

Title: Broker Training Final Report and Supporting Materials

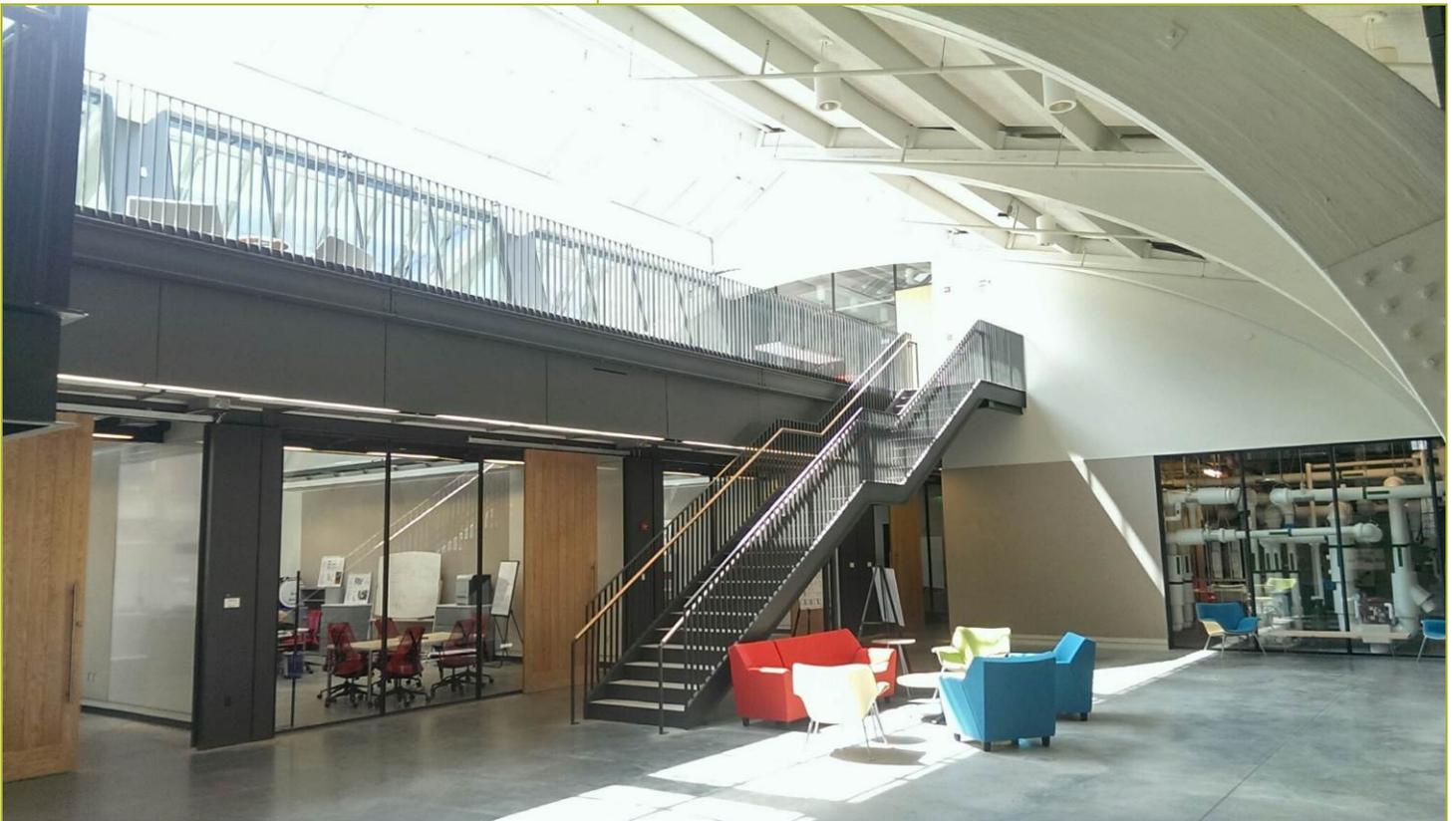
Final Report – Task 4.5

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Report Abstract

The objective of the broker training project was to improve the demand and uptake for energy-efficiency measures by educating commercial brokers. This report summarizes the project's BP5 achievements. In BP4, the project team created a training course, established continuing education credit for that course, and conducted training in Philadelphia. Building on BP4 work, in BP5 the project team extended the reach of the broker training program outside of Philadelphia, performing research on CE requirements and approved providers nationwide, enlisted the help of additional partners, performed outreach to both local providers and national market partners, and sought commitments from major national players.

Name (Task, project, milestone)	Start date	Finish date	
Research and report on providers and requirements for 15 states	5/1/2015	7/30/2015	√
Hold kickoff meeting with CBEI	5/9/2015	5/9/2015	√
Research state requirements for CE and CE providers	5/1/2015	6/20/2015	√
Research and deployment plan to provide CE in 15+ states delivered	7/10/2015	7/30/2015	√
Engage states to make energy efficiency education part of mandatory CE	7/1/2015	12/31/2015	√
Determine which states have the potential to make EE CE mandatory	7/1/2015	7/30/2015	√
Initial outreach to states about requiring continuing education completed	7/16/2015	9/30/2015	√
Follow up on outreach as needed	7/30/2015	12/31/2015	√
Identify and engage continuing education providers to deliver course	6/1/2015	4/1/2016	√
Perform outreach to CE providers covering 10+ states	6/1/2015	12/31/2015	√
10+ instructors engaged as potential deployment partners	6/1/2015	12/31/2015	√
Provide course materials and establish "train the trainer" system	1/1/2016	4/1/2016	√
Conduct trainings	6/1/2015	4/1/2016	√
Engage market partners to set up trainings	5/1/2015	2/1/2016	√
Edit course materials as necessary	5/1/2015	4/1/2016	√
Provide additional trainings in PA	6/1/2015	3/1/2016	√
Course approved for continuing education in a state(s) outside PA	6/1/2015	10/31/2015	√
Deliver training in a state other than Pennsylvania	6/1/2015	3/1/2016	√
Analyze course feedback surveys and refine curriculum as necessary	11/15/2016	3/1/2016	√
Develop deployment plan to scale and commercialize beyond BP5	8/1/2015	3/1/2016	√
Identify key markets and education providers needed to reach significant market share	5/1/2015	12/31/2015	√
Perform outreach to market partners, gain commitments	5/1/2015	1/30/2016	√
Draft deployment memo and submit to CBEI/DOE POC	2/1/2016	3/1/2016	√
Final report & supporting materials	3/13/2016	4/30/2016	√
Draft and deliver final report for CBEI review	3/13/2016	4/30/2016	√

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Section 1: Introduction

The objective of the broker training project was to improve the demand and uptake for energy-efficiency measures by educating commercial brokers. This report summarizes the project’s BP5 achievements. In BP4, the project team created a training course, established continuing education credit for that course, and conducted training in Philadelphia. Building on BP4 work, in BP5 the project team extended the reach of the broker training program outside of Philadelphia, performing research on CE requirements and approved providers nationwide, enlisted the help of additional partners, performed outreach to both local providers and national market partners, and sought commitments from major national players.

As shown in the table below and in description of metrics and supporting documents that follow, the Broker Training program has completed the milestones that were set for project in BP5. The project has proven to be one of the more successful efforts in this space on a national level.

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The next sections of this final report describes how the project has met its metrics and how the course will be scaled and commercialized beyond BP5. Supporting materials follow.



Section 2: Metrics

5+ states engaged in discussion about making energy education a mandatory part of CE

Project partners reviewed the CE requirements and the process of getting approved as a mandatory course for all 50 states and D.C., identifying 12 states as good options for future expansion. As described in the deliverable M4.5.a ("Which States Have the Most Potential for Adding Mandatory Continuing Education (CE)?"), the team reached out to the state estate commissions in these 12 states. The team received responses from 6 states. While no state was ready to add energy education as a mandatory part of CE, the conversations opened up future opportunities to offer the course as an elective.

5+ education providers that agree to teach the course in their state

Education providers in 6 states have agreed to teach the course. In California and Pennsylvania, a local realtors trade association will be providing the course. In Nebraska, Colorado, Virginia, and Maryland, local independent providers have agreed to teach the course. Additionally, a green building trade association will be providing the course in Pennsylvania.

To engage these providers, the team undertook an extensive outreach initiative, as described in M4.5.c ("Broker Training Milestone"). In short, the team contacted potential providers by 1) enlisting the help of the national chapter of the National Association of Realtors (NAR), whose commercial division sent outreach on behalf of IMT to the leadership of commercially focused NAR chapters across the country, and 2) by directly contacting over 25 real estate schools across 10 states, and 3) by leveraging relationships previously established through outreach for this project. Real estate schools were targeted based on existing adoption of green courses and earlier research.

100 brokers trained by UPENN project staff/subcontractors

As of April 2016, 270 brokers have been trained. In Indiana, 150 people were trained by IMT, in Maryland/Virginia, 65 trained by a subcontractor (The Kirks Institute), and in Pittsburgh, 35 were trained by IMT and the Realtors Association of Metro Pittsburgh. An additional 20 brokers were trained in San Diego (with course materials, but not with the official course) by IMT. Discussion of select early trainings is attached in M4.5.b_d "Commercial Broker Education").

10+ states identified as potential training markets

The team identified over 15 states based on specific criteria as potential training markets: Georgia, New York, Ohio, Oregon, Washington, Texas, California, Colorado, Connecticut, Minnesota, New Jersey, New Mexico, Iowa, Louisiana, Tennessee, District of Columbia, Massachusetts, Illinois, Florida, and Rhode Island. The team established contacts with providers in these states through local chapters of the National Association of Realtors. The process of identifying and reaching out to providers in these states is described in GNG 4.5.1 ("CBEI Broker Training GNG 4.5.1 Draft").

5+ brokerage firms or trade associations engaged as market partners.

Nine brokerage firms or trade associations have been engaged as market partners this year. These include: Florida Gulf Coast Association of Realtors; Southwestern Energy Efficiency Program; Delaware Valley Green Building Council; Northern California Association of Realtors; Realtors Association of Pittsburgh; Urban Land Institute Pittsburgh Chapter; Indiana Association of Realtors; Certified Commercial Investment Member Institute; and Institute for Real Estate



Management.

Section 3: Develop deployment plan to scale and commercialize beyond BP5

The deployment plan is to to scale and commercialize the course in partnership with the Certified Commercial Investment Member Institute (CCIM). CCIM is a national real estate organization focused on commercial education, with both a well-recognized broker designation and a real estate continuing education arm. Our market research has shown it to be one of the most respected organizations in the industry.

The project team is to partnering with CCIM's Ward Center For Real Estate to offer an online course, which would create an immediate national platform for education. Scaling and commercializing the course via CCIM is in process and should be completed by June 2016. Engaging CCIM is an important step, as their engagement extends the project's impact well beyond initial goals.

Supporting materials:

GNG4_5_1
M_4_5_a
M_4_5_c
M_4_5_b_d

