Vermont’s diverse communities will likely have different experiences with energy savings programs, different energy needs, approaches to decision-making, etc. Better energy counseling services which achieve the desired results will need to be informed by rural Vermonters, Vermonters with limited English, Vermonters with very low incomes, Black, Indigenous and Vermonters of Color, and other traditionally marginalized groups.

With additional time and resources, the Group would seek to engage a more diverse group of Vermonters on the Energy Saving Counseling Group, potentially in focus groups, interviews, and even a larger, statistically significant survey.

Given time constraints, the Group undertook a short qualitative survey of Vermonters to start to understand the opportunities and impact that Energy Counseling. Capstone Community Action provided a \$100 VISA gift card in a raffle to encourage survey participation.

The survey asked participants to describe steps they have taken to save energy or use cleaner energy at home and when they travel. Participants were invited to describe why and how they made their decision as well as how successful they were with taking action. Participants shared what helped them to be successful and what has prevented them from taking steps in the past. The survey then asked specific questions about working with a coach or counselor – including whether someone would want to work with someone, what they would want to know before meeting with someone, where and how often they would want to meet with someone.

The full survey is included in Appendix C.

The Group received 188 responses to the survey. It’s worth noting, that the survey was called an “Energy Decisions Survey” and the Group felt clearly that respondents were likely biased towards having an interest in reducing energy usage or using cleaner energy.

Survey Themes

- Many people who want to save or use cleaner energy take a do-it-yourself approach, low/no-cost options, and/or take lots of small steps.
- The range of actions that people take to “save energy or use cleaner energy” is broad. It included traditional options like heating systems, solar panels, efficient appliances and light bulbs, home weatherization, lower mileage/electric vehicles, etc. But, it also

included carpooling and bicycling, drying clothes outdoors, re-use of water, living downtown, turning down the thermostat, etc.

- Some people feel discouraged about the savings that are achieved, but many also recognize non-cost saving benefits like a warmer home, being healthier, reduce GHG emissions, etc.
- Renters repeatedly identified the challenge of energy decisions being in the hands of their landlords which may not have the same desire or incentive to reduce energy usage or use cleaner energy.
- The cost of taking actions and lack of financial resources were a top barrier, and when funding was available, it was the top reason cited for success.
- Responses related to energy usage with travel and transportation were more associated with concerns related climate action.
- Although not statistical by any measure, about half of the group was interested in energy coaching or counseling if offered at no cost. Again, respondents may be more motivated towards saving energy than the average Vermonter.
- People wanted to make sure it was “worth their time”; “Time is precious. Will they be helpful?” and that the coach/counselor would “know more than me”.
- There were several comments related to the qualifications of the individual (“what their experience is”, “has expertise”, “what training and background”), and also the need for a coach/counselor to be unbiased (“who they work for, what is their motivation”, “only pushing certain products or methods”, etc).
- People conduct a lot of research on their own. Common responses included researching online, calling resources like Efficiency Vermont, Heat Squad, Weatherization Program, and talking with family and friends.

FUTURE OPPORTUNITIES TO ENHANCE AND COORDINATE ENERGY COUNSELING SERVICES

The Group developed the following list of opportunities. Each requires further exploration prior to implementation.

- Energy Counseling services could be targeted to reach landlords, condo associations, large apartment buildings, etc. An approach that works with both landlords and tenants could be a way to address the “split incentive”.
- Energy counseling and coaching resources could be better inventoried and made known to town energy committees/VECAN which acts as an important information and referral resource.
- Sector-specific energy coaching may be an effective strategy, and there could be opportunities to better integrate more holistic energy screening and referrals.
- Where energy counseling or coaching is tied to a specific product or program which derives a financial benefit, there are important questions regarding consumer protection standards that need consideration.
- Energy coach and counseling staff would benefit from ongoing information and education about new and existing resources. This information exchange could support better referrals.
- To the extent that many low-income Vermonters face an energy burden, it may be important for energy counselors to have knowledge about programs that address energy insecurity and crisis (e.g., LIHEAP, emergency heating system repairs, etc.).
- There are other organizations working with low-income Vermonters who may benefit from energy counseling – such as human service organizations, homeownership centers, schools, realtors, home inspectors, etc. There are likely opportunities for strong referral partnerships.
- There are a number of tools that exist to help people with energy- and financial-related decisions. There may be opportunities to build on these tools to integrate decision-making - budget, capacity, savings, goals, values, etc. as they relate to both energy and finances.
- It is important to explore training opportunities for energy counselors and coaches. It may also be valuable to create training and/or adopt standards for energy counseling and coaching practice.
- There is a need to better understand how an energy counselor or coach will work in conjunction with a home energy visit, an energy auditor, and energy related professionals.

- Implement and evaluate the new Energy & Financial Coach initiative led by Vermont's Community Action Agencies.

Members of the Energy Savings Counseling Workgroup or other organizations may choose to explore and advance any of the above-mentioned opportunities to enhance and coordinate energy counseling services. A formalized, ongoing Workgroup would require additional resources to take on this work.

Appendix A: Legislation

Act 74. Sec. E.234.3 (b) Energy Savings Counseling report.

(1) On or before June 30, 2021, the Chairs of the Senate Committee on Natural Resources and Energy and the House Committee on Energy and Technology, or their designees shall meet with the Office of Economic Opportunity, the directors of the community action agencies, Efficiency Vermont, NeighborWorks of Western Vermont, and other parties currently providing outreach and counseling services to Vermonters with low and moderate income for the State's energy savings programs, including thermal and transportation energy efficiency programs.

(2) Thereafter, the Office of Economic Opportunity shall lead the Energy Savings Counseling Group that shall develop a plan for the coordinated and effective delivery of counseling services designed to enroll and deliver energy savings programs to their target service populations.

(3) On or before October 15, 2021, the Office of Economic Opportunity shall report to the Senate Committee on Natural Resources and Energy and the House Committee on Energy and Technology a plan for coordinating and enhancing their counseling services to Vermonters with low and moderate- income who could benefit from the State's energy savings programs, including thermal and transportation energy efficiency programs.

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Appendix B: Workgroup Meetings & Members

BROC Community Action

Capstone Community Action

Champlain Valley Office of Economic Opportunity

Efficiency Vermont

Energy Action Network

NeighborWorks of Western Vermont

Northeast Kingdom Community Action

Office of Economic Opportunity, Chair

VECAN

Appendix C: Survey Questions

We want to understand your experiences saving energy or using cleaner energy at home and for transportation. We want to understand what has helped you to be successful making changes in the past and what might help you in the future.

We are a group of organizations that work to deliver services and funding to help Vermonters with low and moderate incomes save energy and transition to cleaner energy options for heating, cooling, electricity and transportation. Our group is led by the State of Vermont Office of Economic Opportunity. You can read more about our group here: <https://dcf.vermont.gov/oeo/ESCG>

This survey takes about 6 minutes to complete. If you choose, your responses are anonymous. You can choose to answer some or all questions.

At the end, you will have an option to be sent to a different form to enter into a raffle for a \$100 VISA card or have some contact you with more information.

This survey will close on August 27, 2021.

Thank you!

At Home

1. How important to you is saving energy or using cleaner energy at home?

not so important important extremely important

2. What steps have you taken to save energy or use cleaner energy at home?

3. Why was saving energy or using cleaner energy at home important to you? (Check all that apply)

- To save money
- To reduce the effects of climate change
- To have a healthier and safer home
- Other (please specify)

- None of the above

4. How did you decide what steps to take?

5. How successful were you in saving energy or using cleaner energy at home?

- Very Successful
- Somewhat Successful
- Not Very Successful

Please say more:

Transportation

6. How important to you is saving energy or using cleaner energy in your transportation?

not so important important extremely important

7. What steps have you taken to reduce energy or use cleaner energy in your transportation?

8. Why was saving energy or using cleaner energy when traveling important to you? (Check all that apply)

- To save money
- To reduce the effects of climate change
- Other (please specify)

9. How did you decide what steps to take?

10. If you were successful in saving energy or using cleaner energy at home or when traveling, what helped you to succeed?

11. What might have helped you to be more successful?

12. What steps are you thinking about taking in the future to save energy or use cleaner energy at home or when you travel?

13. What has prevented you from taking steps to save energy or use cleaner energy at home or when you travel?

14. What would help to take steps to save energy or use cleaner energy at home or when you travel? (Check all that apply)

- Someone who can help me apply for and access energy resources and programs
- Someone who could coordinate or work with my landlord
- Someone to help me make financial decisions related to energy
- Someone who can tell me about energy resources and programs
- Other (please specify)

None of the above

15. If there was an "Energy Coach" or an "Energy Counselor" to help you access resources and make financial decisions about energy, would you want to work with someone? Assume that it does not cost you anything to work with someone.

- Yes
- No
- Maybe

Comments

16. What would be important to know about an Energy Coach or Counselor before you met with them?

17. How would you prefer to meet with an Energy Coach or Counselor? Select all that apply.

- In person at their office
- Over the phone
- In a public place, like the library or a community center
- Over video conferencing, like Zoom
- At my home
- Other (please specify)

18. How often do you think you would meet with an Energy Coach or Counselor?

- Once
- 2-3 times
- Whenever questions come up
- Other (please specify)

Demographics

The following questions will help us to understand more about who is answering the survey. These questions are optional.

19. What is your current living situation?

- Rent
- Own
- Other
- Prefer not to answer

20. How many people are in your household, including you?

21. Please estimate your annual household income. (optional)

- | | |
|---|---|
| <input type="radio"/> Under \$15,000 | <input type="radio"/> Between \$75,000 and \$99,999 |
| <input type="radio"/> Between \$15,000 and \$29,999 | <input type="radio"/> Between \$100,000 and \$150,000 |
| <input type="radio"/> Between \$30,000 and \$49,999 | <input type="radio"/> Over \$150,000 |
| <input type="radio"/> Between \$50,000 and \$74,999 | <input type="radio"/> Prefer not to answer |

Raffle for Energy Decisions Survey

Thank you for taking our survey!

Please [CLICK HERE](#) if you would like to enter a raffle for a \$100 VISA Gift Card from [Capstone Community Action](#).

You can also let us know if you would like someone to contact you about energy savings opportunities and resources for you.

[CLICK HERE to ENTER THE RAFFLE AND PROVIDE YOUR CONTACT INFORMATION](#)