

Hard-to-Reach / Hard-to-Serve

Market for the Mass Save[®] Home Energy Services Program

NSTAR and
National Grid
7/26/11

Organizations Represented at Charette

- Alliance to Develop Power
- Boston Climate Action Network
- Coalition Against Poverty/
Coalition for Social Justice
- Chelsea Collaborative
- Chinese Progressive Association
- City of Boston
- CSG, RISE & Next Step Living
- City of New Bedford
- EEAC Members & Consultant
- Green Justice Coalition
- Mass Energy
- Massachusetts Rental Housing
Authority
- Neighborhood of Affordable
Housing
- P.O.W.E.R. Group

Opportunities for education across stakeholder groups proved valuable



Objective

To generate conceptual program ideas to address Hard-to-Reach / Hard-to-Serve customers and identify what in the existing paradigm (i.e. regulatory arena) would need to change and who would need to be involved in permitting these changes to happen.

Cost of Potential Solutions must be Weighed against Projected Benefits



Additional analysis is required to address cost concerns

Start with “High Impact, Easy to Implement”

- Document a clear road map
 - Provide customers who sign up for an audit with a one page description of process
- Encourage Lead Vendors and HPCs to Hire Multi-lingual Energy Specialists
 - To address the language barrier

Note: These items were deemed High Impact/Easy to Implement by some charette participants.

“High Impact, Split between Hard & Easy to Implement”

- Separate out lead generation and on-going customer service throughout the process
 - Renew Boston has hired Landlord Coordinator
 - PA Representative to work with LC to assess progress and identify issues
 - Designed to work with rental properties, emphasis on 3-deckers

Note: Approximately half of the charette participants rated this item as “easy to implement” and the other half “hard to implement”.

“High Impact, Hard to Implement” – Pre-Wx Barriers

- PA activity:
 - Compiling existing data on Pre-Wx issues
 - Discussing draft proposal to expand use of HEAT Loan funds for pre-weatherization issues
 - Encouraging community groups and government officials to apply for block grant funding, foundation grants and other funding available
 - Exploring other existing funding sources (i.e. New Bedford OHCD)

Note: Most of the participants agreed this is a “hard to implement” item due to request for DPU approval.

Next Steps

- Create team to work on “road map” including representatives from:
 - An organization in the Green Justice Coalition
 - New Bedford P.O.W.E.R. group
 - An organization representing the Renew Boston Initiative
- PA representative to continue discussions on how to track results from new Landlord Coordinator position
- PAs to continue discussion on expanding HEAT Load for pre-wx barriers
- NSTAR and NGRID discussing potential strategies for 2012

Clean Energy Solutions LLC



Mass Save[®]

Hard-to-Reach/Hard-to-Serve Charrette

Final Report

Submitted June 20, 2011

Project Sponsors:

Berkshire Gas

Cape Light Compact

Columbia Gas

National Grid

New England Gas

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Executive Summary

On May 17 & 18th, 2011 the Program Administrators (PAs) for the Mass Save[®] Home Energy Services program (Program) sponsored a charrette on the subject of Hard-to-Reach/Hard-to-Serve customers in Massachusetts. Representatives from each of the sponsoring PAs and Program stakeholder groups were invited. The charrette was attended by nearly 40 participants including representatives from the PAs, Lead Vendors, community groups and contractors providing services, and the EEAC.

The objective of the charrette was to generate conceptual program ideas and identify what in the existing paradigm (i.e. regulatory arena) would need to change and who would need to be involved in permitting these changes to happen. The PAs and the Energy Efficiency Advisory Council (EEAC) could then further review these recommendations in their on-going efforts to define Hard-to-Reach/Hard-to-Serve segments and identify potential approaches to addressing this audience.

During the two days roughly 20 program concepts, ranging from fairly straightforward (produce marketing collateral in multiple languages) to rather sophisticated (review the definition of “equitable distribution” as it applies to the Program) were generated and discussed. While some concepts could be enacted by the PAs relatively easily, with others it will be a challenging proposition to move from the conceptual stage to actual program implementation, and will require additional cost-effectiveness analysis and/or policy changes involving not only the EEAC, but the Massachusetts Department of Public Utilities (DPU) as well.

The community and other non-PA participants applauded some Program changes already made, including the return to the “single-visit” energy assessment approach, the recent expansion of the HEAT loan program, the community mobilization initiative (CMI) pilot programs, and for including “service level agreements” or timeframes during which audits must be provided to a customer, in their recent contracts with their Lead Vendors.

Over the two-day period a deeper understanding among some participants of the magnitude of change required to implement several of the suggestions evolved. It was clear in comments made throughout the charrette that many participants had developed a new appreciation for the difficulties faced by various other stakeholders, particularly the requirements with which the PAs must comply. A number of participants noted how valuable it was to begin to understand what other program stakeholders must deal with. Another positive outcome of the charrette that was noted by many of the participants was the opportunity to strengthen relationships within the Mass Save[®] “community” of stakeholders.

With the results of this charrette, all of the Program stakeholders will have in hand a rich description of market segments that currently are considered to be Hard-to-Reach/Hard-to-Serve, along with a set of recommendations that may offer improvement if determined to be cost-effective to implement.

Background

In April of 2011, the PAs engaged Clean Energy Solutions LLC (CES) to conduct a two-day charrette to explore the subject of Hard-to-Reach/Hard-to-Serve market segments for the program. Examples included certain immigrant populations, the elderly, or people who were simply indifferent to the notion of saving energy.

The objective of the charrette was to generate conceptual program ideas and identify what in the existing paradigm (i.e. regulatory arena) would need to change and who would need to be involved in permitting these changes to happen.

The specific questions asked of the participants to achieve this objective included:

- What defines Hard-to-Reach or Hard-to-Serve segments?
- What barriers prevent or limit participation in the Program?
- What strategies could potentially be used to resolve these issues?
- What are the opportunities and challenges associated with the potential solutions?

Most of the solutions proposed by the community groups had been discussed, even if briefly, in prior venues. What was unique about the charrette was the ability of participants to assess potential solutions against a backdrop of the environment (i.e. regulatory) in which the PAs operate. The charrette participants found this to be a very valuable exercise.

The participants of the charrette (Appendix A) encompassed a broad cross-section of stakeholders, including community organizations that were involved in outreach and enrollment activities, Lead Vendors who had responsibility for managing the delivery of the EE measures, sub-contractors participating in the Program and working specifically with communities, a representative from a landlord stakeholder group, several representatives from the EEAC, and the PAs themselves.

Methodology

The CES charrette design was based on developing a series of task-oriented, facilitated breakout sessions, combined with plenary sessions to report back key points from each breakout group. This approach increases the involvement of each participant and typically also increases the amount of information obtained. The participants in each of the breakout teams were chosen to maximize the diversity of backgrounds and interests represented.

For most of the charrette, all of the groups had the same tasks assigned. These tasks were designed to allow the participants to start at “ground zero,” i.e., defining the characteristics of the Hard-to-Reach/Hard-to-Serve populations, and reexamine the problem in concert with the other team members. This approach helped bring all participants to a common understanding and in some cases to shed some

of their preconceived notions about the subject. The agenda¹ was designed so that each task built on the results of the previous task.

The first task was to identify the Hard-to-Reach segments. The teams were asked to list specific examples of Hard-to-Reach “characters” representing customers that they knew from their direct experience. Each team, however, had flexibility to modify their approach if they felt an alternative would work better. Several breakout groups preferred to characterize the individuals as a segment – i.e., as the “Senior Citizens” segment, rather than “Carl and Gladys.” They also were tasked with creating a short profile of the individual or segment’s demographic and behavioral characteristics such as attitudes towards energy, cost savings, environment, and sources of influence that would be relevant to the problem. Based on these individual (or segment) profiles the teams then identified those characteristics that created barriers to participation.

Once a list of these barriers had been developed, the teams were asked to generate program options that could potentially overcome the barriers.

Finally, the teams were to look at these program options and think through what steps -- and what other stakeholders -- would be required to implement them. Given the number of suggestions included, this served to be a formidable, but productive, task.

In pre-charrette discussions, the characteristics of the Hard-to-Serve segment were believed to be independent of the Hard-to-Reach segment and thus should be addressed separately. Accordingly, on the second day, the teams were reorganized and tackled the issues around the Hard-to-Serve segment. The process was much like that described above for the Hard-to-Reach segment, although the barriers tended to focus more on process characteristics or perceived process breakdowns leading to customers dropping out or otherwise not completing the program. Finally, in the closing session the participants were asked to list the “Big Ideas” that they thought had come out of the charrette. Once this list had been generated, they were asked to categorize them with respect to their ease of implementation, and their impact on the target segments.

Program Concepts

While many of the ideas discussed at the charrette were first raised during other venues such as community pilot program team meetings and public comment periods in EEAC meetings, the unique aspect of this charrette was that it provided participants with a forum to identify “what it would take” to make some of the recommended changes. In these discussions it was apparent that making some of the suggestions a reality would involve complex decision processes involving other organizations and regulators, not just the PAs alone or the even the full EEAC.

The following sections focus on the “Big Ideas” generated during the charrette. Many were specifically identified during the closing session, while others were repeated many times across the breakout teams over the course of the charrette. The first section lists features that the participants found admirable

¹ See Agenda in Appendix B

about the current programs. The following sections discuss ideas related to enhancing first the “Marketing” and then the “Delivery” of the program. The final section lists ideas from the participants that are larger and more programmatic in scope and are likely to require regulatory action to implement.

Applauded

The charrette participants found a number of things to applaud about recent changes in the Program. Examples of their comments include:

- Returning to the “Single-visit” energy assessment approach was a positive step for the customers.
- The community-based pilot programs have generated a number of new approaches. The on-line sign-up system that was used in the Renew Boston program was cited as one example.
- The recent expansion of the HEAT loan program was appreciated.
- The community groups also applauded the PAs for including “service level agreements” or timeframes during which audits must be provided to a customer, in the latest contracts with their Lead Vendors.

Marketing

Targeted Marketing. Different customer segments with unique characteristics, needs and barriers to participation in the Program were identified. Although challenging and potentially costly, many of the potential solutions identified focused on tailoring Program marketing and delivery to a specific segment in order to overcome the barriers identified. For example, language and cultural translations, use of targeted media channels, messages to address specific fears of senior citizens or priorities of landlords, and so on. Provided below is a listing of the segments identified.

- Condo owners (1-4 units)
- Contractor installs/missed opportunities (i.e., HVAC replacements)
- Ethnic/cultural minorities (many sub-segments)
- Generational (unplugged/overly plugged-in)
- Government/Program averse
- High income/no interest in Program benefits
- Landlords/Property Managers
- Low-to-moderate income customers
- Multiple families/generations in household
- Poorly educated/illiterate
- Renters
 - Young Renters/Students
- Rural/sparsely populated areas
- Seasonal tenants (Chinatown, Cape)
- Sr. Citizens

Program Collateral. Essentially all of the teams pointed to improvements that could be made in the existing program collateral. Frequent suggestions included simplification of the material, and development of a clear pathway for the customer to follow.

Another major proposal focused on producing cultural- and language-specific marketing and outreach materials customized for the neighborhoods being served (community-centric messaging). There was a sense that effective collateral materials will require more than “translation”. The materials will need to be developed to reflect the cultural mores of the community using familiar ideas and local vernacular.

There was also a lot of support to engage trusted messengers, e.g., community-based non-profit organizations and/or community leaders in marketing and delivering customers to the Program. These resources are also likely to be useful in terms of designing community-specific marketing collateral, given their connection to, and involvement with the target audience. Some of the participants noted that access to sources of influence is important for all Hard-to-Reach/Hard-To-Serve segments including those who for one reason or another are indifferent to saving energy.

HVAC and Plumbing Contractors. Discussions about missed opportunities in system replacements suggested a need to better inform contractors about the program benefits, process and advantages of high efficiency equipment. Some noted that contractors might be misinformed about high efficiency equipment and unfamiliar with it.

Non-traditional Marketing Channels. Essentially all of the Teams proposed that the PAs increase their use of non-traditional marketing channels. These covered a broad range, from “Groupon”-type on-line marketing approaches, to working with real estate brokers and landlord associations. In line with the emphasis on language- and culturally-specific marketing materials discussed above, the participants also emphasized the importance of using easily accessible and trusted delivery channels for ethnic minorities and seniors. This could range from non-English based local publications to local radio stations.

Addressing Customer Fears. Again, essentially all of the groups noted that a major barrier to participation across a variety of Hard-to-Reach/Hard-to-Serve customer segments was the perception that -- in one manner or another -- participation in the Program would put them at risk. These perceived risks included concern about exposure of building code violations, immigration officials, and personal security risks associated with “strangers” entering the premises. The participants recommended that the marketing messages address these fears with information explaining how the Program does or does not interface with other government organizations such as INS and the local building officials.

Another idea was to explore a short-term building code violation “amnesty” to code violations uncovered by Energy Assessors. Exact terms of the amnesty would need to be worked out with the building department prior to launch and the group agreed that this effort would be challenging at best. Currently, this type of program cannot even be legally offered by the PAs.

Delivery

Community Based Pilot Programs. Some of the participants felt that the existing community mobilization/ community based pilot programs, while still a “work in progress,” offered a model that could be effective with Hard-to-Reach/Hard-to-Serve customers. It was noted in some teams that these programs can be more expensive to deliver, with varying views being expressed about the ability to counter higher costs with increased energy savings. The proposals typically were to analyze the information gathered from these pilots through the third party evaluators and then consider expanding this type of program into more areas, particularly areas more likely to have a high proportion of Hard-to-Reach/Hard-to-Serve customers.

Incentive Structure. A number of participants suggested changing the incentive structure, particularly for those whose income falls just above the low-income threshold. Ideas ranged from raising the income level for zero co-pay eligibility to developing tiered incentives based on income levels. Further analysis was suggested to determine if deeper savings could be achieved and still achieve an acceptable Benefit/Cost ratio (given increased cost), or to determine if community groups could obtain access to other sources of funding. Discussions identified a number of challenges including rate impacts to customers, administrative challenges, and the difficulty of verifying income levels. Based on recent findings from a community program using ARRA funds to provide a 100% subsidy to income eligible participants, verifying customer incomes (as is traditionally done in the Low Income sector) has posed a significant challenge in this market segment.

Multi-unit buildings. The participants appeared to have a lot of concerns about the complexity of enrolling and serving “multi-unit” buildings (defined here to include both rentals and condos, in any building with between two and four units). A lot of the complexity seemed to be associated with the requirement to collect permission and personal information (e.g. utility account numbers, and identity) from the tenants, the building owner/manager (BOM), or the Condo Owners Association. The split-incentive phenomenon was something that all participants agreed plagued this market segment. Coordination between market rate and Low Income programs is also required.

Trade-ally Programs. Outreach to the local contractors was mentioned above under the Marketing section, but this suggestion really expands that idea into enlisting those contractors in some type of more formal trade-ally program. This could include not only the outreach and education efforts outlined above but would also involve some on-going interactions, possibly including an incentive to the contractors for bringing eligible customers into and through the Program. One key motivation for this proposal was capturing the opportunity offered when replacement of HVAC equipment is being considered. If the normal supply channels for those appliances are already involved in the program -- and aware of the benefits to both themselves and their customers -- the program could avoid the “lost opportunity” that replacement with a less efficient unit would create.

At least one team pushed this idea even further, envisioning a “Local Trusted Contractor” (LTC) program in which the community groups would align themselves with a local weatherization contractor who meets program eligibility requirements. The community groups would bring in new business, providing good projects close to their base territory. A second benefit of the LTC program might be to alleviate the

customers' anxiety about who is coming into their homes and the quality of the work they can expect. PA representatives noted that the LTC program falls well within the new expanded open market model where participating Home Performance Contractors (HPCs) and Independent Insulation Contractors (IICs) can tag customers and take them through the entire process.

Concierge or Case Manager. One proposal that arose in a number of groups across both days was to have the Program institute a "concierge" or "case manager" interface with the participants. The function of the concierge would be to work directly with the customer from enrollment through project completion, offering help and advice, and directly assisting with things like overcoming language barriers, establishing eligibility, identifying and scheduling contractors.

Data Collection and Communication. Data collection, communication, and assessment were mentioned in several teams as a potential area for process improvement. The concerns varied - including communication between the different collaborators (noted by a community-based pilot program participant), the level of detail requested by community-based organizations to enable tracking and reporting, and feedback mechanisms for community groups to understand how successful their activities have been. While all parties agreed that there is room for improvement in communication among all stakeholders, it was noted in at least one team that the degree of frustration experienced by the community groups was much less when the PAs and their Lead Vendors were notified of the initiative and asked to participate in the development of the process. In some cases, PAs reported that they were not asked to be involved, or even informed, of some community-based initiatives.

Another concern identified by some participants was the need to receive customer feedback and evaluation results sooner.

Further discussion is needed to identify and prioritize data needs that would improve the success of the Program. Options for capturing and communicating information and the associated administrative and implementation costs will need to be evaluated against the cost-effectiveness requirements for the Program.

Use of the Internet. Some participants felt that the Program could probably make better use of the web to streamline and speed the processes. Specific suggestions included improvements to the existing web page making it simpler to use, and allowing customers to pre-qualify and schedule appointments on-line. (See additional suggestions for the web interface above in Marketing.) At the same time, other participants were wary of relying too heavily on the web, since the level of technology use among Hard-to-Reach/Hard-to-Serve segments may be less than the statewide average.

Energy Assessor. The Energy Assessor role also drew some suggestions from the charrette participants. A number proposed that Energy Assessors be recruited by the HPCs or Lead Vendors from the targeted ethnic populations and/or trained to be ethnically sensitive to the population they are serving. This could also be the role of the new Home performance Contractors in the new market model.

Another suggestion was that the Assessor "engage beyond the light bulb" more consistently, and that they carefully explain not only "what" measures were being recommended, but also project the benefits

of those measurements and provide a clear roadmap to help the customer know what to expect or how to complete the program. (Note that under a “concierge” program these functions could belong to the Assessor, the Concierge, or both.) The PAs and their Lead Vendors responded that this type of education is currently within the duties of an Energy Assessor and in many cases post-satisfaction surveys have shown that this occurred. It may be that some sort of refresher program periodically would be helpful along with improvements in program collateral as discussed earlier.

Pre-weatherization Measures. There was near-universal concern with the role pre-weatherization issues play in slowing or stopping full participation the Program. Some participants suggested that focus initially be placed on resolving low-cost (e.g. less than \$250) measures that would allow the weatherization to proceed. One Team estimated that this class of issues (e.g. ensuring that legacy “knob and tube” wiring was not energized, tuning heating systems, improved dryer venting, etc.) represented a significant portion -- perhaps a majority -- of pre-weatherization barriers, and given their relatively low-cost, should not be a barrier to implementing the larger Program measures. Whether or not these pre-weatherization issues “should” be a barrier to installing air sealing and insulation, it is important to recognize that current regulations do not allow PAs to make such expenditures. (See additional discussion of pre-weatherization financing below under Financing, and Neighborhood Blitz.)

Ideas for accomplishing this included evaluating TRC benefits if the low-cost repairs were included, and changing the governing statute so that the Program could finance these low-level repairs itself. Another idea was to expand eligibility for the HEAT loan program to cover these improvements, and one group suggested that it might be possible for community groups to apply for Community Block grants to fund these measures or seek other funding sources.

Financing. Perhaps predictably, this topic was part of the discussion among some participants in every group. Concerns expressed included the customer’s inability to accumulate enough cash to manage the co-pay, fear of incurring debt, concern about impact on credit rating, and so forth. The charrette participants suggested that the recent expansion of the HEAT loan program for improvements could be better publicized, and the program might be expanded even further to cover pre-weatherization measures as well. Another suggestion was to establish a micro-loan program, possibly funded through Foundation grants.

On-bill financing (OBF) was also proposed as a way to address most of these barriers. With the loan attached to the “meter” (i.e. the utility account), the obligation stays with the unit, not the tenant. As a result, this type of loan has no impact on the customer’s debt load or credit rating, and does not require an upfront co-payment, and as long as the customer’s total bill is decreased they will benefit directly. OBF also intrinsically resolves the Split Incentive problem inherent in rentals where the tenant pays the utility bills or with condo owners associations that only finance improvements outside the individual unit owner’s designated property line. Despite the apparent benefits of this approach, a number of complications were noted. A landlord may find it more difficult to rent units where the co-pay is still being financed since the tenant could find a unit with the measures already installed, but the charges have been paid in full. Also, this strategy would require “full disclosure” about the costs to be incurred before the unit is rented and the utilities placed in the new tenant’s name. It was not clear how this

would be managed or enforced. Finally costs associated with changes from PA billing systems would be incurred since today an outstanding balance stays with the original customer and does not transfer to the new occupant (or stay with the meter).

Neighborhood “Blitz.” One approach suggested targeting specific neighborhoods where income eligibility had already been determined through other avenues (such as census tract information), and addressing this neighborhood in a “blitz” fashion. If staged by a single program team and single contractor, these areas could provide efficiencies of scale that might improve overall cost-effectiveness and program penetration. In addition this approach takes advantage of neighbors encouraging neighbors to participate, and the “curiosity factor” that can also drive up participation. A stakeholder representing the EEAC raised the issue of potential complaints if customers who live in these income eligible census blocks were treated through the program while having an income above the targeted level. There would be equity issues associated with this solution that would need to be addressed.

Administration

There were also several proposals that were more general, or involved the overall philosophy under which the Program operates.

PA Incentive Structure. The current incentive structure for the PAs rewards them based on maximizing savings and keeping the cost per/kwh (or therm) saved low. Some participants felt that this structure could be modified to place less emphasis on the cost, and permit incentives for broader outreach and higher levels of service to the Hard-to-Reach/Hard-to-Serve segments. The PAs stated, however, that this strategy could result in lower overall savings in the state because of the increased cost. This may pose an issue for some of the EEAC members concerned with maximizing statewide energy savings as well as those who are concerned about rate impacts.

Equitable Distribution. On a somewhat related note, there were some proposals to establish a team to study the issue of “equitable distribution” as it applied to the Program. This was based on the position that while this proposed population (those with roughly 60% to 120% of the state median income) arguably contributes a larger proportion of their income to the Program and that due to inability to muster the co-payment and other barriers listed here they were effectively barred from participating. Some participants felt that this situation created another type of inequitable distribution of program incentives and benefits. PA representatives and regulators explained that the “total resource test”, which is used for determining cost effectiveness, does not factor in “where the savings come from” (i.e. what percentage of a customer’s income is spent on energy bills). Another definition of equitable distribution was discussed, with some participants noting that members of the population above 120% of state median income are typically paying more into the systems benefits charge and due potentially to apathy or other reasons, do not benefit from what they pay in.

Annual Project Cap. Finally, there were a number of participants that argued that the current annual “cap” on individual projects actually increases the overall cost of larger projects or reduces the degree of energy efficiency achieved. This occurs because work on a large project must stop when the annual per-project cap is reached, and then has to be re-started again later when funding becomes available. One

potential solution might be to increase the per-project cap but design it to cover multiple years instead of a single year, which some PAs have already implemented.

Results

The charrette produced a rich and diverse set of outputs, including many insights and good program ideas for consideration.

One of the striking results of the charrette was the degree of overlap observed, not only across teams but also between the Hard-to-Reach/Hard-to-Serve segments. It would appear that, at least from the participants' points of view, the Hard-to-Reach/Hard-to-Serve segments have many common characteristics in both their barriers and proposed solutions.

This commonality is summarized in the consolidated list of barriers in Appendix C, and summarized in Figure 1, which shows a high-level grouping of the barriers into eight broad categories. Barriers that result from characteristics of either the customer or their type of housing are shown on the left side of the figure. The ovals on the right represent potential Program Delivery Complications that could result in customers not completing participation in the program services. The ovals are shown overlapping, symbolizing that the barriers are not mutually exclusive.

Customer Barriers

- Not fluent in English
- Not receiving information
- Technical terms
- Not a trusted messenger

- No benefits perceived
- EE not valued/understood
- Too much hassle
- Fear of requirements

- Financial/credit
- Pre-weatherization work
- Limited or no time
- Can't be home when required

- Landlords difficult to reach
- Tenant willingness
- Poor tenant/landlord relations
- Property managers as "gates"
- Split incentives



Potential Program Delivery Complications

- Confusion about eligibility
- Annual funding caps require multi-year participation

- Process/steps not clear
- Language is too technical
- Translation needs
- Different materials across PAs confusing to landlords, contractors, etc.

- Long lead times
- Lack of follow-up
- Many different contacts
- Not clear who to call

- Assessors not consistent in communications
- HVAC contractors not informed or misinformed (process, product quality, installation...)
- No incentive for contractor to refer vs. hassle of paperwork

Barriers overlap...HTR/HTS customers may have one or many

Figure 1. Barriers to entering or completing the Program.

Figure 2a shows the solutions suggested for barriers that result from customer issues and housing characteristics. Note that for each barrier identified, a wide range of potential solutions was suggested.

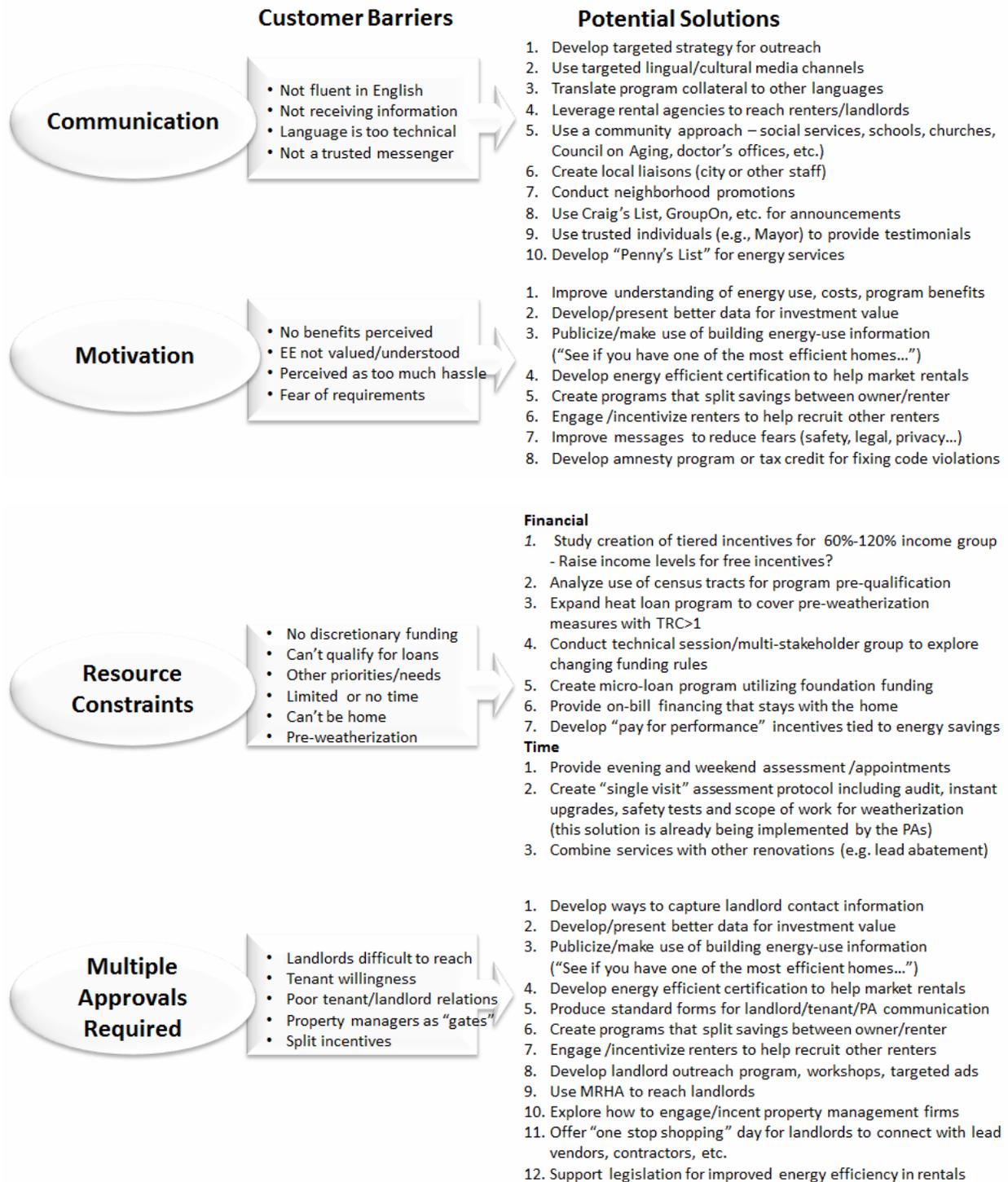


Figure 2a. Potential solutions to the Hard-to-Reach/Hard-to-Serve customer barriers.

Figure 2b illustrates the range of solutions that the charrette participants proposed to the barriers associated with potential program delivery complications.

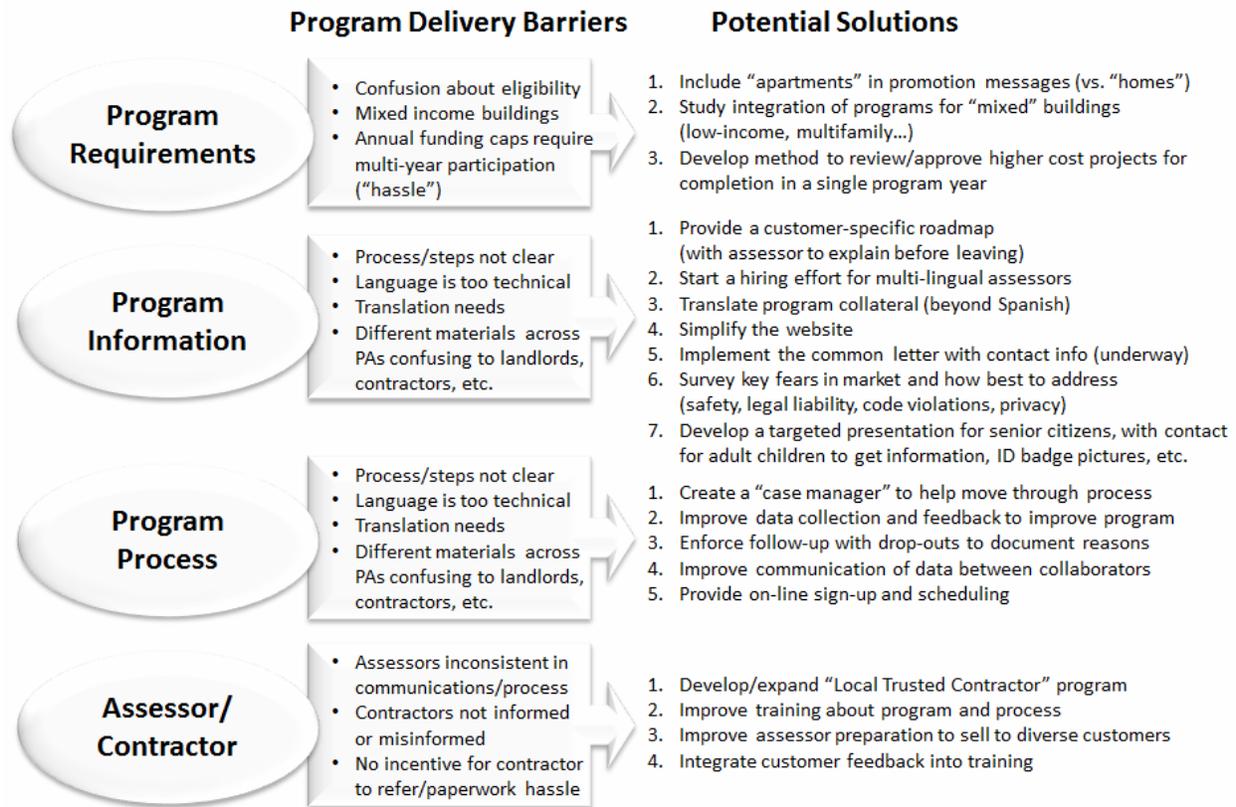


Figure 2b. Potential solutions to the Hard-to-Reach/Hard-to-Serve program barriers.

Conclusions

The charrette was quite successful in several important respects. The participants were able to reach some consensus around their perceptions of the Hard-to-Reach/Hard-to-Serve segments and the issues that cause difficulty reaching customers or providing Program services. Another area in which great strides were made is in the contacts and relationships that were either begun or advanced during the charrette. It was clear that many of the participants, despite working on similar issues only a few miles apart, had never met. Their interaction produced lively and productive exchanges.

One of the main objectives for the charrette was to have the participants begin to appreciate the challenges inherent in implementing some of the previously identified proposals. Comments throughout the sessions indicated that the dialog during these two days did begin to deepen understanding from a number of perspectives. At the closing one community organizer offered that he had never realized how difficult a position the PAs were in. And there were a number of “light bulb goes on” moments, as

participants would suddenly realize how some other part of the Program worked, and the constraints that it faced. The time taken to listen to each other's perspectives seems valuable in increasing the level of understanding among the participants.

Looking at the results overall, probably the most pervasive underlying theme that emerged from the charrette was that there is not a "one size fits all" solution for the Hard-to-Reach/Hard-to-Serve challenge. The participant work identified multiple customer segments/barriers that can be overlapping. For example, a customer may be a member of the Spanish community with little English fluency, may not have any familiarity with energy efficiency benefits, be a renter, and have working hours that make it difficult to be home for services. Not only is there not a single solution path, successful outreach and delivery may require the flexibility to integrate different elements of solutions for the customer.

With the results of this charrette, all of the program stakeholders will have in-hand a rich description of the market segments that currently are considered to be Hard-to-Reach or Hard-to-Serve, along with a set of recommendations that may offer improvement. Moving several of these ideas from the conceptual stage to actual program implementation will be a challenging proposition that would likely require policy changes which involve not only the EEAC, but the Massachusetts Department of Public Utilities (DPU) as well.

Hard-to-Reach/Hard-to-Serve Charrette Appendices

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Hard-to-Reach/Hard-to-Serve Charrette Appendices

Appendix A – Attendees

Hard-to-Reach / Hard-to-Serve Charrette Participants		
Last Name	First Name	Organization
Berube	Liz	LEAN
Bonggiovanni	Roseann	Chelsea Collaborative
Shear	Boone	Alliance to Develop Power
Breslow	Marc	DOER
Vavak	Amy	Mass Energy
Fastino	Debbie	Coalition Against Poverty/Coalition for Social Justice
Foltz	Kim	Neighborhood of Affordable Housing
Lopez	Lourdes	Renew Boston / City of Boston
Gorham	Chris	RISE
Gudell	Jan	NSTAR
Harak	Charlie	National Consumer Law Center
Hayes	Loie	Boston Climate Action Network
Hetel	K	MRHA
Howat	John	National Consumer Law Center
Huckabee	Lyn	DOER
Ibrahim	Monica	NGRID
Izzo	Margie	Columbia Gas
Kearney	Brian	NGRID
Kimball	Derek	UNITIL
Liu	Mark	Chinese Progressive Association
Livermore	John	EEAC Consultant
Loh	Penn	EEAC
Lombos	Darlene	Green Justice Coalition
Lydgate	Kalia	City of New Bedford / P.O.W.E.R Group
Mazuera	Katekyn	NSTAR
Murphy	Marilyn	LEAN

Hard-to-Reach/Hard-to-Serve Charrette Appendices

Hard-to-Reach / Hard-to-Serve Charrette Participants		
Last Name	First Name	Organization
Nutter	Sam	CSG
Rathbun	Danielle	Attorney General's Office
Shapiro	Gabe	Next Step Living
Shenk	Jeremy	Green Justice Coalition
Song	Margaret	Cape Light Compact
Tench	Danah	EEAC
Walsh	John	Western Mass. Electric
Wingate	Peter	LEAN

Hard-to-Reach/Hard-to-Serve Charrette Appendices

Appendix B - Agenda

<p>Agenda for the Hard-to-Reach/Hard-to-Serve (HTR/HTS) Charrette May 17 & 18th Hilton - Dedham MA</p>
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Day 1 – Tuesday, May 17 th					
Time	Activity				Leader
7:30-8:15	Breakfast (Plenary Room)				
8:15-8:30	Module 1 - Plenary – Welcome, Introductions, and Kickoff				Facilitator
8:30-9:00	Welcome and Charge: Penni Conner, NSTAR				Penni Conner
9:00 - 10:15	Introductions				Facilitator
10:00-10:15	Charrette Overview/Expectations				Facilitator
10:15-10:30	Break				
10:30-12:00	Module 2 - Breakout - Define Hard-to-Reach Segments				
12:00-1:00	Lunch - Presentation on Other States/Other Regions				
1:00-1:45	Module 3 - Plenary - Report from Breakout Groups				
1:45-3:00	Module 4 - Breakout - Identify Solutions to Existing Barriers				
	Group 1	Group 2	Group 3	Group 4	
3:00-3:15	Break				
3:15 - 3:45	Module 5 - Breakout - What are the Opportunities and Challenges for these Solutions?				
	Group 1	Group 2	Group 3	Group 4	
3:45 - 5:00	Module 6 - HTR Report Out				
5:00	Adjourn				

Hard-to-Reach/Hard-to-Serve Charrette Appendices

Agenda for the
Hard-to-Reach/Hard-to-Serve (HTR/HTS) Charrette
 May 17 & 18th
 Hilton - Dedham MA

Day 2 - Wednesday, May 18 th					
Time	Activity				Leader
7:30-8:00	Breakfast				
8:00-8:30	Intro - Plenary - Good Morning!				Facilitator
8:30- 9:30	Module 7 - Breakout - Define "Hard-to-Serve" Segments				
	Group 1	Group 2	Group 3	Group 4	
9:30-10:00	Module 8 - Plenary - Report Breakout Team Assignment:				
10:00-10:15	Break				
10:15-11:30	Module 9 - Identify Solutions to Existing Barriers				
	Group 1	Group 2	Group 3	Group 4	
11:30 - 12:30	Working Lunch : Module 10 -Breakout - Opportunities and Challenges of Program Design Elements				Facilitator
	Group 1	Group 2	Group 3	Group 4	
12:30 - 1:30	Module 11 -Program Design Report Out				Facilitator
1:30 - 2:30	Module 12 –Plenary - Prioritization				Facilitator
2:30 - 2:45	Break				
2:45 - 3:30	Module 13 - Charrette Wrap Up				Facilitator
	Closing Comments				John Livermore
3:30 PM	Adjourn				

Appendix C–Summary Results

1.0 Participants’ List of “Big Ideas”

At the end of the charrette, the participants were asked to identify the “Big Ideas” that they thought had been identified during the two days. For each, they were asked to vote on where these ideas would rank with respect to “ease of implementation” and “impact on resolving barriers,” as shown in Figure 1.

In interpreting these results, it needs to be recognized that the participants were not selected in direct proportion to the number of stakeholder groups represented, but rather with a focus on community organizations involved in the Hard-to-Reach /Hard-to-Serve sectors; therefore collectively they are not a “balanced” or “representative” population. Nonetheless, the results offer insights about the participant perceptions.

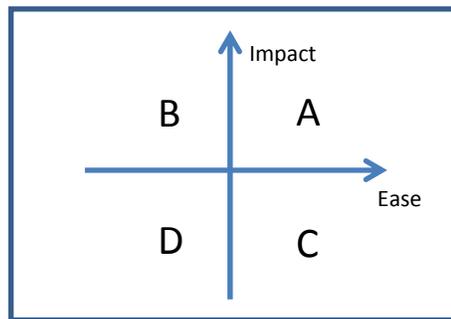


Figure 1. Diagram for ranking relative "impact on barriers" vs. "ease of implementation"

Rating matrix:

A = high impact, easy to implement

B = high impact, hard to implement

C = low impact, easy to implement

D = low impact, hard to implement

Hard-to-Reach/Hard-to-Serve Charrette Appendices

Table 1. Big Ideas Identified by Participants in closing session

Big Ideas Identified by Participants	Quadrant			
	High Impact		Low Impact	
	Easy	Hard	Easy	Hard
	A	B	C	D
1 Trusted contractor program	11	13	7	1
2 Segmented approach to outreach	13	14	0	0
3 Tiered incentive study (60-120)	4	24	1	3
4 Expand heat loan	9	19	0	0
5 Case manager program	14	13	2	2
6 Document clear roadmap	19	2	10	0
7 Analyze census use to streamline	8	9	6	8
8 Expand landlord outreach programs	8	3	19	0
9 Align PA incentives for HTR/HTS	1	27	0	2
10 Hiring effort for multilingual energy advisors	17	6	4	0
11 Translate (interpret) all program collateral	4	6	15	5
12 Improve data communication between collaborators	0	22	2	3
13 Improve data collection feedback for HTR/S improvement.	0	14	1	10
14 Amnesty for code violations	0	6	6	17
15 Study integration of programs for mixed income buildings	9	18	0	2
16 Allow large projects to exceed cap	12	8	4	2

Table 1 summarizes how the participants in the Hard-to-Reach /Hard-to-Serve charrette rated the “Big Ideas” identified in the charrette discussions for degree of impact and ease of implementation.

Note that the highest number of votes went to items that were judged as hard to implement. Also notice the divergence in the degree of impact expected for some ideas, including the development of a clear roadmap and translation of program materials.

The results in the **High Impact** category are plotted in 2 and 3, separating the “easy” to implement from the “hard” to implement.

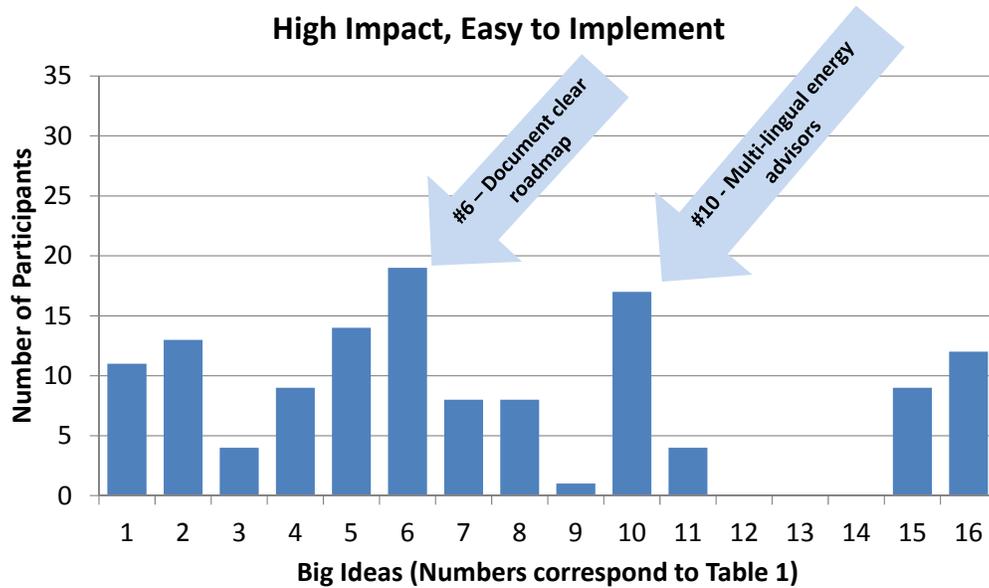


Figure 2. High impact, easy to implement ideas as ranked by the participants.

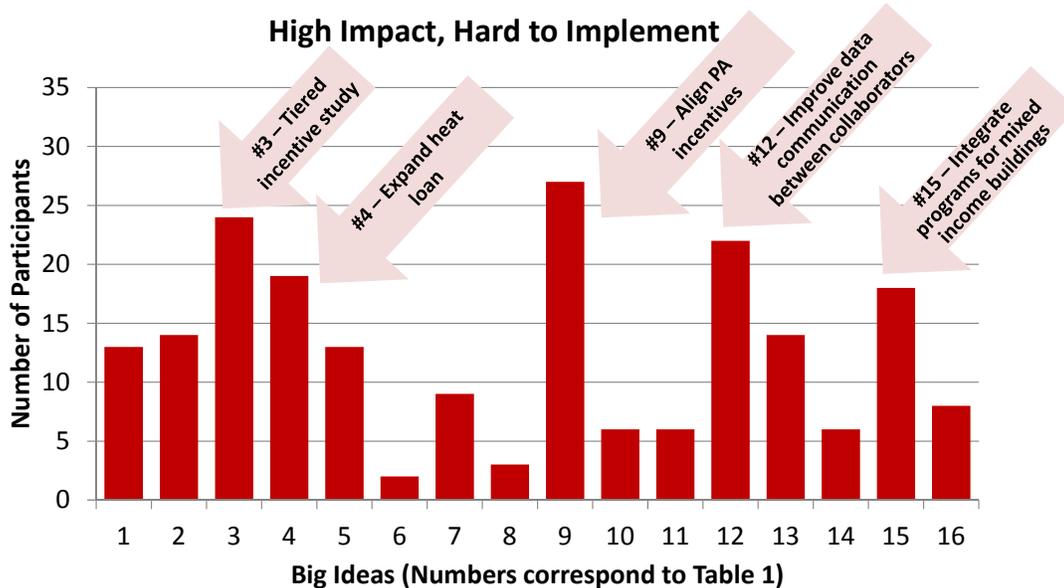


Figure 3. High impact, hard-to implement Ideas as ranked by the participants.

Hard-to-Reach/Hard-to-Serve Charrette Appendices

2.0 Summary of Barriers Identified (all Teams, HTR and HTS)

Table below lists the combined Barriers from all of the teams. There was a high level of overlap between the barriers for Hard-to-Reach/Hard-to-Serve as each challenge was discussed over the two days. Both are listed here with a box to indicate which category the participants felt that they applied to. The sub-points highlight the divergence within each larger category.

Table 2. Combined list of Barriers for HTR and HTS

Summary of Barriers Identified	HTR	HTS
Pre-weatherization		
Physical corrections to existing buildings required before weatherization can proceed		<input type="checkbox"/>
Prior work is an obstacle		<input type="checkbox"/>
Financial		
Lack of discretionary money for co-payment or pre-weatherization measures	<input type="checkbox"/>	<input type="checkbox"/>
Difficulty accessing credit		<input type="checkbox"/>
Lack of understanding of energy efficiency (EE) benefits and payback or low or no perceived value for EE	<input type="checkbox"/>	
Low awareness of HEAT loan program	<input type="checkbox"/>	<input type="checkbox"/>
Program caps result in high-cost project(s) requiring multiple years of participation		<input type="checkbox"/>
Confusion caused by multiple programs with different qualifications		<input type="checkbox"/>
High cost to reach and serve low density rural populations	<input type="checkbox"/>	<input type="checkbox"/>
Time Constraints		
Program hours conflict with customer's work schedule	<input type="checkbox"/>	<input type="checkbox"/>
Multiple visits required by program, compete for Customer's time	<input type="checkbox"/>	<input type="checkbox"/>
Drop-outs due to delays between initial contact, energy survey, measure installation		<input type="checkbox"/>
Lack quick response for equipment/emergency replacement HVAC		<input type="checkbox"/>

Hard-to-Reach/Hard-to-Serve Charrette Appendices

Summary of Barriers Identified (Continued)	HTR	HTS
Split incentives between landlords, tenants and homeowner or condo associations - Additional barriers for each group are noted below.		
Who pays the bill for EE vs. who sees the benefit	<input type="checkbox"/>	<input type="checkbox"/>
Difficult to access and serve	<input type="checkbox"/>	<input type="checkbox"/>
Landlords		
Hard-to identify - not always listed in utility records/databases for the property	<input type="checkbox"/>	
Lack of program awareness or understanding how to qualify	<input type="checkbox"/>	
Lack of perceived benefits/lengthy payback and depreciation	<input type="checkbox"/>	<input type="checkbox"/>
Financial investors – no incentive for further investment in property	<input type="checkbox"/>	
Time and hassle to coordinate with program, lead vendors, tenants	<input type="checkbox"/>	<input type="checkbox"/>
Fear of exposure of existing code violations on the property	<input type="checkbox"/>	<input type="checkbox"/>
Building access is difficult at non-owner occupied properties		<input type="checkbox"/>
Conflicts with tenants affect landlord willingness to participate	<input type="checkbox"/>	<input type="checkbox"/>
Tenants		
Lack authority to make capital decisions		<input type="checkbox"/>
Lack of program awareness or understanding how to qualify	<input type="checkbox"/>	
Do not understand their energy use and efficiency opportunities	<input type="checkbox"/>	<input type="checkbox"/>
Fear of inspections/don't want others in home	<input type="checkbox"/>	
Not interested – move frequently	<input type="checkbox"/>	
Fear of incurring additional costs	<input type="checkbox"/>	<input type="checkbox"/>
Income verification requirements (may have unreported income)		<input type="checkbox"/>
Fear of landlord reprisals	<input type="checkbox"/>	
Home/Condo-Owner Associations		
Capital expenditures from general funds have unequal benefits among units	<input type="checkbox"/>	<input type="checkbox"/>
Need to get decision from Board of HOA (in multi-unit buildings)		<input type="checkbox"/>
Neighborhood politics or conflicts	<input type="checkbox"/>	<input type="checkbox"/>

Hard-to-Reach/Hard-to-Serve Charrette Appendices

Summary of Barriers Identified (Continued)	HTR	HTS
HVAC contractors' impact on program's ability to reach and serve customers		
Poorly informed about the programs available and energy-efficient product options	<input type="checkbox"/>	
Unfamiliar (or misinformed) with high-efficiency equipment	<input type="checkbox"/>	<input type="checkbox"/>
Low/No value for the HVAC and plumbing contractors to offset "hassle factor" (paperwork, time, etc.) when replacing failed equipment	<input type="checkbox"/>	<input type="checkbox"/>
Contractor specialization – no interest in cross-selling of other efficiency measures	<input type="checkbox"/>	<input type="checkbox"/>
Language		
Traditional (English speaking) marketing channels are not effective	<input type="checkbox"/>	
Low understanding and/or interest for energy efficiency	<input type="checkbox"/>	
Lack of marketing and media materials in multiple languages	<input type="checkbox"/>	
Program literature too technical	<input type="checkbox"/>	
Lack of translation assistance throughout process		<input type="checkbox"/>
Lack of trained/trusted community insiders to advocate within the community	<input type="checkbox"/>	<input type="checkbox"/>
Culture and Social Norms		
Lack of understanding by program team, of unique cultural/social business practices	<input type="checkbox"/>	<input type="checkbox"/>
Economic status (high or low)	<input type="checkbox"/>	
Indifference to energy efficiency	<input type="checkbox"/>	<input type="checkbox"/>
Mistrust (of both the message and the messenger)	<input type="checkbox"/>	<input type="checkbox"/>
Perceived Hassle Factor		
Confusion about income qualifications (e.g., who's is counted, tenant or landlord)	<input type="checkbox"/>	
Confusion when tenants in multi-unit buildings qualify for different programs	<input type="checkbox"/>	<input type="checkbox"/>
Differing program formats and inconsistent program materials across PAs	<input type="checkbox"/>	<input type="checkbox"/>
Long lead times and lack of follow-up		<input type="checkbox"/>
Resistance to go through program a second time for increased benefit	<input type="checkbox"/>	
Multiple and/or changing contacts for one project (assessor or contractor)		<input type="checkbox"/>

Hard-to-Reach/Hard-to-Serve Charrette Appendices

3.0 Summary of Solutions Suggested (all Teams, HTR and HTS)

Table below lists the combined Solutions developed by all of the teams. This list was generated from all of the teams' outputs, combining those that were identical or nearly identical. Divergence within each larger category is highlighted in the sub-levels. Since there was a high level of overlap between the two solution sets they are listed here with a box to indicate which category the participants felt that they applied to.

Table 3. Combined list of solutions indicating applicability to both HTR and HTS customers

Summary of Solutions Suggested	HTR	HTS
Pre-weatherization (see also Financial)		
Evaluate economics and legality of funding lower cost pre-weatherization costs		<input type="checkbox"/>
Financial		
Improve incentives for multi-unit residences to 100% or develop a tiered scale		<input type="checkbox"/>
Improve incentives for all middle income customers including raising income levels for free incentives	<input type="checkbox"/>	<input type="checkbox"/>
Improve incentives in exchange for landlord concessions (i.e., rent freeze for a period)	<input type="checkbox"/>	<input type="checkbox"/>
Prioritize individual census blocks based on predominant income levels - All residents are prequalified and receive additional incentives		<input type="checkbox"/>
Develop "Pay for Performance" incentives tied to energy savings	<input type="checkbox"/>	
Expand HEAT loan to cover pre-weatherization measures with TRC>1		<input type="checkbox"/>
Develop method to review and approve high cost projects (over program limit) for completion in a single program year		<input type="checkbox"/>
Create micro-loan program utilizing foundation dollars		<input type="checkbox"/>
Provide on-bill financing that stays with the home		<input type="checkbox"/>
Time Constraints		
Provide evening and weekend assessments and appointments	<input type="checkbox"/>	<input type="checkbox"/>
New "single-visit" assessment protocol including audit, instant upgrades, safety tests and Scope of Work for weatherization	<input type="checkbox"/>	<input type="checkbox"/>
Piggyback on other renovation programs (combine with lead abatement program)		<input type="checkbox"/>

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Summary of Solutions Suggested (continued)	HTR	HTS
Split incentives: Create programs that split the savings between owner and renter	<input type="checkbox"/>	<input type="checkbox"/>
Landlords		
Develop a clear definition of the process with a single step-by-step guide		<input type="checkbox"/>
Produce standardized forms for landlord-to-tenant and landlord-to-PA communication	<input type="checkbox"/>	<input type="checkbox"/>
Develop landlord outreach program, charrettes, targeted ads, use of MRHA and property management firms	<input type="checkbox"/>	<input type="checkbox"/>
Develop ways to capture landlord contact information via tenant and lead marketing efforts	<input type="checkbox"/>	<input type="checkbox"/>
Develop energy efficient certification seal to help market rental properties	<input type="checkbox"/>	
Support legislation requiring improved energy efficiency in rentals	<input type="checkbox"/>	
Offer "one stop shopping" day for landlords to connect with lead vendors, contractors	<input type="checkbox"/>	
Tenants		
Better publicize availability of building energy-use information		<input type="checkbox"/>
Engage renters to network with other renters, offer incentives for contacts	<input type="checkbox"/>	
Try GroupOn offer with discount and timing bonus	<input type="checkbox"/>	
Conduct neighborhood promotions	<input type="checkbox"/>	
Leverage rental agencies	<input type="checkbox"/>	
Use Craig's List (or similar channels) to make program announcements	<input type="checkbox"/>	
Provide education/information to help understand energy use and costs	<input type="checkbox"/>	
Contractor's impact on program's ability to reach and serve customers		
Improve training for programs		<input type="checkbox"/>
Add diversity training and sales training	<input type="checkbox"/>	<input type="checkbox"/>
Expand efforts to establish Local Trusted Contractor (LTC) Program		<input type="checkbox"/>
Language		
Develop targeted lingual and culturally appropriate media channels	<input type="checkbox"/>	
Provide language specific collateral materials to serve non-English speaking customers	<input type="checkbox"/>	<input type="checkbox"/>

Hard-to-Reach/Hard-to-Serve Charrette Appendices

Summary of Solutions Suggested (continued)	HTR	HTS
Culture and Social Norms		
Develop culturally sensitive messages and messengers	<input type="checkbox"/>	
Mistrust (of both message and messenger)		
Improve safety messages (physical, safety from legal issues, quality of work, privacy)		<input type="checkbox"/>
Develop or communicate program ID badges for use by all program providers	<input type="checkbox"/>	
Provide program contact where children of the elderly can get information	<input type="checkbox"/>	
Be honest about cost and time commitments and point out the investment value	<input type="checkbox"/>	
Use trusted individuals (e.g. Mayor) to provide testimonials	<input type="checkbox"/>	
Use a community approach utilizing outreach through social service agencies, churches, schools, social organizations, council on aging, doctors' offices etc.	<input type="checkbox"/>	<input type="checkbox"/>
Provide local offices and/or contacts	<input type="checkbox"/>	
Implement market research to better understand causes of distrust	<input type="checkbox"/>	
Set expectations properly "See if you have one of the most efficient homes..."		<input type="checkbox"/>
Perceived Hassle Factor		
Standardize process across all PAs and provide a process map for customers to follow		<input type="checkbox"/>
Standardize collateral materials across the program	<input type="checkbox"/>	<input type="checkbox"/>
Simplify the process - use a single Account Manager (Concierge)		<input type="checkbox"/>
Provide on-line sign-up and scheduling	<input type="checkbox"/>	<input type="checkbox"/>
Enforce follow-up on drop-outs to document why they quit (and use to improve...)		<input type="checkbox"/>
Incorporate customer feedback into program improvement process		<input type="checkbox"/>
Simplify website	<input type="checkbox"/>	
Provide one common cover letter and provide assessors contact information	<input type="checkbox"/>	<input type="checkbox"/>

Post-Charette Meeting Notes July 26, 2011

Attendees: Danielle Rathbun, Marc Breslow, Penn Loh, Sam Nutter, Jacob Glickel, Lourdes Lopez, John Howat, Gabe Shapiro, Loie Hayes, Amy Vavak, Darlene Lombos Laurie Periera, Monica Ibrahim, Jan Gudell and Lyn Huckabee (via telephone)

- Tina opened the meeting by thanking all who were able to attend and letting everyone know that copies of the slides and meeting notes will be distributed to all charette participants.
- The purpose of this meeting is for NSTAR and NGRID to share the results of their post-charette discussions and begin discussing how the implementation of some solutions that can be done in the “short-term” will commence.
- The first few slides provided some background on the charette including the names and affiliation of those who attended, the objective and the overarching need for weighing costs and benefits when discussing potential strategies.
- The PAs then reviewed a couple of recommendations from the charette that were deemed to have an impact on the program and also be able to be accomplished in the near term.
- The first item discussed was the development of a clear “road map” describing the process. A copy of the Columbia Gas piece (one-page) that is sent to customers who schedule an audit was distributed to the group. This document could be used as a starting point. The premise is that the Call Center Rep. may explain the program upon enrollment and the Energy Specialist reiterates this (based on each customer’s particular circumstances) at the time of the assessment. Participants at the charette, however, felt that customers did not remember the steps included in the process and therefore suggested having a simple one-page document.
- Lourdes Lopez, of the Renew Boston Program, felt that this would be very useful. Loie Hayes of Boston Climate Action Network felt that we had a sample from Columbia and could go with that instead of investing time in revising it. Tina noted that the reason the PAs thought it may be beneficial to work with a few community group representatives is that we have heard from the outreach groups that the language used in some of the PA marketing material may not resonate with folks living in different communities. All parties agreed, however, that the language in the piece would need to be updated to reflect the new market model.
- Darlene wasn’t sure that of the suggestions raised at the charette, this (the Road Map) one would be the most effective use of time and money. Tina explained on

behalf of the PAs that specific recommendations, such as additional funding for community outreach (as was done in the CMIs), would require cost-effectiveness results from the statewide EM&V group on the pilots done so far before they could potentially move forward. Danielle agreed and reminded everyone that the purpose of a pilot is to try a strategy for a short period of time and then use the results to determine if larger-scale implementation is warranted. At this point the PAs do not have the data (CMIS are still going on) to evaluate the outreach conducted in the CMIs.

- The second recommendation discussed was for the PAs to encourage their Lead Vendors and HPCs to hire multi-lingual Energy Specialists. Sam mentioned that CSG has an on-going recruiting effort to meet this need. Recruiting is taking place both within and outside of Boston. Gabe from NSL noted that they have some bi-lingual Energy Specialists (Spanish and Vietnamese) and are continuing on with their efforts in this regard as well.
- Tina then explained how the new Landlord Coordinator position within the Renew Boston program is an opportunity to assess barriers in rental properties in “real time”. In response to the concerns raised at the charette, a PA representative will be working directly with the LC to document barriers and solutions. Case studies will also be developed for illustrative purposes. Jake informed the group that Renew Boston will be holding landlord meetings on August 13, 20 and 27 for owner-occupied dwellings.
- A separate slide discussing PA activity around pre-weatherization (wx) barriers was reviewed. Marc Breslow cited some requests from DOER on this topic. These included:
 - In addition to petitioning the DPU for the ability to finance pre-wx barriers (those directly tied to the ability to install wx measures), the DOER would also like the PAs to directly fund the low cost (to be defined) remediation efforts associated with pre-wx issues.
 - DOER is requesting that the PAs assist customers in obtaining the services needed to correct the barriers. The PA representatives explained that they do not endorse particular contractors providing these services. Tina noted that a city or community group may be able to provide an endorsement at their discretion. Danielle added that this would be an issue of potential liability for the PAs. (John Howat noted that the LI network had to take out separate insurance to cover this liability when they began including remediation of pre-wx barriers as part of the program. John further noted that resolution of pre-wx barriers is used as a marketing tool to landlords who may not necessarily be interested in energy efficiency because they do not pay the heating bills). Marc asked if the PAs would consider having their Lead Vendors and HPCs subcontract these services (like Renew

Boston is doing now) and provide them through the program. Would this resolve the PA liability issue?

- Finally, Marc had a discussion with Ken Rauseo (of the Low Income Network) to discuss the remediation steps that they take to resolve pre-wx barriers. Marc noted a couple such as putting down plastic in crawl spaces in a cellar to address moisture issues and insulating the parts of a home (i.e. attic) that do not have K&T wiring (Cellar may have it, attic may not). The PAs noted that these strategies are already used in the HES program. Marc subsequently requested that the PAs their Lead Vendors meet with Ken to determine if there are other strategies that could be implemented into the HES program.
- Marc stated that he did not feel that the DPU would be an obstacle in allowing PAs to make these changes. Danielle reminded the group that we must follow the regulatory process. Danielle further stated that she is aware (from the charette discussions) that LEAN had some minor wording changes made to the legislation that allowed them to include pre-weatherization measures. Danielle thought it might make sense for the PAs to see this language (Tina will contact Charlie H.) The group discussed the potential need for legislative changes as well as DPU approval. For example, the PAs could petition the DPU who may then say they cannot provide approval because the request is inconsistent with the law.
- Danielle asked how the new Landlord Coordinator will be trained given the complexities associated with rental properties. Staff from Renew Boston stated that a second level of training, beyond what is needed for the general outreach workers, will be needed. They may implement a Train the Trainer strategy. Amy noted that it has taken a year for those working on Renew Boston to really understand the nuances of the program. Tina stated that the learning curve may be shortened by documenting the lessons learned from Renew Boston with job aids stating how to handle frequently occurring scenarios. Jake asked if the PAs could assist in developing the training material (either via funding or labor). Tina will bring this request back to PA management.
- Returning to the topic of community outreach, Darlene asked if the other PA marketing strategies are evaluated (since community outreach is a marketing strategy). The PAs replied that marketing strategies are assessed. The need to assess the cost-effectiveness of community outreach (whether it is a separate pilot or marketing strategy for the overall program) still exists. Danielle noted that something to discuss for future planning cycles would be to integrate community representatives into the planning process for marketing (along with the PAs and DOER) as opposed to having a separate program. One example is the suggestion from community groups that PA materials not just be literally translated into multiple languages, but that additional consideration as to what would resonate best with the audience would be factored in as well.

- Penn asked about the recommendation made at the charette to “conduct a study on the potential for using tiered incentives” for the program. The PAs responded that studies fall within the realm of the EM&V group. This suggestion will be brought to their attention. The PAs cautioned that there are many evaluation projects on-going with limited funds.
- Penn raised a process question. The PAs have stated that they will look for additional opportunities to address HTR/HTS customers in the next planning cycle (2013-2015). How could the community groups get involved in that process? Tina will bring this back to the PA management staff.