

Colorado

Multifamily Properties

5+ Units



 **Xcel Energy**[®]

PARTNERS IN ENERGY
An Xcel Energy Community Collaboration



XCEL ENERGY PARTNERS IN ENERGY AND THE ROLE OF TOOLKITS

Xcel Energy Partners in Energy provides communities in Minnesota and Colorado free services to develop a Community Energy Action Plan as well as assistance implementing that plan. Each community has its own unique energy needs and priorities, and Partners in Energy tailors its services to complement each community's vision.

More and more communities are realizing that energy planning plays a critical role in helping them reach their goals. Wise energy choices yield many and varied benefits. By working with residents, businesses, and even their own government facilities, a community can shave dollars off utility bills, promote renewables, drive resource conservation, or make progress on greenhouse gas reduction goals. Partners in Energy helps identify local priorities and then structures a path that leverages all available resources.

As part of this offering, Partners in Energy has developed various toolkits to help communities implement strategies often identified in energy action plans or strategies that come up after a plan is developed and new priorities emerge.

For example, this toolkit focuses on how to realize increased energy savings in multifamily residential buildings with more than five units. Residential buildings in this size range have unique opportunities and challenges as well as utility programs designed specifically to help them overcome barriers to energy efficiency.

For information about other available toolkits or to customize any of the resources within this toolkit for your community, contact your Partners in Energy community facilitator.



Want to help your community reach multifamily properties?

This kit will help your community prioritize actions and connect you with the tools you'll need to get started. To customize the branding and language of any of the resources within, contact your Partners in Energy community facilitator.

HOW TO USE THIS KIT

Xcel Energy's Multifamily (5+ Unit) Toolkit will guide you through step-by-step instructions and resources to engage property owners and tenants, including owner-occupants, as well as management companies in energy conservation.

CONTENTS

Overview	1
What is a Multifamily Property?	1
Engagement Process & Tools	1
Guide to Reaching Multifamily Buildings	2
Step 1: Understand Your Target Audience	2
Step 2: Identify Multifamily Properties	5
Step 3: Develop Your Strategy	7
Step 4: Coordinate and Execute Your Strategy	14
Step 5: Track and Share Success	15
Resources	16
General Resources	16
Program Descriptions	20
Flyer Examples	23
Works Cited	28

If you have any questions, please feel free to contact your Xcel Energy Partners in Energy community facilitator.

OVERVIEW

Engaging multifamily properties in energy efficiency has become more and more important for communities. Properties with more than five units make up 21% of residential properties in Colorado (U.S. Census Bureau, 2013-2017). Focusing on properties with more than five units strengthens the impact of limited community resources because you have the potential to impact at least five households with one point of contact. However, it can be a large undertaking because of these properties' unique and varied ownership and occupant structures.

WHAT IS A MULTIFAMILY PROPERTY?

For this toolkit, we use the term multifamily to refer to any structure that has five or more units. These properties are typically owned and operated by building managers with tenants living in the units. When the individual units are owned by the occupant, it is referred to as a condominium (condo).

If you are considering multifamily properties with fewer than five units, use our [Partners in Energy 1-4 Unit Toolkit](#).

ENGAGEMENT PROCESS & TOOLS

The goal of this toolkit is to help you encourage property owners and management companies to take action on energy efficiency and renewable energy. The toolkit will guide you through the process of identifying properties, determining your target action, and planning and executing your strategy.



Connecting to Partners in Energy

Xcel Energy's Partners in Energy model empowers communities to address their energy goals and needs, while simultaneously supporting Xcel Energy's strategic priorities. Together, Xcel Energy and communities work on strategies that promote energy efficiency and renewable energy practices. The planning process is a crucial component to aligning your efforts with broader community goals. Be sure to use this toolkit's resources in alignment with your community's Energy Action Plan.

GUIDE TO REACHING MULTIFAMILY PROPERTY OCCUPANTS AND OWNERS

STEP
01

UNDERSTAND YOUR TARGET AUDIENCE

One of the most significant challenges you will face when you begin a multifamily outreach effort in your community will be to understand, identify, and prioritize your audience(s). Since the person who makes decisions about the efficient operation of a multifamily building is often not a resident, it's critical to understand exactly who needs to hear your message.

Decision makers in multifamily buildings may be the building's owner (or, landlord), an on-site property manager, or an off-site association management company, hired by a condominium association to handle tasks associated with management of the common areas of a condominium building or complex. This toolkit will call any of these people or entities "building managers."

And while the occupants of multifamily buildings are typically not making decisions on behalf of the entire building, they can be an important audience as well. Occupants are often able to influence building managers, and they benefit from energy efficiency initiatives both directly and indirectly.



BUILDING MANAGERS

There are plenty of ways to motivate building managers considering energy efficiency initiatives. The benefits that they can enjoy range from the very practical advantages that help their bottom line to more abstract benefits that make their work easier or more satisfying.

BENEFITS FOR BUILDING MANAGERS: PRACTICAL TO ABSTRACT

- **Saving money**
Energy-saving improvements and equipment upgrades can save money on utility bills, including water, energy, and sewage.
- **Less maintenance**
Upgraded energy-efficient equipment throughout your property can mean less time replacing worn out or broken equipment.
- **Increased building value**
Energy improvements and upgrades can enhance the appearance, value, and competitiveness of your property.
- **Happier residents**
Energy improvements and upgrades can enhance resident and common areas and may lead to increased resident comfort, health, satisfaction, and retention.

TENANTS OR CONDO OWNERS

Multifamily building residents can be tremendous allies as your initiative works to influence decision makers. Decision makers know that tenants are their ultimate customer. Tenant advocacy makes it clear to decision makers that the investment they're considering has real advantages that their customers will appreciate, and more importantly, that has value.

The benefits that building managers can enjoy have ripple effects that benefit renters and condo owners alike. And, like building managers, there are both practical and more abstract benefits for tenants as well.



BENEFITS FOR TENANTS: PRACTICAL TO ABSTRACT

- **Saving money**

In buildings structured so that the tenant pays the utility costs for their unit, energy-efficient upgrades offer the fastest route to saving money.

In buildings structured so that utility costs are included in the cost of the rent (e.g., flat fee, ratio utility billing system [RUBS]), lower utility costs may mean that the building manager could offer lower rent.



Ratio utility billing system (RUBS) is a method of allocating shared utility expenses, including electricity, water, and trash collection. Residents are billed on a monthly basis based on *calculated* utility consumption, not actual consumption.

- **Improved lighting**

New LED fixtures use far less wattage, but deliver just as much, if not more, light. Tenants benefit from feeling safer at night when common spaces are more brightly and uniformly lit.

In addition, the harsh light from incandescent or fluorescent lighting is a thing of the past when buildings upgrade to LEDs. LED light can be “tuned” to deliver even, pleasant light, neither as yellow and dim-feeling as incandescent bulbs, nor harsh and over-bright as fluorescent tubes.

- **Less maintenance**

Especially in condominium buildings, upgraded energy-efficiency equipment that costs less to maintain and operate can mean fewer issues for condo owners. Replacement and maintenance of shared equipment is often costly and labor intensive. Energy-efficient solutions offer benefits every condo owner can appreciate.

- **Reduced energy and heated water usage with no effect on comfort**

Whether they pay for their utilities directly or indirectly, most residents look for opportunities to be more sustainable. Energy-efficiency upgrades are often viewed as evidence that the building they live in is well run and conducting itself responsibly. As consumer preference for green alternatives continues to accelerate, energy-efficient buildings will continue to be preferred among tenants.

- **Improved health, comfort, and safety**

The steps that building managers take to improve the energy efficiency of their buildings benefit tenants in observable ways (e.g., the new lighting helps them feel safer) and less distinct ways (e.g., it’s comfortable on hot days, even though the new AC unit uses much less energy).

IDENTIFY MULTIFAMILY PROPERTIES

There are plenty of resources available to help you build a list of multifamily building contacts. There are several ways to identify five or more unit properties in your area — some methods will work better than others depending on available information and resources. Even if you're interested in only targeting tenants, you'll need information on the building manager of the property you want to contact.

RENTAL LICENSING OR INSPECTION RECORDS

Some jurisdictions require rental properties to be licensed or inspected, and those city departments may be able to provide a list of rental properties and owners based on recent records. Contact your city's licensing or inspections department and ask if there are any such requirements in your community. If there are, ask for a list of properties and owners or property managers.

Many licensing and inspections departments have very robust databases and city employees can be very helpful with providing the information you're seeking. Be clear that you need a list of residential rental properties five or more units in size with contact information. The more specifics you provide, the better your chances of getting just what you need.

OTHER CITY DEPARTMENTS

If your city does not have rental licensing or inspections, contact other departments who may interact with multifamily properties, such as housing or planning divisions, fire and safety departments, and utility billing. Your local chamber of commerce may also have records of property management associations.

LOCAL HOUSING AUTHORITIES

Housing authorities manage affordable housing properties. Contact your local housing authority to see if they would be interested in partnering to encourage those properties to participate in Xcel Energy's efficiency and renewable programs.



PROPERTY RECORDS

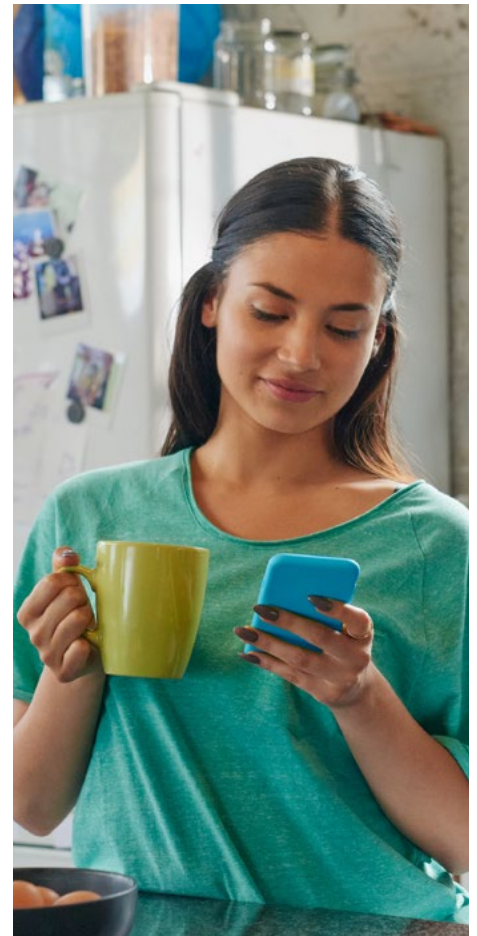
City and county property records are an excellent resource because they often list building owners and contact information. Property records for some jurisdictions are available online. Search for individual property addresses to find details about the owner. If these records are not online, you can visit the city or county assessor office in person for additional support. You may also be able to look up contact information on property websites.

The owner may be an individual or an entity, such as an LLC. It may be possible to meet in person if the owner is local. You could also send the owner a letter through the mail.

ONLINE SEARCH

Find apartments using search engines and online maps. This approach is particularly helpful if you are targeting a specific area within your community.

- Search online using terms such as “property management,” “apartments,” and “apartments for rent.”
- Connect with local property management associations by looking up their contact information on their websites.



HOMEOWNER ASSOCIATIONS

Condo and co-op buildings typically have a homeowner association (HOAs). Partnering with these organizations is a great way to further encourage property managers or owners to participate in the program.

Here are some ways to identify HOAs:

- Check with Energy Action Team members to see if any of them live in condos or co-ops and can provide contact information for their HOA.
- Search online to find condos and co-ops in your city using real estate websites or other sources. You can then use the address to try and find the associated HOA.
- Visit your city or county clerk to see what information they can share about HOAs. HOAs often file codes, covenants, bylaws, or restriction documents and the city or county clerk may be able to provide HOA contact information.
- Download the HOA registration list from the [Colorado Department of Regulatory Agencies](#).
- Use these online tools:
 - » [Association Online](#) can help you find HOAs for a specific address.
 - » [HOA-USA.com](#) maintains a directory of HOAs across the nation.
 - » [All Property Management](#) identifies companies that provide property management services to HOAs and may be able to identify HOAs in your area.

YOUR NETWORK

Leverage your network to see if Energy Action Team members (or their friends or family) know of any local management companies.

If you live in a town with a university or college, ask the school's housing division for a list of off-campus student housing facilities.



DEVELOP YOUR STRATEGY

As you engage property owners, management companies, and tenants of multifamily buildings, it's important to know what you want them to do.

IDENTIFY YOUR DESIRED ACTION(S)

TARGET AUDIENCE: BUILDING MANAGERS

There are three steps that building managers can take to make smart energy efficiency and renewable energy improvements:

1. Get an Energy Assessment

The Multifamily Buildings Program provides a no-cost energy assessment and direct installation of energy-saving products, plus consulting support and incentives for building upgrades that provide long-term energy savings. It's usually the first option to turn to when engaging with multifamily buildings because of its comprehensive, whole-building approach.

Renter- or owner-occupied individual apartment buildings, apartment complexes, condos, and co-ops are eligible for the program if they are an Xcel Energy electric and/or natural gas customer and they have:

- » Five or more units per building
- » Common entrance(s) and common area(s)
- » In-unit kitchens and bathrooms

Assisted living centers may be eligible if each unit has its own kitchen and bathroom. Townhomes, duplexes, and fourplexes do not qualify and should consider [Home Energy Squad®](#). Dormitories and sorority or fraternity properties are not eligible.

How it works:

- **No-cost energy analysis and report:** The program begins with a no-cost whole-building energy assessment performed by an energy advisor. During the assessment, the advisor evaluates how the building consumes energy and identifies opportunities to reduce energy use and save on costs. The energy advisor provides a report outlining those opportunities, including any rebates that are available.
- **Free installation of energy-saving measures:** The direct install technicians will visit for a second appointment (scheduled after the energy analysis) to install energy-saving products in each unit and in the common spaces and leaves behind an energy-savings tips for tenants brochure. The following products may be installed in units:
 - » Energy efficient screw-in LED bulbs
 - » High-efficiency showerheads
 - » High-efficiency faucet aerators (kitchen and bathroom)
- **Consulting support for projects:** The building manager may choose to make additional equipment upgrades. The energy advisor will provide guidance throughout such projects and help submit the necessary paperwork. Examples of projects with potential rebates or bonus incentives include:
 - » High-efficiency lighting
 - » Heating, ventilation, and air conditioning (HVAC) equipment
 - » Water heating
 - » Occupancy sensors and energy management controls



See the [Resources section](#) of this document for more information for getting started.



2. Participate in Renewable Energy Programs

Many building managers have shown interest in renewable energy for their properties, but they often assume on-site wind turbines or solar panels are a costly, unprofitable capital expense.

Xcel Energy offers several programs for building managers to embrace renewable energy, reduce their carbon footprint, and appeal to growing numbers of tenants (both current and prospective) seeking out greener options. These programs offer building managers the option to make on-site capital investments or subscribe to renewable energy programs. Both options allow the building manager to take advantage of using renewable energy for their properties.

See the [Resources section](#) of this document for more information about renewable energy opportunities.

3. Access low-interest financing

The last barrier to making energy efficiency improvements can sometimes be the cost of financing. Building managers often embrace the idea of replacing inefficient equipment, but the realities of paying for the work, even after rebates, can be a big problem. Fortunately, there is a great solution for them. Low-interest financing is available, specially allocated for energy efficiency improvements.

See the [Resources section](#) of this document for more information about renewable energy opportunities

TARGET AUDIENCE: PROPERTY TENANTS

There are four main ways tenants can make energy efficiency and renewable energy improvements:

1. Change behavior

There are relatively simple things tenants can do every day to increase their energy efficiency and savings. See the [Resources section](#) of this document for a list of suggested behavioral changes tenants can make to improve their energy use.

2. Purchase energy efficient equipment

Tenants might not be responsible for purchasing large appliances, but they can purchase other ENERGY STAR®-certified electronics and appliances, including microwaves, phones, TVs, and computers. See the [Resources section](#) of this document for flyers that promote efficient equipment.

3. Participate in eligible programs

Xcel Energy offers several home energy programs for tenants to embrace efficiency and reduce their carbon footprint. See the [Resources section](#) of this document for more information about the following opportunities:

- Energy efficiency programs
- Renewable energy subscription programs
- Income-qualified programs

Note: To be eligible, the tenant must be the account holder with Xcel Energy.

4. Be an “Energy Ally”

Building managers can be motivated to invest in energy efficiency projects when they know that their tenants will value the investment. Tenants can contact their building manager to ask about the building being greener or the lighting being safer. The contact doesn't have to be confrontational or unpleasant, but when enough tenants band together on such issues, good things can happen.

See the [Resources section](#) of this document for tools to be an energy ally.



UNDERSTAND THE BENEFITS OF YOUR DESIRED ACTION(S)

Regardless of the strategies you choose to pursue, you should understand the benefits associated with each action your target audience might take. Below is a list of some common benefits from increased energy efficiency and renewable energy. Be sure to customize your approach to focus on one or two benefits your target audience values the most. Common benefits include:

- Saving money
- Improved indoor comfort
- Healthier, cleaner air
- Increased property value
- Reduced greenhouse gas emissions and lower carbon footprint
- Improved renter retention
- Reduced maintenance costs

CHOOSE YOUR COMMUNICATION METHOD

It is extremely important to choose your communication methods and frequency carefully. Consider the following questions when making your selections:

- Talk to a few building managers early to find out which type of communication options exist and which they prefer.
 - » Is there a professional association of building managers who hold periodic meetings in your community?
 - » Is there a newsletter or mailing list?
 - » What communication methods does the target audience prefer (email, phone calls, drop-in visits)?
- Focus your interaction on a simple message. And focus on something you want the target audience to do, not something you want the audience to know.
- Any prospective customer or client needs to be exposed to a message many times before they'll take notice or action (Ballantine, 2018).
 - » Keep this in mind when you choosing your communication method and build in redundancies to reach your audience in multiple ways.
 - » It's also important to remember this idea during the early stages of your initiative. People can become discouraged by lack of response long before their prospects have even noticed their outreach.

INTEGRATE INFORMATION INTO CITY PROCESSES

Integrating information into city processes can be an effective way to reach this target audience. Using the city's existing points of contact with the public, you can easily add information about the action(s) you wish your audience(s) to take.

It's important to understand how your target audience interacts with the city to ensure that such a message is effective. Ask different city divisions and departments how they communicate with your target audience.

Try these ideas for integrating your message into an existing city process:

- **Rental licensing:** If your city requires licensing for rental properties, you can add a flyer to the application or renewal process that promotes your desired action. To guarantee that you reach your target audience, make sure you understand who typically files a license application.
- **Fire or permit inspections:** Does your city inspections division regularly examine properties? If so, when and why do they complete inspections? Determine whether there is an opportunity to include a flyer, door hanger, or other marketing collateral with the inspection materials given to the property tenant or owner.
- **Assessing valuations:** Does your city or county assessor visit properties to complete an annual valuation? If so, they could leave a door hanger or flyer.
- **Public safety initiatives:** Does your public safety team have an initiative specific to your target audience (e.g., rental coalition)? If so, they could be an avenue to share information through their existing points of contact.
- **Permitting process:** Add relevant information on pursuing energy efficiency and renewable energy through property renovations to permit applications and other applicant materials. Websites, updates to the permit applications, and regular interactions can promote your desired action(s) with building owners and property managers.



LEVERAGE OUTREACH CHANNELS

Engaging your target audience may require a combination of outreach methods. Use the property lists and contact information you gathered in [Step 2](#) to help you determine the best outreach channels.

When you use such outreach channels, the best way to encourage your audience to participate is clearly communicating the benefits of energy efficiency and renewable energy. Identify the simple actions and behavior changes that renters and owners can take and plainly connect them to their associated benefits. See the communications plan templates in the [Resources section](#) of this document for support.

CALL DIRECTLY

Direct calls are one of the quickest ways to gauge interest, and they are a good option when you have limited resources or a small number of contacts.



<i>Introduction</i>	"Hello — My name is [name] and I'm calling on behalf of [City]."
<i>Confirm Decision-Maker Status</i>	<p>"Are you the building manager of the building at [address]?"</p> <p>[If yes] "Great!" [Move to Provide Background]</p> <p>[If no] "Who should I contact about some new energy efficiency opportunities we're working on for buildings like this one?" [Express thanks for information and ask to be transferred or for contact info.]</p>
<i>Provide Background</i>	<p>"Larger multifamily properties like yours are the focus of a new outreach program that we're supporting since there's usually a significant opportunity to lower costs and improve efficiency. We're finding that building managers in [City] have been pretty enthusiastic about this initiative. They're lowering operating costs and delivering some quality of life improvements to their tenants as well.</p> <p>Does this sound like something that could benefit your building?"</p> <p>[If yes, move to Confirm Info and Next Steps]</p> <p>[If less than yes (e.g., not interested, no time to talk, etc.): move to Handle Objections]</p>
<i>Handle Objections</i>	<p>"Could you help me understand? What's the biggest reason you're not interested?"</p> <p>[Listen carefully.]</p> <p>"I understand. There may be benefits to programs like this, but you're concerned that [repeat objection (e.g., they can be a lot of extra work.)]"</p> <p>[If yes, move to Rephrase. Isolate. Get a yes.]</p> <p>[If yes and another objection(s), circle back to rephrase "I understand" and summarize objection(s).] "I get it, even though it's an interesting program, you're concerned about [repeat objection (e.g., extra work and annoying your tenants)]"</p> <p>[If yes, move to Rephrase. Isolate. Get a yes.]</p> <p>[If no, or if there's a negative change in tone: express gratitude and terminate call.]</p>
<i>Rephrase. Isolate. Get a yes.</i>	<p>"Great. If I could make sure that you could take advantage of the program without [objection(S)], would there be any reason not to move ahead?"</p> <p>[If no] "That's good news! We have advisors on the team who can explain how to address your concerns, and while you still take advantage of all of the benefits of this free program." [Move to Confirm Info and Next Steps.]</p> <p>[If yes] "Could you tell me more about your situation? We're anxious to help, and I bet we could find something just right for you."</p> <p>[If no, or if there's a negative change in tone, express gratitude and terminate call.]</p> <p>[If yes, go back to Handle Objections]</p>
<i>Confirm Info and Next Steps</i>	<p>"I'll be happy to pass along your information to the right people so that they can answer any questions you may have and get you scheduled for an energy analysis."</p> <p>"Is this the best number to reach you?"</p> <p>[If yes, thank the customer and reassure them that they'll be hearing from someone in [agreed upon follow up time] to get started. Offer your contact info in return so that the customer can contact you with follow up questions.]</p> <p>[If no, record best contact info. Then thank them, explain next contact, and offer your contact info.]</p>

SEND AN EMAIL

Like calling, emailing is an efficient method of outreach that requires few time and financial resources. However, unlike calling, emails do not elicit an immediate response; therefore, this method is best for when you have a larger number of contacts.

Sample Email

Subject: Multifamily buildings program to help you save money

*Hello,
I'm writing to tell you about a program that can lower energy costs in buildings like yours.*

[CITY] is supporting a new initiative designed to offer energy saving services targeted to the needs professionals managing multifamily buildings like yours.

All you need to do is call me at [NUMBER] or reply to this email and you'll be on your way to lowering your operating costs and making your tenants a lot more comfortable.

Building managers all over [CITY] are starting to see the benefits of this program. It's an outgrowth of the [CITY]'s Energy Action Plan and it's designed especially for larger multifamily properties.

Getting started is easy — just call me at [NUMBER] or reply to this email.

*We look forward to helping you get the most out of this great program.
Sincerely,*

*[Name]
[CITY] Energy Action Team*

IN-PERSON OUTREACH

Phone calls and emails are easy outreach activities but may not be enough to motivate building managers to action. Direct, in-person outreach takes more time but may be more effective in connecting with decision-makers. Visit the property office (e.g., management or association office) and ask to speak with whoever manages the property, specifically with regard to electricity and gas. Leave an informational flyer and an application with them, and then follow up in a few days to answer questions and gauge their interest.

See the [Resources section](#) of this document for in-person outreach materials.

HOLD A WORKSHOP OR INFORMATION EVENT

If you know of a group of building managers, a workshop or information event may be the best way to engage with them. For example, presenting at a property management association meeting is a great way to inform property managers about the program, build trust, and get additional contact information.

See the [Resources section](#) of this document for a sample slideshow and other materials that may be helpful for hosting a workshop or information event.

COORDINATE AND EXECUTE STRATEGY

Take advantage of existing resources to make your strategy as effective as possible. This includes coordinating efforts with stakeholders and partners, co-branding where possible, and cross-promoting to interested parties. Make use of the information you learned about your target audience through Step 1. Focus on providing information where and how your audience typically receives it.



Cross-Promotion targets customers of one product or service with promotion of a related product or service.

COORDINATE STAKEHOLDERS AND PARTNERS

Community stakeholders and partners (including those from your Energy Action Team) are essential resources for executing your strategy. These stakeholders and partners may have community connections that can support your efforts and they can also share the workload of implementing your strategy.

DEVELOP CO-BRANDED MATERIALS

Co-branding materials is an effective way to add legitimacy to your outreach campaign. In general, your target audience is more likely to read a mailing from an organization they already trust. They may also be more likely to follow through with the action(s) you wish them to take if the message comes from more than one messenger.

This toolkit includes many potential outreach materials in the [Resources section](#). If you would like to brand these materials to your community or add co-branding, contact your community facilitator.

CROSS-PROMOTE WITH OTHER PROGRAMS AND INITIATIVES

Are there existing programs or initiatives in your community that you could partner with to cross-promote messages? Existing programs and initiatives have already built momentum that you can use to help reach your target audience. Additionally, tenants and owners who have already engaged in other ways are more likely to pursue additional energy efficiency and renewable energy opportunities. Whenever possible, focus your efforts on these cross-promotion opportunities.



LEVERAGE FINANCIAL AND HUMAN RESOURCES

Executing your strategy is probably going to be both time and cost intensive. Whenever possible, try to share the workload and costs with other stakeholders and leverage existing financial resources (e.g., printing costs, event fees). For example, if you plan to table at an event, share the workload across different shifts of volunteers or rotate responsibilities across multiple events.

STEP
05

TRACK AND SHARE SUCCESS

As you execute your strategy, you should track the success of your different outreach methods.

MONITOR POINTS OF CONTACT

Points of contact can be a powerful metric to measure your impact on awareness and education. Tracking the number of views or engagements on a social media post, the number of phone calls made, the number of postcards mailed, and the number of events tabled can help you track how many impressions you've made.

TRACK ENROLLMENT IN PROGRAMS

If you are promoting specific programs, establish a participation baseline so you can track the impact of your strategies. Ask your Partners in Energy community facilitator for help with establishing your participation baseline. You may have access to special data reports during your strategy implementation to gather real-time data.



TERM
CHECK

A **baseline** is the initial collection of data, which serves as a basis for future comparison. A baseline can be set over a period of time (e.g., three-year baseline) or at a specific point in time.

COLLECT TESTIMONIALS

Ask tenants and owners to share their experience as or after they follow your desired action(s). Their positive experiences can motivate others to participate through social norming. Their stories can be shared through your future outreach materials.

REPORT IMPACT

Share the impact of your strategy — the points of contact, participation rates, and testimonials — with your stakeholders and partners. A presentation to your city council, a community report, or a feature in the local newspaper will garner additional support for future outreach campaigns and may also continue to promote your desired action(s) with relevant audiences.

RESOURCES

GENERAL RESOURCES

EVENT PLANNING WORKSHEET

MORE INFORMATION SIGN-UP SHEET

REPORT & PRESENTATION TEMPLATE

STRATEGY AND OUTREACH PLAN TEMPLATE

See following pages.

STRATEGY & OUTREACH PLAN

The purpose of a Strategy and Outreach Plan is to support the [target audience] and provide organized strategy development and communications for multifamily (5+ units) properties over the next [timeline].

STRATEGY SCOPE & OBJECTIVES

(What is your objective in reaching multifamily (5+ units) properties? What activities will need to be implemented to achieve your goals? Clearly identify what you are trying to achieve with this strategy.)

TARGET AUDIENCE

(Reference Step 1 of the multifamily (5+ units) toolkit for support identifying target audiences within multifamily (5+ units) properties. Be as specific as possible.)

BARRIERS

(What might get in the way of achieving your objectives? Be as specific as possible.)

KEY MESSAGES

(What information is essential to share with your target audience? These messages should help achieve your objectives and reduce the impact of identified barriers.)

RESOURCES/COMMUNICATION CHANNELS

(What communication channels does the target audience use? What communication channels do you have access to?)

PROGRAM DESCRIPTIONS



ENERGY EFFICIENCY PROGRAMS

MULTIFAMILY BUILDINGS PROGRAM

This no-cost program provides services plus incentives for making energy equipment upgrades. In addition to a no-cost energy analysis and installs, participants can earn rebates for individual improvements, in addition to bonus incentives.

Use this checklist to see if the buildings you're reaching out to qualify:

Does the building have ...

- Five or more units per building?
- Common entrance(s) and common area(s)?
- In-unit kitchens and bathrooms?

Who supplies the building's energy? Is the building ...

- An Xcel Energy electric and/or gas customer?

If all these descriptors apply to the building, it qualifies for the Multifamily Buildings Program.

Contact: [xcelenergy.com/Multifamily](https://www.xcelenergy.com/Multifamily)

LIGHTING EFFICIENCY

Save money with lighting efficiency improvements. When you make the switch to energy-efficient lighting, it can drive long-term energy and cost savings. Lighting rebates can help you lower your up-front costs and speed up the payback on a wide range of lighting efficiency improvement projects, including LED upgrades.

Contact: [xcelenergy.com/LightingEfficiency](https://www.xcelenergy.com/LightingEfficiency)

COOLING EFFICIENCY

Taking steps to upgrade or improve the efficiency of your cooling equipment can help you gain year-over-year energy and cost savings. Whether you want to upgrade your entire cooling system or just specific components, cooling rebates can help lower your up-front costs and speed up the payback period of your energy-saving project.

Contact: [xcelenergy.com/Cooling](https://www.xcelenergy.com/Cooling)

HEATING EFFICIENCY

Reduce energy spending during the heating season through equipment upgrades. Energy efficiency improvements can provide long-term savings and rebates that can cover up to 60% of up-front costs. They can shorten your payback to an average of three years depending on the equipment installed.

Contact: xcelenergy.com/HeatingEfficiency

ENERGY MANAGEMENT SYSTEMS

If you don't have automated building controls in place at your commercial facility, you could be wasting resources. Xcel Energy offers rebates for new and improved energy management systems.

Contact: xcelenergy.com/EMS



RENEWABLE ENERGY PROGRAMS

WINDSOURCE®

Windsorce is a voluntary subscription program that allows business or residential customers to source some or all of their electricity from locally produced wind energy. Windsorce subscriptions are available in 100 kilowatt-hour (kWh) blocks for a small additional premium of \$3.53 per block, less a credit for fuel costs. In 2019, the net Windsorce premium for Commercial and Industrial non-demand customers was \$0.98 per 100 kWh block (\$0.0098 per kWh).

For tenants, cost ranges from \$1 to \$10 per month, depending on subscription amount and customer's home electricity use. This program is available to both owners and renters, as long as the electricity bill is in their name.

Contact: xcelenergy.com/Windsorce 1-800-895-4999

SOLAR*REWARDS®

Solar*Rewards® is your opportunity to power your buildings with solar power you produce and get credit for participating. It's an incentivized program, so monthly payments are made to the owner of the solar power generation system in exchange for Renewable Energy Credits for the energy produced by the solar power generation system.

If you produce more than you need, the extra energy is added to our grid, and any excess energy will be credited to your bill.

Contact: xcelenergy.com/BusinessRenewables

SOLAR*REWARDS COMMUNITY

Solar*Rewards Community is a subscription program that allows customers the opportunity to support the development of nearby solar gardens without the hassle of installing panels on their residence or business. Once subscribed to an active garden through the developer, customers will receive credits on their monthly Xcel Energy bill equivalent to the solar energy that their subscription contributes to the Xcel Energy grid.

Contact: xcelenergy.com/BusinessRenewables



REBATES FOR EQUIPMENT

Customers can save when they install high-efficiency equipment, replace inefficient appliances, enroll in efficiency rate programs, and change the way they use their appliances. There are rebates for heating and cooling equipment, water heaters, and insulation.

Contact: xcelenergy.com/Business



LOW-INTEREST FINANCING

CITY OR COUNTY FINANCING

Many cities and counties offer financing for home improvements, including energy-related improvements. Contact your city and county to see what types of financing programs are available.

PACE

Property-Assessed Clean Energy (PACE) is a way to finance energy efficiency and renewable energy projects for new or existing buildings of multifamily property owners. Energy-saving projects done by the property owners receive PACE financing and are repaid as a separate item on their property tax assessment for a set period.

PACE financing helps overcome barriers to doing energy-related projects. It eliminates high up-front costs, reduces dependence on credit, and allows for comprehensive projects.

Contact: copace.com

FLYER EXAMPLES

RENTERS ENERGY GUIDE (FOR TENANTS)

BOOST YOUR ROI WITH ENERGY IMPROVEMENTS (FOR BUILDING MANAGERS)

KEEP VALUES HIGH WITH ENERGY EFFICIENCY (FOR HOMEOWNERS ASSOCIATIONS)

RENTER'S ENERGY GUIDE

Tips to help you save on your energy bill

1

MANAGE YOUR TEMPERATURE

You can save as much as 10% a year on heating and cooling by simply turning your thermostat back 7°–10°F for eight hours a day from its normal setting.¹ Consider investing in a smart thermostat to control your thermostat from a mobile device.

Bonus: Visit xcelenergyStore.com to receive an instant rebate on your new smart thermostat.

¹ Source: <https://www.energy.gov/energysaver/thermostats>



2

LIVEN UP YOUR LIGHTING

Visit xcelenergy.com/LightingDeals to find participating stores which offer Xcel Energy discounts of up to \$3 on select LED bulbs. LED lights typically use 70% to 90% less energy and last at least 15 times longer than the traditional incandescent bulbs they replace.²

² Source: EnergyStar.gov https://www.energystar.gov/products/lighting_fans/light_bulbs



3

UNPLUG YOUR LOAD

TVs, cable boxes, and computer chargers will use electricity, even when turned off!

- Attach electronics to a power strip to easily turn them off when not in use.
- Unplug cell phone and computer chargers when not in use.



[Community Logo]

 **Xcel Energy**[®]
PARTNERS IN ENERGY
An Xcel Energy Community Collaboration

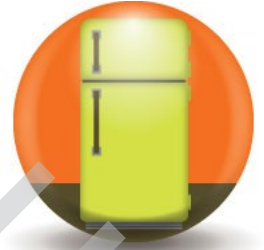
CONTACT YOUR PARTNERS IN ENERGY FACILITATOR FOR CUSTOMIZATION OF THIS TEMPLATE

4

PURCHASE ENERGY STAR® ELECTRONICS AND APPLIANCES

A wide range of energy efficient electronics and appliances are available to save energy and money when operating devices. Popular ENERGY STAR-rated products include computers, televisions, DVD players, air conditioners, dehumidifiers, and more.

To know an electronic device's or appliance's rating, look for the yellow Energy Guide sticker when shopping. Visit www.energystar.gov/products for a full list of rated products.



5

REDUCE HOT WATER WASTE

Hot water use can be a big culprit of year-round high energy bills. Try three tips to save money on your water heating bill:

- Switch to high-efficiency showerheads and faucet aerators to cut down on hot water waste.
- Wash your clothes in cold water whenever possible.
- If accessible, adjust the temperature on your hot water heater to a lower setting.



6

ENCOURAGE YOUR LANDLORD TO GET AN ENERGY ASSESSMENT

A energy assessment is a great way for your landlord to identify energy saving opportunities in their rental property and to help tenants save money on energy bills.

Ask your landlord to sign up for the Multifamily Building Program to receive a whole building energy assessment. During the assessment, energy experts will help determine the best approach to energy savings, install energy- and cost-saving measures, and how you can earn rebates and bonus incentives. Learn more by visiting xcelenergy.com/multifamily.



[Community Logo]



PARTNERS IN ENERGY
An Xcel Energy Community Collaboration

BOOST YOUR ROI WITH ENERGY IMPROVEMENTS

Follow these easy steps to boost your property's value, reduce operating costs, and improve tenant satisfaction.

1

GET AN ENERGY ASSESSMENT

Take advantage of energy savings for you and your tenants through our Multifamily Buildings Program. Not only will participating help keep your tenants satisfied, but you'll also add value to your property!

Visit xcelenergy.com/multifamily to learn more.



2

CUT UPFRONT COSTS

Need to upgrade aging equipment or appliances? From furnaces to refrigerators, Xcel Energy offers rebates to keep upfront costs low.

And with new energy efficiency equipment, operating costs will stay low, even during the coldest months.

Visit xcelenergy.com/HomeRebates to learn more.



3

COMPLETE SMALL DIY UPGRADES

From thermostats to ceiling fans, small upgrades can improve your property's appeal and help make your tenants feel more comfortable.

- Install programmable or smart thermostats
- Upgrade showerheads and install faucet aerators for natural gas savings
- Add ceiling fans to help control cooling
- Install energy-efficient window treatments
- Regularly assist or remind tenants to change air filters



Need help?

If you don't know where to start or want to ask more questions, call an energy efficiency specialist at **1-800-481-4700**.



PARTNERS IN ENERGY
An Xcel Energy Community Collaboration

CONTACT YOUR PARTNERS IN ENERGY FACILITATOR FOR CUSTOMIZATION OF THIS TEMPLATE

KEEP VALUES HIGH WITH ENERGY EFFICIENCY

HOAs can help members keep property values and comfort high with energy efficiency

1

ENCOURAGE YOUR PROPERTY MANAGER TO GET AN ENERGY ASSESSMENT

A energy assessment is a great way for your building to identify energy saving opportunities in their rental property and to help tenants save money on energy bills.

Ask your property manager to sign up for the Multifamily Buildings Program to receive a whole building energy assessment. During the assessment, energy experts will help determine the best approach to energy savings and install energy- and cost-savings measures.

Visit xcelenergy.com/multifamily to learn more.



2

TRACK CONSUMPTION THROUGH BENCHMARKING

Wasted energy and water in common areas can keep HOA costs high. Track where your money is going with ENERGY STAR® Portfolio Manager®. Make improvements as you learn what common areas are using the most energy and water.

Visit energystar.gov/PortfolioManager to get started.



3

BE A RESOURCE FOR MEMBERS

Host campaigns, educational events, and share tips on how residents can save energy and money. These upgrades can keep values high and ensure all residents are staying comfortable.

- Upgrading appliances? You can get money back on a variety of home appliances.
- Need a new furnace or air conditioner? Stay comfortable and get cash back when you upgrade your equipment.
- Go green with renewable solar or wind energy subscriptions.

Visit xcelenergy.com/HomeRebates to find all the ways HOA residents can save.



[Community Logo]

 **Xcel Energy**[®]
PARTNERS IN ENERGY
An Xcel Energy Community Collaboration

CONTACT YOUR PARTNERS IN ENERGY FACILITATOR FOR CUSTOMIZATION OF THIS TEMPLATE

WORKS CITED

Ballantine. (2018, September 24). Understanding the Marketing Rule of 7. Retrieved from Ballantine.com: <https://www.ballantine.com/understanding-the-marketing-rule-of-7/>

U.S. Census Bureau. (2013–2017). 2013–2017 American Community Survey 5-Year Estimates. Retrieved from Factfinder: <https://factfinder.census.gov/faces/nav/jsf/pages/index.xhtml>

