

# Memorandum

To: Washington State Department of Commerce  
From: Cadeo/E4E  
Date: December 14, 2023  
Re: Recommendations for design of an energy navigator based on 2023 preliminary research

## Executive Summary

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The research team recommends the new statewide energy navigator focus on three objectives in Year 1, in order to achieve stakeholders' priorities to work quickly, facilitate greater access to existing resources, and utilize established community organizations:

1. **Coordinate efficiency organizations throughout the state** to initiate a venue for regular communication and knowledge-sharing and, in Year 1, systematically identify availability of services and financial resources to populate a new information hub and identify geographic (and other) gaps in service/resource availability.
2. **Create a public-facing information hub**, including a website, information portal and phone line to provide information on available resources to households, trades, and community-based organizations.
3. **Direct new funding** to community-based organizations with a demonstrated capacity to deliver services to underserved areas through a transparent, equitable procurement process. Community based organizations are especially valuable as trusted messengers to underserved populations.

To encourage engagement from other clean energy stakeholders, Washington should consider an initial funding horizon of no fewer than five years. Beyond Year 1, we recommend the navigator be enabled to expand role priorities as feasible and appropriate, which will likely require additional funding.

## Background

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This memo provides a set of recommendations for the design of a statewide building energy upgrade navigator program based on research conducted in fall 2023. This research included:

- In-depth interviews with 19 Washington stakeholders and 12 national market informants covering a range of topics relevant to the potential scope and purpose of a statewide navigator for Washington.<sup>1</sup>
- A literature review of more than 20 reports and documents and 50 Clean Energy Implementation Plans. The data embedded in these documents present results from hundreds of conversations with Washington residents and the community organizations that serve them.

<sup>1</sup>WA stakeholder interviews ranged from 30-90 minutes, conducted via Zoom or phone. Includes community organizations (6), financial entity (1), HVAC distributor (1), elected officials (4), utilities (5), and workforce/training organization (2). Questions included who should be prioritized, what are barriers/challenges to access currently, what are functions a statewide navigator could perform to solve for increasing access.

- Input from 86 stakeholders collected from an online survey distributed via a Department of Commerce listserv. Input from 141 attendees of a virtual stakeholder summit convened on November 29, 2023 to review preliminary findings.

The research team synthesized the above data to identify priority populations, barriers to access, and potential activities for a new statewide navigator. This memo provides a summary of our findings and recommendations.

## Five design principles

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Five principles emerged from the synthesis of stakeholder input. The research team recommends policymakers use these principles to guide decisions about the selection and scope of activities the navigator will undertake.

**1. Centralize functions that cannot be effectively performed at the local level.** An important through line in the research is the tension between **centralization/uniformity** and **local control/variety**. In scoping the activities of a new statewide entity, policymakers can attend to this tension by evaluating, for each proposed activity, whether the benefits of centralization (uniformity, efficiency, scale) outweigh the benefits of local control (cultural and geographical specificity, ability to pilot/innovate, support of small businesses). Our findings indicate the navigator should focus on coordinating, aggregating and disseminating information, developing tools, and using its statewide perspective to direct resources to underserved areas, while assigning many service delivery and messaging tasks to established and trusted community-based entities. If gaps in service delivery are identified, for example in a particular geographic area, the navigator could provide resources for new or existing organizations to expand their operations. The navigator could also decide to hire staff to provide these services directly.

**2. Focus on strategic rather than tactical objectives.** A new statewide entity will enter a field crowded with service providers of varying types and capacities, each with its own approach to providing efficiency and electrification services. Rather than superseding or duplicating the tactical work of existing entities, for example by picking a single implementation model or solution set and performing these activities statewide, we recommend the navigator retain a strategic perspective. As a **strategic entity**, the navigator will prioritize long-term planning and activities that are most effective, or only possible, when centralized. Where a tactical entity would focus on the performance of a narrow range of specific tasks, as a strategic entity the navigator will be able to:

- Coordinate and lead
- Identify and fill gaps
- Encourage innovation by supporting a diversity of implementation approaches
- Recognize and disseminate successful approaches
- Adapt to changes in funding, priorities, technologies, and new information

**3. Start simple and design with room to grow.** The research team strongly advises policymakers to task the navigator with a **limited set of achievable and high-value tasks** in its first three years. Washington stakeholders unanimously cautioned the State to grow the navigator’s capacity over time, rather than attempting to do too many things, at too great a scale, at the start. Technology professionals also advised the State to start simple in its software and database implementation: consolidating

information about available incentives/programs into an easy-to-use portal first, rather than trying to build complex integrations with multiple external systems right away.

**4. Move quickly.** Stakeholders provided overwhelming support for **moving quickly** to meet the urgency of the climate moment.

**5. Maximize existing resources before starting up new services.** Stakeholders urged the State to prioritize actions that enable better use of existing resources before creating new services, programs, or offers, particularly in the navigator’s first two years. Input from Washington informants and U.S. experts emphasized the importance of first understanding how well existing resources are being utilized, identifying gaps, and improving coordination in the State before establishing new service delivery. An exception to this is preparing to integrate funding from the Inflation Reduction Act (IRA), an important task that most of the national interviewees felt should be a core responsibility of Washington’s new energy navigator.

## Year 1 Objective: Facilitate access to existing resources

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An overwhelming request of stakeholders is that the navigator **facilitate greater access to existing resources**. To that end, the research team recommends the navigator take as its highest priority enabling broader access to and use of currently available resources (including funding anticipated to flow from the IRA).

Stakeholders also emphasized the **urgency of the need for action**. To act quickly, the team recommends the navigator focus narrowly and work in “sprint” mode, aiming to accomplish three objectives in its first year:

### 1. Establish a mechanism for statewide coordination across all entities delivering efficiency/electrification services

- Create a network to promote information sharing and learning, specifically to enable gap assessment and surfacing/sharing of successful practices.
- Identify key statewide performance metrics and create a simple system for tracking them.
- Identify potential service delivery gaps and assess opportunities for expanding services via existing entities vs. procurement of new services.

### 2. Create a public-facing information hub

- A website with a phone line that provides:
  - Information on all available financial incentives, including Federal, State, regional, and local rebates, tax credits, grants and providers of low-cost financing.
  - Referrals to organizations providing services in the customer’s geographic area.
- Develop this hub based on user research to ensure it meets the needs of community-based organizations, Washington residents, tribal citizens, trades, and other anticipated users.

### **3. Use a transparent procurement process to direct new funding to proven community-based organizations with attention to underserved areas**

- Identify existing community organizations that have proven successful in providing case management and project support and direct new funding to them, allowing them to expand service to more households.
- Informed by gap analysis, direct funding to organizations working in underserved areas or organizations that can expand their areas of service. If no viable options are identified, the navigator could consider strategies for directly serving these areas.
- Expand funding to organizations supporting workforce development, particularly those supporting the entry of priority populations into the trades and supporting tradespeople in rural areas.

## **Years 2+ Objectives: Develop new tools, increase alignment, and expand service delivery**

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In and after Year 2, the research team recommends the navigator build on its Year 1 work to enhance the level of support and coordination it provides. The team expects Year 2+ tasks could include the development of tools and processes that lessen the burdens on service delivery organizations and increase efficiency of service delivery. Examples of tools interviewees suggested include income verification, a uniform application, and aligning qualified equipment requirements and/or qualified contractor requirements.

Table 1 (below) lists potential actions identified while developing this memo, by category and priority. Activities in the “Year 1” category are key building blocks for future navigator activities. Activities in the “Years 2+” category were judged by the team to be feasible only after successful implementation of Year 1 activities. Years 2+ activities assume that as the navigator builds trust and competence, and develops its core coordination and data infrastructure, it can expand to offer a broader set of services.<sup>2</sup>

<sup>2</sup> This first research phase focused on residential households. In the next phases, the work will expand to include a focus on small commercial customers and residents of multifamily buildings.

**TABLE 1. POTENTIAL ACTIONS FOR A STATEWIDE NAVIGATOR, BY CATEGORY AND PRIORITY**

Year 1: Enable access to and use of existing resources	Years 2+: Expand resources/services	For longer term consideration
<b>Infrastructure</b>		
<p>Coordinate the efforts of federal, regional, state, and local (utilities and community organizations) providers of efficiency and electrification by:</p> <ul style="list-style-type: none"> <li>Tracking all organizations providing services to identify gaps in service by geography, ethnicity, income</li> <li>Surfacing successful approaches and share learnings across organizations.</li> <li>Identifying highest priority metrics to track and develop a system for collecting, storing, and reporting these data</li> </ul>	<p>Look to expand coordination and centralize additional services/tools:</p> <ul style="list-style-type: none"> <li>Align equipment qualifications across providers</li> <li>Income verification tool/data (integrate tool created for IRA or create new)</li> <li>Common application across different funding sources/programs</li> </ul>	<ul style="list-style-type: none"> <li>Streamlining and simplification of requirements for low-income programs</li> <li>Database of audit results and measure-level opportunities for each building</li> <li>Centralized reporting to commerce for utilities</li> <li>State-level qualified contractor network</li> </ul>
<b>Information</b>		
<p>Establish a centralized information hub (website/phone line) that:</p> <ul style="list-style-type: none"> <li>Provides information on all available financial resources, based on the user's location, income, family size, other characteristics</li> <li>Connects residents to local organizations providing services</li> <li>Incorporates referrals to local organizations for information/outreach materials that are culturally relevant (i.e., offer information in several languages)</li> <li>Trains potential users on how to use the website/resources</li> </ul>	<p>Consider adding additional functionality:</p> <ul style="list-style-type: none"> <li>Equipment qualified for each rebate</li> <li>Connections to energy auditors, contractors/trades</li> <li>Unbiased technical information on prioritizing actions</li> <li>Info for tax preparers on tax credits</li> </ul>	<ul style="list-style-type: none"> <li>Outreach to schools</li> <li>Technical info for tradespeople</li> <li>Info on the harms of using natural gas in the home</li> </ul>
<b>Financial</b>		
<p>Track and provide information on low-cost financing options for efficiency/electrification projects</p>	<p>Consider establishing additional financing options by creating or integrating with:</p> <ul style="list-style-type: none"> <li>A green bank</li> <li>Low-cost on-bill financing</li> <li>CPACER loan programs</li> </ul>	<ul style="list-style-type: none"> <li>Rebates for fuel-switching</li> <li>Midstream rebates to distributors/retailers instead of end users</li> </ul>
<b>Workforce</b>		
<p>Provide support to programs that train trades and encourage more people to enter trades</p>	<p>Consider additional steps to increase the efficiency/electrification workforce:</p> <ul style="list-style-type: none"> <li>Creating a statewide network of energy auditors, qualified contractors, and electricians</li> </ul>	<ul style="list-style-type: none"> <li>Ensuring quality work - sizing of equipment, installation;</li> </ul>
<b>Project Support</b>		
<p>Provide financial support to local organizations that are proven to be effective at helping people prioritize projects and plan to make improvements over time</p>	<ul style="list-style-type: none"> <li>Consider funding and guiding the establishment of new organizations in underserved areas</li> <li>In areas where local providers are not available: <ul style="list-style-type: none"> <li>Conduct energy audits</li> <li>Perform case management functions</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>Provide project development for difficult to serve buildings like multifamily rental housing.</li> <li>Support non-energy-related household repairs (i.e. roofs)</li> </ul>

# Appendix

## Priority Customers

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Our research revealed a general consensus that the following customer segments are high priority populations for the navigator. While there are a variety of ways priority populations are characterized, we found income, housing status, and building type emerged most commonly through interviews and in the literature.

- Low income (under 80% median)
- Moderate income (~80-120% median)
- Renters and multifamily building owners
- Small commercial buildings
- Rural areas
- Tribal nations and communities
- Vulnerable for other reasons (e.g., language, age, ability)

## Eight Key Needs

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Stakeholder interviews, national efforts, and existing literature indicate eight core needs are critical to address if policy makers and program designers want to improve access to efficiency and electrification. These needs provide context for the navigator’s work, although the navigator may not address all of them.

1. Trusted messengers
2. Increased awareness of funding and services
3. Unbiased information about highest priority projects
4. Funding sufficient to enable participation among all qualified households
5. Grants, subsidies and other solutions (including low-cost financing) that lower upfront and total cost
6. Streamlined referrals to services that one is qualified for
7. Technical support that reduces the time and complexity to complete a project
8. Access to high-quality service providers and contractors

## Risks

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The following risks emerged in stakeholder interviews and literature.

### Of creating another entity

- Add complexity to an already complex process.
- Don’t want navigator to prevent utilities from reaching their regulatory targets.
- Policymakers design the navigator, and it doesn’t meet the needs of communities.
- The navigator would market opportunities but then not have enough funding.
- It will be poorly designed/executed.

- It won't have specific enough goals/tasks.

### Of centralizing activities

- Inhibit innovation because too much control is centralized, "cookie cutter."
- No single audit format will work for all utilities.
- It will take too long because there are so many entities that need to weigh in.

### Of collecting and managing data

- Risks and costs associated with managing personally identifiable information (PII)
- Potential to use the database for punitive means (especially with small businesses).
- How will the database be paid for/maintained?

### Of encouraging electrification

- Electrification for low income (LI) and low-middle income (LMI) households can increase their costs.

### Other

- Just building a website will not help EJ communities.
- Community-based models may not scale.
- Short-term funding will inhibit new organizations from starting up to serve new geographic areas.

## Barriers to Adoption

Table 2 lists all the barriers to adoption identified in interviews with stakeholders and key informants and existing literature. These barriers may prevent homeowners, renters, and small businesses from accessing electrification and energy efficiency services and funding.

**TABLE 2. BARRIERS PREVENTING ENERGY EFFICIENCY AND ELECTRIFICATION**

Barrier Category	
<b>Lack of information/awareness</b>	<ul style="list-style-type: none"> <li>• Hard to find/identify low to moderate income qualified households</li> <li>• Lack of awareness of rebates/measures</li> <li>• Multiple programs with different eligibility restrictions</li> </ul>
<b>Financial</b>	<ul style="list-style-type: none"> <li>• Upfront cost, even after rebates</li> <li>• Lack of financing</li> <li>• Split incentives that limit interest particularly for rental properties</li> </ul>
<b>Workforce</b>	<ul style="list-style-type: none"> <li>• Lack of labor to do the work</li> <li>• Limited supply of qualified contractors</li> </ul>
<b>Interest in/ability to complete projects</b>	<ul style="list-style-type: none"> <li>• Failure to link upgrades to other benefits including health, safety, and reduced financial stress.</li> <li>• Other priorities deemphasize focus on energy projects</li> <li>• Lack of know-how/time to complete projects</li> <li>• (Perceived) complexity of doing the work</li> <li>• Lack of trust</li> <li>• Lack of holistic information (about what to do in one's home when)</li> <li>• Trust/language/local cultural needs/undocumented people</li> </ul>

## Barrier Category

### Infrastructure

- Weatherization programs' red tape
- Cannot combine rebates because equipment requirements differ
- Lack of incentives for delivered fuels
- Multifamily/condo governance structure

## Software and Technology Solutions: Insights from Other Programs and Technology Providers

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Interviews indicated the need to define **clear business needs** and **prioritize simplicity**.

**Clear Business Needs.** Focus first on consolidating information about available incentives or programs into an easy-to-use web portal that supports three basic use cases: (1) households looking for information on what they might be qualified for; (2) contractors helping households identify programs or rebates they may be qualified for; and (3) implementers/community organizations helping both households and contractors navigate the programmatic landscape.

**Starting Simple.** The initial focus should be on consolidating information and outreach for state programs into a basic customer lookup portal that avoids extensive data collection. Integrations with external programs and systems, building custom contractor interfaces, collecting user data, and developing complex software systems are longer-term goals with more risks/challenges.

Avoid the potential complexity of integrating data from multiple customer information systems or application programming interfaces (API) by refraining from collecting, storing, or sharing sensitive user data (personally identifiable information, or PII). The precise definition of PII can vary by program administrator, but name, address, home condition, utility, and/or energy consumption generally fall into this category.

Get simple, consolidated information to customers before tackling complex software builds:

- Building a simple customer-facing web portal for basic program/incentive lookup based on user inputs like income, address etc.
- Consolidating information about state clean energy programs and funding sources.
- Coordinating outreach across state-funded programs.
- Leveraging existing tools (on-line marketplaces, the Home Energy Score API, clearinghouse websites, tools developed to support IRA fund distribution) where possible.

In the longer-term the navigator could consider:

- Building integrations with external systems like utility programs.
- Enabling online application submission/tracking.
- Developing customized contractor/trade ally interfaces.
- Collecting and storing sensitive user data.

## Other Considerations

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Stakeholders suggest four areas in which the navigator proceeds with caution.

**1. Providing direct services or messaging to local communities where there is already existing capacity.** Stakeholders agree that community-based organizations, located in and trusted by their community, are best equipped to provide customized, culturally and geographically specific services, including energy audits, case management, and outreach and messaging. The research team recommends that in Year 1, the navigator direct financial and technical support to existing community organizations to help them expand their capacities and services rather than performing these services itself and, in Years 2+, consider supporting the expansion of existing or start-up of new organizations as appropriate to reach underserved areas.

**2. Establishing competing workforce training or workforce certifications.** Stakeholders agree that the navigator can support existing organizations doing this work but should avoid offering its own training or certifications. Policymakers should consider strategies for supporting existing analysis/workforce roadmaps to support goals of growing the workforce statewide.

**3. Creating new “programs.”** Stakeholders do not want the navigator to duplicate the existing work of state, utility, or community-based programs. Interviews with U.S. experts also cautioned the State to avoid disrupting established organizations that have longstanding relationships with clients in their service territory.

**4. Developing a large-scale household or building-level information database.** Stakeholders are wary of the navigator developing a database to house statewide household- or building-level data. Their concerns include data privacy and the investment of substantial financial and labor resources in a single software solution. Rather, stakeholders and technology experts recommend the State start by tracking a small set of data judged to be of highest importance to the navigator’s Year 1 strategic goals of statewide coordination, aggregation of information on resources, and identification of service gaps and successful approaches.

## Suggestions for next steps in the research and engagement process

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In 2024, we propose focused work sessions with invited experts to refine the navigator’s role and actions in order to:

- 1. Refine scope and cost of potential data management tasks including exploration of each stage of the data management lifecycle.** What are the primary business functions for the navigator in and after Year 1? What existing public and off-the-shelf tools are available to begin developing core service requirements (e.g., program, funding, and eligibility tracking, including customer details and project/rebate data)?
- 2. Refine the navigator’s approach and objectives to statewide coordination among all entities delivering efficiency/electrification services.** What should the navigator do to establish coordination across all entities doing efficiency and electrification, and to create a learning environment in the state? Which data should the navigator track to enable greater statewide knowledge and progress tracking, and identify gaps? Should there be a sequencing of this coordination effort – e.g., should the navigator begin with coordination across all state and federal programs in Year 1, then expand to local, BPA, and utility programs? How

similar/different are these strategies by each priority segment (e.g., moderate income, property managers, and small businesses)?

- 3. Research to support development of a public-facing information hub.** What should the navigator do to be able to serve as a one-stop-shop for information on available financial resources and technical information, and direct users to local organizations that can provide energy audits and other direct services? What are clearly defined business needs for this technology and what information is relevant for external (e.g., customers, contractors, CBOs) vs. internal (e.g., administrative, analytic) facing functions?
- 4. Inform the process for directing new funding to proven, successful organizations with attention to underserved areas.** How should the navigator direct funding to local organizations to provide project support to building owners? How should the navigator direct funding to organizations that support the trades, including those that work to improve their knowledge/skills and to bring new workers into the trades, especially in rural areas?
- 5. Obtain additional insight into specific needs of small commercial, multifamily building owners and tribal nations and communities.** Research to-date has focused largely on the needs of Washington's residential households. Additional inquiry is needed into the ways a navigator could increase access to efficiency among small commercial and small multifamily building owners and how their needs differ from the needs of residential owners. How can the navigator provide tools to support to both tenants and landlords in improving rental spaces?
- 6. Suggest approaches to ensure the navigator's process and outcomes prioritize underserved households.** How will the State ensure the navigator's work is equitable? What tools and metrics could be incorporated into the role to serve as guides in this process? These could include an equity lens and creating quantitative resource allocation and outcome metrics.
- 7. Refine costing estimates for specific navigator functions.** How best to allocate available funding to key navigator functions, particularly in directing new funding for increased services? What contingencies exist for key funding sources that may require integration of specific functions (e.g., home energy assessments for IRA)?
- 8. Provide an initial assessment of geographic/cultural gaps in efficiency services based on existing research.** Use the draft LI needs assessment to prepare maps and summary documentation for gaps in service delivery. Are barriers to delivery consistent with prior research to-date or more nuanced?

## Findings and recommendations on two topics of interest to navigator advocates: (1) home energy assessments and audits; and (2) data tracking and management

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### Home energy assessments and audits

Advocates for a new statewide navigator have expressed interest in the navigator performing, or subcontracting other entities to perform, home energy assessments or audits. Assessments and audits have been an important tactic for identifying opportunities for energy efficiency since the 1980s. These services have increased in sophistication since that time and have historically been a key first step for “whole home” energy efficiency programs. However, recent research indicates conversion rates from audit to implemented efficiency improvements are variable and suggests that, in addition to the information provided by the audit itself, both financial and nonfinancial factors play an important role in motivating action.<sup>3</sup>

Interviews with Washington stakeholders suggest the current availability of assessments and audits varies throughout the state. Some interviewees’ organizations provide comprehensive home energy audits that include blower door tests and infrared imaging while others said their organizations offer only visual assessments or no evaluation at all. A systematic review of organizations providing these evaluations would need to be completed to understand where audits are and are not available statewide.

In interviews, a lack of availability of audits was not prioritized by stakeholders as a key barrier to greater adoption of energy efficiency and electrification in the State. However, increasing the availability of audits may be a helpful tactic in service to the navigator’s strategic goal of increasing adoption of efficiency and electrification. If it is determined that the navigator should focus its resources on audits as a tactical measure, the team recommends the navigator do two things:

- 1) Assess when the use of audits has proven successful at increasing the adoption of efficiency measures in Washington and in other states and develop recommendations for how to deploy additional audit capacity in the future based on these success stories.** Community based organizations in Washington have energy efficiency program models they believe are successful at moving building owners to adopt improvements, many of which begin with a comprehensive energy audit. The navigator can learn from the experiences of these and other- organizations about the factors that facilitate a high conversion rate from audit to implemented measures and also how audit data can be used to increase the overall effectiveness of efficiency funding in the State.
- 2) Evaluate the various options for increasing audit capacity in the state** – for example: funding existing organizations to perform audits, supporting development of auditing capacity among high priority groups in the workforce, hiring/subcontracting navigator staff to perform audits.

<sup>3</sup> An evaluation of NYSERDA’s Home Performance with ENERGY STAR program found a median conversion rate from audit to program participation of 23%, with enormous variation by contractor, from 4% to 90%. Research Into Action, Inc. *2012-2013 Home Performance with ENERGY STAR Process Evaluation/Market Characterization Assessment: Final Report*. 2015. Prepared for NYSERDA. An ACEEE study cited multiple sources for audit conversion rates, ranging from 1% (homeowners that implemented all audit recommendations) to 85% (one recommendation), and concluded that overall conversion rates tend to be around 30% and that “home energy assessments are somewhat effective but could be improved, particularly for encouraging the adoption of higher-cost recommendations.” ACEEE. 2019. *After the Audit: Improving Residential Energy Efficiency Assessment Reports*. Report B1901.

## Data collection and management

Advocates for a new statewide navigator have expressed interest in the navigator collecting and managing data. Stakeholders mentioned a wide variety of data that may be helpful for the navigator to collect and manage including: building-level energy efficiency opportunities, building owner decision-making characteristics, building owner qualification for financial resources and services, household-level income data for verification purposes, equipment eligibility for various financial incentives, and qualified contractor information.

The research team recommends the navigator take a **“data lifecycle” approach** to scoping its data collection and management activities. This approach treats data management as a process with distinct phases and can be used to prioritize and plan the navigator’s data-related activities. Typical data lifecycle phases include planning, collecting/creating, maintaining, accessing/sharing, evaluating, and archiving/destroying.<sup>4</sup> The use of the data lifecycle approach can help ensure the navigator’s time and resources are used efficiently by prompting the navigator to develop a detailed plan for collecting, maintaining, storing, and using data before committing resources to data collection or software development.

For example, there are a variety of ways in which building-level efficiency opportunities could be collected/created, maintained, and accessed/shared. The City of Portland, Oregon provides one example of the data lifecycle for building-level efficiency opportunities. In Portland, a city ordinance requires a **DOE Home Energy Score** for all single-family homes listed publicly for sale. In this data lifecycle process, the sale of a home triggers the collection of building-level data and data are maintained by the requirement to re-score a home the next time it is listed for sale. The score and energy assessment data are uploaded to a database maintained by DOE at no cost. The City pays a small fee to a private non-profit that maintains a second database; the [Green Building Registry](#) is publicly accessible via a website and provides customized reports on score and assessment data to approved users. The specific use cases of the collected data are less clear, but anecdotal accounts suggest the data have been used by researchers for analysis purposes and by efficiency rebate providers to target marketing efforts.<sup>5</sup>

## Key Informant Interviews

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This first phase of research had an abbreviated timeline. The team completed 13 interviews with a variety of organizations representing expertise in software and website development, provision of statewide financing and information, local organizations with navigator-like elements, and advocates tracking navigator efforts in state and local jurisdictions across the US.

<sup>4</sup> Example online resources include: [https://data.wisc.edu/data-literacy/lifecycle/#:~:text=Data%20lifecycle%20stages,Collect%2FReuse%2C%20and%20Destroy](https://data.wisc.edu/data-literacy/lifecycle/#:~:text=Data%20lifecycle%20stages,Collect%2FReuse%2C%20and%20Destroy;); <https://www.ibm.com/topics/data-lifecycle-management>.

<sup>5</sup> It is notable that the guidelines for IRA funding for HOMES include expectation that these programs will conduct home energy assessments and summarize these data in reports to DOE. This requirement could provide an opportunity to establish uniform tracking of assessment data and program results. Jurisdictions across the U.S. are currently considering options for deploying tools consistent with this guidance.

**TABLE 3: COMPLETED INTERVIEWS: PHASE 1**

Organization	Notes
<i>Software/Web Portal Interviewees</i>	
<b>Bilberry</b>	Discussed software solutions and components
<b>Canopy Climate</b>	Discussed software platform and website and portal elements
<b>Enervee</b>	Discussed software platform that supports marketplace and instant access to financing for middle income households
<b>Think Shout</b>	Discussed software solutions and components, particularly database and web portal elements
<b>Utility API</b>	Discussed software solutions and components, including integration of multiple API
<i>Comparable Program Element Interviewees</i>	
<b>Earth Advantage</b>	Discussed software solutions associated with audit and energy performance score tracking
<b>Efficiency Vermont</b>	Discussed lessons learned from Efficiency Vermont and DC Sustainable Energy Utility
<b>Michigan Saves</b>	Discussed elements of MI green bank consistent with navigator services and local examples of more expansive navigator-like case management
<b>Oregon Department of Energy: Navigator</b>	Discussed Oregon's approach to deploying an energy navigator and incorporating IRA funds
<b>Rewiring America</b>	Discussed efforts in other states and local jurisdictions consistent with navigator objectives
<b>Sustainable Living Center</b>	Discussed experience as local organization with navigator-like elements
<b>Sustainable Energy Trust</b>	Discussed experience providing referrals and information to projects seeking financing
<b>Switch is On</b>	Discussed software platform (website and portal elements) and market/community outreach strategies

The team expects to complete a second round of interviews in early 2024 to fill in some remaining gaps and coordinate with contacts who were not available in October 2023. A preliminary list is provided in Table 4.

**TABLE 4: PRELIMINARY INTERVIEWEE LIST: PHASE 2**

Organization	Notes
<b>ACEEE</b>	Discuss national research effort and identify additional navigator models, if available
<b>Ameren Illinois</b>	Discuss multifamily one-stop-shop program effort
<b>City of Ann Arbor</b>	Discuss hyper-local concierge program to help residents decarbonize

Organization	Notes
City of Holland	Discuss hyper-local concierge program that recommends whole home improvements and provides significant rebates to customers
Climate Imperative/ Elevate Energy	Understand experience with implementing navigator like services
Community Energy Project	Portland-based CBO that stacks utility, state, and grant dollars to reach underserved households
Energy Trust of Oregon	Lessons learned from near statewide effort to deploy programmatic information, especially to underserved communities and in stacking funds from multiple sources
IMT	Discuss buildings hub for Washington DC
Philadelphia Energy Authority/Built to Last	Follow up on request (deferred to January) for a hyper-local full-service navigator program that stacks funds and completes comprehensive building upgrades
MassSave	Lessons learned from large scale umbrella brand development
Sealed	Understand financing option

## Visions for a Successful Statewide Navigator

Through a stakeholder workshop with over 170 attendees, we received the following input on what success would look like for the WA navigator over the next three years – the following section summarizes some overarching themes.

### **There is a well-known source for information (online and by phone) on all available financial resources and unbiased technical information on how to prioritize projects.**

*You can call a phone number and actually speak with a real person about energy efficiency/ home upgrades. They can provide you with a detailed list of rebates you are qualified for.*

*Federal and state incentives all in one place.*

*My local high school teaches access to the navigator and how to choose energy mode and use wisely.*

*We as volunteer community outreach groups have a tool that we can share with those in our local communities. We've been trained by WA Commerce on how to use it and the wealth of what's available.*

*Energy efficiency and solutions are more commonplace knowledge to the public and everyone knows where to look for answers.*

*The statewide navigator is a reliable resource to find rebates and incentives.*

*A fantastic website where homeowners, contractors, power utilities, distributors, and manufacturers go to access information at energy programs.*

### **Washingtonians understand which projects to prioritize.**

*Helped me make decisions about what rebates to try to access in a way that really does reduce the overall carbon footprint. Helped my whole community become more resilient to weather.*

**Existing, proven organizations get more funding and can help more building owners carry out efficiency and electrification projects.**

*Substantial increases in funding have been awarded to proven and already functioning local efficiency programs (especially where they are "whole-building-retrofit" focused). Replicable results!*

*Provided information to all owners to allow them to plan their home upgrades and "game plans."*

**Efficiency and electrification projects are easier and more accessible.**

*It's easier for everyone to choose energy efficient systems for their home that result in comfortable places for people to live.*

*If I want to make an energy improvement at my home or business, I know there is a knowledgeable and trusted advisor who can make sure I take the most advantageous approach.*

*Helped me to connect residents in my city get easy access to money and resources to get more energy efficiency measures installed.*

**There is ample labor to do the work, especially in areas that are currently underserved.**

*I've built out my energy auditing company, created jobs, helped clients, and increased my product offerings to include ductless heat pump installations.*

*We have energy audits available for those that need them.*

**State knows key metrics showing whether we are on track to meet goals.**

*We're on track to achieve 100% weatherization and electrification of all homes and businesses in Washington by 2045.*

**State knows where gaps in service are can direct funding to fill them.**

*The navigator will give great metrics and reporting to inform our advocacy asks - policy and budget advocacy, to advance efficiency and electrification at scale needed.*

**Multifamily buildings are being retrofitted.**

**Massive, equitable uptake of energy efficiency and electrification across the state.**

*My volunteer group would be seeing MANY friends and neighbors electrifying their home heating and cooking systems.*

*Low-income residents are accessing energy programs at the same or higher rate as higher income residents.*

**State is learning and leading.**