

# **Training Subcontractors for Effective Program Support**

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# Introduction

## - **Session Topic**

- ◆ Provide understanding of the keys to success & problems
- ◆ Provide practical examples and tips

## - **Structure**

- ◆ Keys/ differentiators/ lessons learned
- ◆ Open discussion format – ideas encouraged

## Key Actions for Good Subcontractor Performance

- **Establish clear, specific policies and procedures**
  - ◆ Manual
  - ◆ Goals
  - ◆ Training

EmPower New York<sup>SM</sup> Electric Reduction Audit Process Flow

Pre-Audit Procedures

Accept Referral on CRIC

Print Customer Survey Data and Fully Review Prior to Scheduling audit (including utility usage)

Contact Family to Arrange Visit

- Review usage data for seasonal spikes and baseload usage
- Review referral source

- Confirm that at least one primary household member will be available
- Emphasize that the visit will be fun
- Review address and check for directions
- Ask them to think about questions or concerns and write them down
- Tell them approximately how long the visit will take
- Be sure they know that the visit will involve a tour of the house
- Emphasize that there will NO COST to them
- Reassure them that you will have ID and request that they ensure to check it upon arrival

On-Site Audit Procedures

Customer Introduction

Check all appliances in use in the home and meter if needed.

Invite customer to join you at the main thermostat location

Invite customer to join you at the kitchen sink and complete water temperature test.

Invite customer to join you at the main heating source

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- Introduce yourself
- Show proper company ID
- Explain EmPower New York<sup>SM</sup> Program and that there's no cost for the measures
- Discuss how customer was referred
- Determine current steps customer already undertaking to save energy
- Validate home owner status
- Brief overview of audit procedures
- Determine if customer received EmPower packet and reviewed materials
- Review specific customer issues from survey
- Ask permission to start audit & request customer's participation

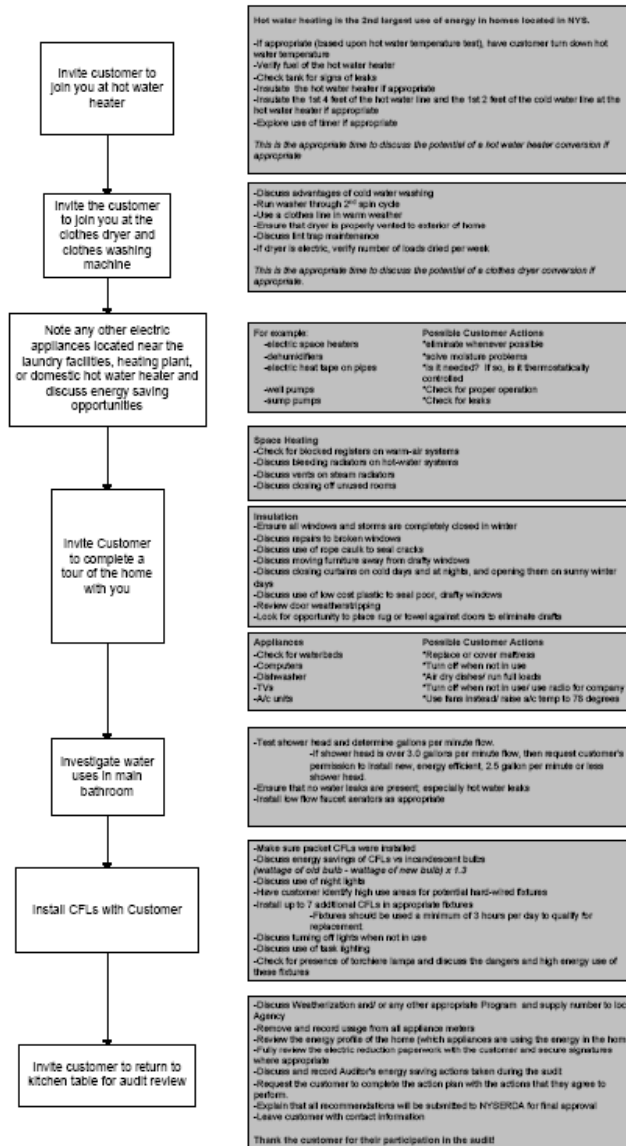
This is the appropriate time to explain to the customer that the goal of this visit is to create specific energy saving actions for the customer to take that will lower their energy usage.

- Metering is required for all freezers and refrigerators that are not in NYSEG's on-line refrigerator calculator.
- Meter should be set as soon as possible to allow for the most accurate reading
- Evaluate appliance location
- Is 2nd freezer or refrigerator full?
- Discuss possibility of eliminating 2nd freezer or refrigerator or using only when needed (i.e. Holiday time)

- Heating is the largest single use of energy in homes located in NYS.
- Discuss current temperatures and set backs
- Investigate any thermostat problems
- Estimate any additional setback savings
- Explore programmable thermostat options
- 1% of heating energy can be saved for every 1 degree of set back for an 8 hour period
- 3% of heating can be saved for every 1 degree set back for a 24 hour period

- Run water into a glass and measure temperature with a meat thermometer
- Record actual water temperature on Electric Reduction form
- Is water temperature above 120 degrees F?
- Explain to customer the potential for energy savings for reducing water temperature.

- Verify fuel of the heating appliance
- Discuss the benefit of cleaning and tuning of heating system
- Discuss filter maintenance and ductwork condition if it's a central furnace



## Key Actions for Good Subcontractor Performance

- **Establish on-going communication support processes**
  - ◆ Individual Subcontractor contacts
    - Performance
    - Goal attainment
    - Program Revision
  
  - ◆ Subcontractor network as a whole contacts (if appropriate)
    - Shared learning
    - Program revisions
    - Feedback

## Key Actions for Good Subcontractor Performance

- **Routine review of Subcontractor performance with all program partners**
  - ◆ Performance
  - ◆ Goal attainment
  - ◆ Potential program revisions
  
- **Quality assurance program**
  - ◆ Formalized
    - % of work inspected
    - Consistent scoring system
    - Problem remediation procedure
  - ◆ Communicated
    - Routine

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## Impacts of Different Program Designs

- **Market based programs**
  - ◆ Assignment control
  - ◆ Contractor screening control
  
- **Subcontractor agreement ownership**
  - ◆ Ability to control
  - ◆ Extent of penalty/ incentives
  
- **Subcontractor relationships**
  - ◆ Extent of competition
  
- **Program structure**
  - ◆ Well defined
  - ◆ Conducive to Subcontractors
  - ◆ Includes right provisions



## Pitfalls to Avoid

- **Unclear/ vague procedures and guidelines**
  - ◆ Poor performance
  - ◆ Subcontractor frustration
  - ◆ Customer complaints
  
- **Mismatched Subcontractor abilities with program goals**
  - ◆ Unsuccessful program – lack of goal attainment
  - ◆ High Subcontractor turn over
  
- **Poorly communicated program changes**
  - ◆ Inconsistent program implementation
  - ◆ Poor program evaluations

## **Pitfalls to Avoid**

- **Lack of adequate training**
  - ◆ Health & safety concerns
  - ◆ Customer complaints
  
- **Lack of consistent quality assurance program**
  - ◆ Poor workmanship
  - ◆ Program integrity concerns/ fraud
  
- **Lack of field review**
  - ◆ “Assuming all is good”
  
- **Reactive vs proactive Subcontractor management**

## Conclusion

- Program Design
- Training
- Effective, Ongoing Communication
- Quality Assurance

**\* With the ultimate goal of effective Subcontractor management being program success through increased Subcontractor effectiveness and avoiding subcontractor...**

# Burnout



# Questions/ Comments?

