

Winchester Senior Energy Grant

Pilot: April 2014 - April 2015

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Objective:

Help Seniors save energy and save money, enabling them to stay in their homes and stay in Winchester.

Background:

Winchester High School is undergoing a 129 million renovation that will raise the average property tax bill by roughly 10%. Seniors, alarmed at the impact this tax hike would have on their disposable income, lobbied for a tax cut. The Town was unable to comply. Instead, Terry Fuller, Chair of the Council on Aging, decided to create an incentive for Seniors to save on energy so they could afford the higher taxes and remain in the homes and town they love. By and large, these residents have been occupying these homes for many decades.

Formation:

Terry secured \$20,000 in private funding, from Cool Winchester/Sustainable Winchester; The Winchester Council on Aging and the Winchester Coop Bank. The funds to be used for "grants" for energy saving improvements.

A board of three representatives from the three funding organizations reviews and votes on each grant. Applicants are anonymous.

Structure:

Winchester Senior Energy Grants offer to double a rebate or incentive available on energy saving appliances or services, such as insulation, up to \$800. There is a means test, administered by the trusted Administrator of the COA at the Senior Center.

(<\$80,000 for a couple, <\$75,000 for a single person.) Also, the house-holder must get a Mass Save audit.

As Seniors enter the grant process, they are given the option to get help from a Cool Winchester volunteer, or "mentor." The mentor meets with the homeowner, is present for the audit, helps to interpret the audit results, assists in booking the insulation work, is present for the insulation work and otherwise is a trouble shooter. Comcast cable down? Wall starts to break due to pressure of blown-in insulation? Attic opening too small for the insulation crew? Mentors have helped to solve all of these problems and many more.

Winchester Senior Energy Grant partnered with two Mass Save affiliated companies: Next Step Living and Homeworks. Specific auditors were selected to work with seniors, thought to have the attributes needed for these interactions - patience and consideration.

Outreach:

Extensive publicity for the program carried from spring, through summer and into fall.

Outreach included:

- Front page local newspaper story announcing the program,
- Posters and hand bills at the Senior Center and the Coop Bank through out the year,
- Insert in the October water bill, sent to all residents,
- Information in the Senior Center newsletter consistently,
- Marketing table after Senior Fitness class (most popular activity at the Senior Center.)
- Multiple presences at Selectmen's Meetings with local access TV,
- Presence at the Farmer's Market every Saturday through the summer and
- Presence at Town Day in June.

Results:

Forty three applications have been completed and submitted. Sixteen projects have been committed or rebated. Twelve projects could not move forward due to external factors, such as health, mortality, mold, knob and tube, etc. Eleven Seniors elected to not move forward with work for their own reasons. Four homes had no work to be done. The average estimated annual savings is over \$1100 per house hold. Over \$100,000 worth of work was done. \$38,400 in Mass Save insulation work and \$7400 in "free stuff" like light bulbs and thermostats.

Conclusions

1. Junior Seniors and Senior Seniors

- a. Below about age 75, Junior Seniors are happy to be independent and handle something like the Mass Save audit on their own.
- b. Beyond 75 or 80, Senior Seniors are more comfortable having guidance, such as the "mentors" from Cool Winchester. This is key to keeping the Senior invested in the program and following through with the work.

2. Additional time (done by mentors)

- a. Audits took longer.
- b. Explanations were needed, sometimes repeatedly.
- c. Consideration of the homeowner.
 - i. Reminder call day before, including name and details.
 - ii. What color car or color shirt? (safety)
 - iii. Would you like me to take my shoes off?
- d. Sit down and review the audit.
- e. Assistance in decision making and booking appointments.
- f. If the mentors had not been present, almost no work would have been completed. Auditors and installers are in a great hurry because of how they are paid. This puts the Seniors off, they feel out of control. It's all too much. They are likely to opt out, despite the potential financial benefit.

3. Mass Save auditors are paid for a finite time, it is too short for seniors. The audit is completed and they are under time pressure to wrap up and leave.

4. Volunteer mentors as currently structured is not sustainable

- a. This is a major time commitment

- b. Should be wrapped up in the Mass Save brief
- 5. **Seniors respond to "free money" aspect of the grant**, creates incentive to access the larger savings within Mass Save.

Recommendations:

We think that some of our conclusions can help Mass Save better serve Seniors throughout the Commonwealth. We have proven that better service and follow through lead to higher rates of completion and greater savings for some of our most vulnerable, fixed income residents. We think trying the following tweaks to the existing program could lead to much greater adoption of Mass Save sealing and insulation work by Seniors throughout Massachusetts.

1. Senior specialists
 - a. Assigned to work with "Senior Seniors," 75+
 - b. Specially selected or self selected auditors/installers: considerate and patient
 - c. Interested in working with Seniors.
2. Training for Senior specialists
 - a. Brief, one-time training.
 - b. Consistent, common sense expectations about working with Seniors effectively
 - i. Be considerate
 - ii. Slow down and speak loudly
 - iii. Reminder call the day before any appointment, give Senior feeling of security - what car, what color shirt, etc.
 - iv. Be willing to repeat or explain again
 - v. Sit down and review the audit and its recommendations at the end of the audit. Emphasize the projected annual savings of insulation work.
 - vi. Installers may have to return more than once when they encounter unexpected circumstances; they should be paid accordingly.

- vii. Share pictures of recommended work, illustrate what will happen in their home insulation project.
- 3. Pay Senior specialists differently when working with people over 75
 - a. Additional time, up to 3 hours for audit and explanations.
 - b. Include follow up in their paid responsibility, assure questions are answered and appointments for insulation are made.
 - c. For installers, same thing - be considerate. Pay for additional time needed to do the job satisfactorily.
- 4. Market to seniors and their families. The substantial savings is very meaningful to our fixed income seniors. Market the "free stuff" like door sweeps, light bulbs etc.
- 5. Free thermostats for seniors should be easy to read and understand. Print is currently too small; they can't make them work.