

## Measuring Success of HELP Enhancements

### INTRODUCTION

This appendix provides a summary of the performance of the Home Energy Loan Program (HELP) enhancements. It outlines how we are measuring success through key performance indicators (KPIs), tracks performance to the end of 2023, and provides suggestions on how to mitigate performance challenges.

### WHAT YOU NEED TO KNOW

- The HELP enhancements are a suite of education tools and services that have been developed and implemented using grant funding from the Federation of Canadian Municipalities (FCM). They were launched throughout 2023 with one additional program planned to launch in 2024. The programs will continue until the beginning of 2026 when FCM funds will run out.
- Using a variety of key performance indicators, the programs have been evaluated and given an overall rating of *exceeding*, *on-track*, or *not meeting*, as follows:

*Table 1: Summary of HELP Enhancements Evaluation*

Program	Status
Residential Solar Potential Map	<i>On-track</i>
Energy Coaching Service	<i>Not meeting</i>
Home Energy Map	<i>TBD</i>
Real Estate Agent Training	<i>On-track</i>
Renovation Education Events Team	<i>TBD (not started)</i>
Canadian Home Builders Association Partnership	<i>On-track</i>

- The Energy Coaching Service, which is not meeting expectations, has the following mitigation plans in place to improve performance:
  - Increased performance monitoring of the vendor including monthly meetings to discuss performance, spot checks, and quarterly performance reports; and
  - Increased promotion and updated communications tactics.
- A multi-faceted communications campaign took place in 2023 to build awareness of energy efficiency options for residential homes and promote the new tools and services mentioned above. Communications will be continued in 2024 to further improve uptake of the tools.

### PERFORMANCE TRACKING

Each enhancement has its own set of objectives, typically established through the contract with the vendor, with key performance indicators used to monitor the objective, track overall program success, and look for ways to improve the program. Based on the indicators, the objectives are given a rating of *exceeding*, *on-track*, or *not meeting*; in many cases, ideas for improvement are provided.

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### Residential Solar Potential Map

The Residential Solar Potential Map is a self-service tool that helps residents explore the financial and environmental benefits of using rooftop solar on their home. It was launched in March 2023.

Table 2: Residential Solar Potential Map Evaluation

Objective	KPIs	Performance to the end of 2023	Evaluation	Mitigation plan if required
Drive user uptake for the map	12,000+ total Saskatoon residents engaged in solar map over 4 years.	13,287 unique users visited the site from March-December 2023. 65.4% (8,690) of these were in Saskatoon.	Exceeding	
Drive user uptake on the calls to action links	6,400+ clicks to call to action links on the map over 4 years.	4,113 clicks to calls to action from March-December 2023. Most popular link clicked was Canada Greener Homes Grant, followed by contractor quote template.	On-track	
To increase fact-based understanding of solar power and decrease myth-based objections, leading to broader community understanding of the technology.	TBD	Not being measured.	NA	See measurement ideas below
Increase the number of rooftop solar installations in Saskatoon.	Increase new solar installations from 164 in 2022 to 300 by 2026	107 new installations in 2023 including: 59 SL&P & 48 in SaskPower.	Not meeting	Increase promotion of solar tools and financing options through in-person events, related programming and other communications tactics

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The project team will add the following data collection activities to improve monitoring on the success of the Solar Potential Map:

- Monitor correlation between communications tactics used and user uptake and change communications tactics for the solar map if necessary.
- Request solar installation map images from SL&P and SaskPower service areas for each year and match these images to a vendor provided postal code level map to see if there is any correlation between solar map usage and solar installations.
- Through 2024 educational events, hold a short quiz to collect baseline understanding of solar in the community, to understand whether it is changing.

### Energy Coaching Service

The Energy Coaching Service provides free telephone, email or in-person energy coaching to help residents determine which energy efficiency home upgrades will benefit them the most, how to reduce their energy consumption through day-to-day behaviours, and how to apply for various financial incentives that will help them pay for their upgrades. It was launched in March 2023.

Table 3: Energy Coaching Service Evaluation

Objective	KPIs	Performance to the end of 2023	Evaluation	Mitigation plan if required
Drive residents to use Coaching Service	Based on vendor proposal: -120 virtual home walkthroughs per year -108 in-person home walkthroughs a year. -26,400 call minutes per year	11 walkthroughs (virtual/in-person) 215 calls (592 min) Total Emails: 126	Not meeting	Increase promotion
Vendor provides a high quality of service	Participant satisfaction with coaching (measured through surveys)  Calls/emails returned by the next business day  Wait times – no target set	1 survey completed in 2023: “very satisfied” 3 documented unreturned calls (from resident complaints or City staff calling)  Avg wait time for calls: 2.4 min	Not meeting	Increased performance monitoring of the vendor including monthly meetings to discuss performance, spot checks, and quarterly performance reports.

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The project team will continue to monitor program uptake on a monthly basis with reporting from the vendor and monitor program quality on an ongoing basis. The following considerations are being pursued in 2024:

- Set a 2024 target for calls and emails to increase volume by 25% compared to 2023 baseline.
- Request that the vendor send reminders for more homeowners to do surveys, especially after they have had a home walkthrough completed, and that surveys are conducted on with participant y on the spot before energy coach leaves home.

#### Home Energy Map

The Home Energy Map is a self-service tool to provide homeowners with a digital energy score for their home, as well as home upgrade suggestions based on the age and building type of the home. The tool allows homeowners to add actual upgrades completed on the home to the website to improve the home's digital energy score. This tool was launched in October 2023.

Table 4: Home Energy Map Evaluation

Objective	KPIs	Performance to the end of 2023	Evaluation	Mitigation plan if required
Drive user uptake for the map	TBD for 2024 - number and types of Saskatoon data requests per month	Total unique views: 12,101	TBD	Continue promotion of map through marketing tactics
To promote other tools/services	TBD - link clicks for other programming or rebate offers per month	Link clicks on energy coaching service from map webpage: 48	TBD	Try different links to cross promote. For eg. Solar map may be more appealing to people using this map than the coaching service
Maximize the number of users who have viewed retrofit roadmaps	TBD - Total number of users for payback/cost tool per month	Homes claimed (user accounts created) on the map: 639	TBD	Attempt more targeted communications approach, focused on creating an account on the map/the value of the retrofit roadmap instead of just "try the map"

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The project team will continue to monitor program uptake on a quarterly basis with reporting from the vendor and monitor program quality on an ongoing basis. 2024 targets will be set using 2023 baselines, including:

- Maintain unique views year-over-year
- Double conversion rate for creating an account and viewing their retrofit roadmap to 10% of unique views
- Increase number of clicks on calls to action (rebates, other programs/tools) to 10% of unique views

### Real Estate Agent Training

The Real Estate Agent Training Program includes workshops offered to real estate agents across Saskatoon and Saskatchewan helping to build knowledge about the benefits of energy-efficient features and help increase demand for energy-efficient homes. The first workshop took place in November 2023.

Objective	KPIs	Performance to the end of 2023	Evaluation	Mitigation or continuous improvement
Maximize total number of attendees for each training event (virtual and in person)	300 real estate agents attend training in Saskatchewan over 2 years	54 registrants attended in 2023: Session #1 – 34 Session #2 – 20	Not meeting – Need at least 37 to attend each session to reach 300 in 8 sessions	Increase promotion of training for next event, targeted promotion of next event to Real Estate Brokerages
Maximize number of workshops during contract	Number of training events per year	2023: 1 Event 2024: 4 Events 2025: 3 Events	On-track	
Quality of program/value of training from attendee perspective	Attendee satisfaction with training sessions (measured through post-session surveys)	Survey feedback from first two sessions very positive.  Session #1: 81% said they were either satisfied or very satisfied with the training overall  Session #2: 100% said they were either satisfied or very satisfied with the training overall	Exceeding	Review feedback after each training session through debriefs of and make adjustments as necessary

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In 2023, there were 37 no-shows for the in-person event and 21 no-shows for the virtual option. To mitigate this, a small registration fee will be charged for in-person attendance.

### Renovation Education Events Team

The Renovation Education Events Team is expected to launch in March 2024. Throughout 2024 this team will attend public events in person to connect with the public and build awareness for energy efficiency behaviours at home, energy efficient home renovations and promote related City services and tools such as the Solar Potential Map, the Home Energy Map, Energy Coaching Services and Real Estate Agent Training program.

Objective	KPIs	Performance to the end of 2023	Evaluation	Mitigation plan if required
Maximize the number of events attended	Target to attend at least 10 events in one-year contract	TBD	TBD	PM to review list of events vendor registers for throughout contract; add events if needed
Resident interest in the topics/booth	The number of participants visiting the booth.	TBD	TBD	Adjust booth materials if needed
Quality of program	Qualitative feedback including: inquiries that were unresolved, or required escalation to City staff; public response to the booth, interesting stories or feedback, or complaints.	TBD	TBD	PM review reporting after each event, monitor for any trends

The project team will regularly monitor program quality, resident interest, and the events statistics after each in-person event through debriefs of the event and review of vendor reporting after each event. Adjustments to the event materials will be made if necessary.

### Canadian Home Builders Association Partnership

The Canadian Home Builders Association (CHBA) Partnership was established in 2022 and exists to increase local capacity by training local contractors and renovators, along with Energy Advisors to renovate homes to Net Zero or Net Zero Ready.

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In November 2022, the CHBA hosted an advanced building science course for 16 attendees and a two-day Net Zero Reno Bootcamp for 54 attendees in Saskatoon. Another advanced building science course was hosted in Saskatoon in January 2023 for 10 attendees. Additional building science and net zero bootcamps were hosted in late 2023 in Regina.

The City's role in this project is to identify HELP participants that are interested in a Net Zero or Net Zero Ready renovation and connect them with the CHBA project. The City provides a \$10,000 rebate to HELP participants that complete a Net Zero or Net Zero Ready renovation through this project.

No grant funding is allocated to the CHBA, as the contributions to this partnership are in-kind staff time only.

Objective	KPIs	Performance to the end of 2023	Evaluation	Mitigation plan if required
Increase the number of single-family net zero renovations	5-10 single-family homes in Saskatoon to net zero/net zero ready through CHBA Program	7 homes (all HELP participants) enrolled for CHBA program and targeting net zero/net zero ready renovation at the end of 2023.	On-track	

The project team will continue promotion of the CHBA program to HELP participants that have not completed projects.

### Communications Campaign

A multi-faceted communications campaign took place in 2023 to build awareness of energy efficiency options for residential homes, myth-bust common misconceptions about innovative technologies, and promote the new tools and services mentioned above. In alignment with this campaign administration launched a new webpage [Saskatoon.ca/RenoResources](https://Saskatoon.ca/RenoResources) to compile all the financing and education tools available to residents. Another robust communications campaign to continue promotion of energy efficiency tools and resources is planned for 2024.

The success of the marketing campaigns are, in part, measured by how successful the HELP enhancements themselves are, as reported in the sections above. These goals and KPIs are reviewed annually by the project team to correlate marketing activities with spikes in traffic on the Solar Map and Energy Map and ensure that calls to action (CTA) are effective. (As examples, CTA are action focused, compelling the audience to "Check the map" or "Claim your home!")

Whenever a campaign is outsourced to a media company (in 2023 we worked with CTV, Global News, and the StarPhoenix), the outlet provides a full campaign report on

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number of clicks, downloads, or other calls to action (CTA). Based on these metrics, the Marketing Consultant can determine if the campaign was successful and whether to employ this tactic again. Advertorials (paid articles that are styled like news articles) have been especially effective in program launches with high traffic CTAs and page views. Advertorials also ensure that programs are explained in accurate detail and that programs “make the news” even if the press release goes unnoticed.

The Marketing Consultant provides external contractors with dates for big media pushes so they can assist in attributing City tactics with an increase in traffic on their site.