

3. Guidance on Marketing, Education, and Outreach Campaigns Targeting Energy Efficiency Improvements in Rental Housing

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Introduction

Local governments often face challenges when communicating with property owners, building staff, and renters—particularly when the topic is energy efficiency. This may be because these stakeholders do not understand the full range of available energy efficiency resources, are unclear or unconvinced of the energy and nonenergy benefits of pursuing energy efficiency projects, or find the process of navigating and accessing energy efficiency resources difficult and burdensome. To address and overcome these barriers, local governments can use specific strategies to better engage with property owners, property management staff, and renters of rental housing properties. Local governments can also partner with community-based organizations (CBOs) and trusted community messengers to conduct marketing, education, and outreach. This toolkit contains guidance on how to reach these stakeholders and outlines strategies that have been successfully used to educate them on energy efficiency, as well as to reduce barriers to participation in energy efficiency programs offered by the city, a utility, or other organizations.

Overview of Marketing, Education, and Outreach Campaign Strategies

When designing marketing, education, and outreach campaigns for energy efficiency programs, local governments can target three key audiences: property owners, property management staff (e.g., property managers, maintenance staff, and leasing agents), and renters. Marketing and education strategies often differ depending on the target audience. Table 1 summarizes these strategies by target audience. The strategies are loosely based on the easy, attractive, social, and timely (EAST) framework, which suggests policies that can result in behavior change (Service et al. 2014).

Table 1. Summary of strategies by target audience

| Target audience | Best practice | Description |
|-----------------|---------------------------|---|
| Property owners | Engage local associations | Working with local housing and property owner associations can provide local government staff with direct access to property owners |

| Target audience | Best practice | Description |
|---------------------------|--|---|
| | Simplify programs and marketing | Creating one-stop shops can reduce barriers to program participation |
| | Target energy efficiency upgrades during other building improvements | Mapping energy efficiency upgrades onto other building improvements can result in increased actions from property owners |
| | Present case studies of program successes | Showcasing success stories can convince property owners to participate in the program |
| Property management staff | Simplify programs and marketing | Creating one-stop shops can reduce barriers to program participation |
| | Host regularly scheduled check-in calls | Staying up to date with current staff challenges can help the local government ensure that program benefits are being realized |
| | Highlight direct install programs | Encouraging direct install programs can be successful since staff may not need property owner approval |
| Renters | Identify and engage interested property owners and managers | Interested property owners can connect local governments directly with their renters |
| | Work with CBOs | Working with CBOs can help the local government build trust among renters |
| | Provide communication materials to owners and managers | Providing communication materials reduces the burden on owners and managers to determine how to best discuss energy efficiency with renters |
| | Highlight nonenergy benefits | Renters view some nonenergy benefits (e.g., improved air quality) as important |

Guidance on Engaging Property Owners

To achieve their goals in the rental housing sector, local governments must successfully engage with property owners. This is because property owners hold almost all decision-

making power on building improvements, including energy efficiency upgrades that involve capital improvements. However, property owners can be difficult to track down and contact. Local governments can begin outreach to property owners by leveraging existing relationships with the state housing finance agency, affordable housing advocacy organizations, local real estate trade and investor associations, and other similar groups (Ross, Jarrett, and York 2016; Garboden 2021). Some utilities have successfully partnered with these associations to spread awareness of their energy efficiency offerings and connect directly with property owners (ACEEE 2014).

Property owners may worry that participating in an energy efficiency program will entail a big commitment of time and energy. Local governments should therefore emphasize the simplicity of program participation (ACEEE 2014; Luxton et al. 2020) and incorporate simplicity into the design of energy efficiency programs and their related customer-facing services. In other words, program participation must feel simple to participants, even if programs are complex behind the scenes. Models such as [one-stop shops](#) that use a single point of contact to connect building owners with all the energy efficiency services they need can maximize program participation (ACEEE 2014; EEFA n.d.). Streamlining project implementation by providing simple, standard upgrade packages, as well as conducting the work in as few days as possible, can also help drive participation; [Fort Collins](#) used this approach and converted 44% of its energy assessments into comprehensive upgrades and reduced the time required to complete a project from 119 to 76 days (Kassiser 2018).

In addition to simplicity, maximizing program flexibility—in both financing and compliance pathways—can also drive property owner participation. For example, by not mandating a list of qualified measures (i.e., upgrades that must take place), California has increased participation in its Low-Income Weatherization Program for Multifamily Properties program (Samarripas and York 2019). Additionally, local governments can market energy efficiency programs to property owners when other home improvements are being planned, allowing them to map energy efficiency and clean energy upgrades onto a range of projects (Martín 2022). For example, roofing replacements can incorporate solar photovoltaic systems, garage remodeling can integrate electric vehicle charging, and kitchen remodeling can include efficient appliances (Martín 2022).

Lastly, when communicating the benefits of program participation, local governments can provide property owners with case studies of buildings that have participated in programs and highlight program successes (ACEEE 2014). Case studies can be a key marketing tool because they give owners important information about the realized energy and nonenergy benefits of the energy efficiency services being promoted. Providing information on social norms—that is, a building's energy use relative to similar buildings—and approving of behavior that reinforces social norms can result in energy conservation behavior (Bonan et al. 2020).

Guidance on Engaging Property Management Staff

Because they supervise the building's day-to-day operations, property management staff are another critical group to target for marketing and educational campaigns. Property management staff members are likely to be directly involved in energy efficiency upgrades and improvements in their buildings. Like property owners, building managers and property management staff have limited time, so simplicity in outreach, participant experience, and program design is likely to result in greater success compared to more complex programs (Luxton et al. 2020; ACEEE 2014).

Hayes et al. (2018) note that while property management staff are often concerned about energy, other priorities often overshadow or take precedence over energy management. They therefore provide a list of steps for engaging property management staff. The list is based on strategic energy management and provides staff members a clear pathway toward energy reductions:

- Host a kickoff meeting to inform and educate staff on the particulars of an energy efficiency program
- Assess each property to learn about existing buildings systems and potential areas of improvement
- Host operations and maintenance workshops with curriculum tailored to property management staff
- Develop and provide an operations and maintenance toolkit that includes information on how to assess properties, best practices for building problems, and information on how to inspect energy systems as part of routine maintenance
- Provide energy benchmarking data and scorecards to inform staff on building energy performance relative to other buildings
- Host a regularly scheduled check-in call with staff to discuss progress, concerns, and issues (Hayes et al. 2018)

Building managers and staff often have the authority to make building improvements that do not require the property owner's approval. As a result, campaigns to market and educate them on direct install programs can be particularly successful (ACEEE 2014).

Guidance on Engaging Renters

Engagement is not simply marketing to renters; it should begin with listening to renters, receiving their input, and building a trusting relationship that allows for co-creation.¹ The most important engagement a local government can undertake is authentic, long-term

¹ For more information on community engagement, see ACEEE's [A New Lease on Energy: Guidance for Improving Rental Housing Efficiency at the Local Level](#).

relationship-building with renters and CBOs prior to program development to ensure that the programs are responsive to renter needs, priorities, and concerns. Local governments can reach renters by partnering with renter associations or CBOs that work with renters. They can also consider digital approaches to community engagement.² During the COVID-19 pandemic, [Denver](#) hired community liaisons to promote participation in online community engagement sessions for the city's climate action planning. The city also promoted access to Wi-Fi and computers and offered direct phone support.

Depending on the energy efficiency program's design, renter engagement can have various goals, including educating renters on programs to reduce energy costs (e.g., demand reduction, behavior change); advertising or enrolling renters in energy efficiency programs that do not require property owners' approval (e.g., LED lighting replacements, plug-load solutions, etc.); generating support among renters for programs that encourage property owners to take energy efficiency action; or building a relationship to co-create and co-design programs. In some cases, renter leadership in energy efficiency projects can prevent temporary and permanent displacement during retrofits. This was demonstrated in the [Castle Square](#) deep energy retrofit project (Isaacs 2012; BSC 2019).

An initial step to engaging renters is gaining access to their buildings. Local governments can partner with building owners and managers who are interested in energy efficiency programs and give them educational materials to share with their tenants (Luxton et al. 2020).³ Luxton et al. identify several ways that local governments can support buildings owners and managers as they engage renters. These include providing a timeline of events, ideas for workshops, trainings and education for ambassador programs, and messaging templates and other communication materials (Luxton et al. 2020). Local governments can also require property owners to engage renters as a precondition to offering financial or technical project assistance.

Local governments can send communication materials at regular intervals. Such materials can include information on the building's energy efficiency programs, top-10 lists and tips for saving energy, and the benefits of reducing energy use (Luxton et al. 2020). Using graphics in communication materials can be highly effective as they help overcome language barriers (Luxton et al. 2020). Local governments may have more success engaging renters when partnering with trusted CBOs to develop communication materials that are

² For information on digital approaches to community engagement, see CitizenLab's [The Beginner's Guide to Digital Community Engagement](#).

³ Luxton et al. (2020) provide examples of engagement materials that local governments can employ in their [Engaging Multifamily Residents in Energy Conservation](#) toolkit.

fully accessible to community residents, including disabled and non-English speaking households (Bergstrom et al. 2020).

Communication materials can also stress energy efficiency's nonenergy benefits, including improved health, safety, and comfort. Studies have shown that indoor air quality tops the list of concerns about home performance and health impacts (La Jeunesse 2019; Will 2022). Further, residents are more likely to participate in energy efficiency programs when they have information about the various types of value that can result from energy efficiency improvements (Shelton Group 2016). Renters also have higher rates of engagement with energy efficiency messaging when the value proposition features improvements in comfort, as opposed to focusing on saving money or conserving energy (Marshall et al. 2020).

Lastly, local governments can consider more interactive forms of engagement, such as energy reduction competitions. These competitions can result in high energy savings (Sussman and Chikumbo 2016).

Case Study: Dane County Efficiency Navigator Program

QUICK FACTS

STAFFING: 1.5–2 FULL-TIME EQUIVALENT EMPLOYEES | PROGRAM DELIVERY COSTS: \$2,500–4,000 PER UNIT

PROGRAM BACKGROUND AND DESCRIPTION

The Dane County Efficiency Navigator program is a partnership between Elevate and Sustain Dane, a nonprofit serving Dane County, Wisconsin. The Efficiency Navigator program aims to set up a one-stop shop for property owners of small- to medium-sized rental properties to access energy efficiency, water efficiency, and solar energy upgrades and improvements. This helps reduce barriers to clean energy projects in these buildings. The program primarily serves buildings with rents at or below 80% of the area median income. It reduces barriers for property owners by providing free energy assessments and a step-by-step, three-year implementation plan for any suggested projects. The program also provides technical assistance to help those property owners navigate efficiency programs, incentives, and contractors. Program beneficiaries sign a community benefits agreement ensuring that rents are maintained at an affordable level for at least three years.

STAKEHOLDERS AND ENGAGEMENT

Elevate created an advisory group of key stakeholders to guide the program's development. Along with Elevate, that advisory group included the municipal city and county governments, Sustain Dane, Madison Gas & Electric, Focus on Energy, the water utility, the sewage district, and the Urban League. The group met for almost a year; during meetings,

Elevate would present the group with program design questions and listen to feedback from members.

When designing the program, Elevate and Sustain Dane took a neighborhood-based approach to engagement and held community meetings to solicit feedback. This neighborhood approach resulted in Madison Common Council members offering their help and support of the program.

Stakeholder outreach also occurs during program implementation, when the program provides renters with information on projects taking place in their building.

SUCSESSES

In 2020 alone, the program conducted energy assessments in 95 units, achieved 10–20% savings in in-unit energy and water use, and identified \$155,500 in incentives.

CHALLENGES AND LESSONS LEARNED

One key challenge is that building relationships with contractors takes time, and not all contractors will want to fully engage. It is important to know when to pivot to different contractors when a relationship presents difficulties. Likewise, building relationships with property owners can be challenging because they are often busy and have other priorities, so keeping their attention is key.

In terms of lessons learned, it is important to convene a comprehensive and interested stakeholder group that can guide the work at the beginning of the program design process. Also, when a program covers multiple jurisdictions, stakeholders may want to use different approaches in different jurisdictions.

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