

Residential Energy Efficiency Loan Assistance Program

Client: California Alternative Energy and Advanced Transportation Financing Authority
2017-ongoing

The Residential Energy Efficiency Loan (REEL) program is part of a pilot program to grow private capital by offering lower-cost financing for energy efficiency projects to more Californians. Frontier Energy recruits and manages contractor participation, which is crucial to the program's success. Our contractor management team bases the program on three strategies that we've proven in other trade ally programs:

1. **Recruitment.** We use a variety of sources to target specific contractors, and then account managers contact leads in person and by phone. We continue to use calling campaigns to keep contractors engaged after enrollment by offering program updates and training opportunities.
2. **Contractor-friendly collateral and events.** We create program materials that are relevant to contractor needs and partner with organizations that have strong relationships with the contractor community.
3. **Contractor tracking.** We use CRM to track contractor recruitment and activities from each contractor, including training sessions, program submissions and significant feedback. We regularly analyze the data to evaluate the recruitment effectiveness and adjust as necessary.

REEL has nearly 400 contractors involved with the program and has supported more than \$10 million in loans. Visit the REEL website at gogreenfinancing.com/residential.



**Offer Trusted Lending Options:
Become a Participating Contractor Today**

Program Overview
GoGreen Financing has lending options for your projects, such as the Residential Energy Efficiency Loan (REEL) program. By becoming a Participating Contractor, you can reach new customers and grow your business.

REEL contractors offer their customers:

- A trusted financing option administered by the State with the support of the investor-owned utilities
- 100% project financing with attractive rates and terms
- No closing costs or prepayment penalties

Contractor Eligibility

- Valid Contractors State License Board (CSLB) license
- No outstanding liens or judgments
- Provide evidence of commercial general liability insurance coverage (at least \$1,000,000 per occurrence)
- Current workers' compensation insurance (if applicable)
- Disciplinary action must not have been taken against the license within the previous twelve months

Offer REEL financing today!
Sign up today. Get started at GoGreenFinancing.com

Why Should I Participate?
Financing is often the difference between gaining and losing a sale.
Benefits include:
- Reduced job cancellations
- Bigger scopes of work

Eligible Measures

- HVAC and duct sealing
- Water heaters
- Insulation and air sealing
- Windows
- Cool roofs
- ... and much more

FRONTIER ENERGY:

- Conducts marketing, education, outreach and recruits residential contractors through events, email, telephone, and relationship building
- Designs marketing collateral for contractor recruiting and program training materials
- Trains contractors via weekly live webinars, an on-demand learning management system, ad hoc training for individual contractors, and in-person group trainings
- Processes contractor application, verifies contractor eligibility and certifies contractors for enrollment
- Manages a CRM to track applications, trainings, and participation in the program. We analyze data and recommend recruitment modifications if necessary
- Is the point of contact for participating contractors via telephone, email and program roundtables
- Verifies project documentation to ensure compliance with program regulations and identify areas of improvement for each participating contractor to coordinate remedial training as needed.
- Manages a subcontractor to perform third-party inspections