

AESP “The Truth About Who Your EE Program Reaches” Breakout Group Scenario

A utility company in a Midwest state is at the beginning stages of designing a new residential program that would provide a free **Heat Pump Water Heater (HPWH)** or **Cold Climate Heat Pump (CCHP)** to income-qualified households in their territory. The utility has preliminarily decided on the following components to the program and is seeking input from the community and strategic partners before any decisions are finalized:

Income qualification: Households at or below: 80% Area Median Income; or 200% of federal poverty limit. The utility is open to including renters in the program but hasn't yet determined the details around how that customer segment would be incorporated.

Income verification: Gathering the customer's account number and using the customer's rate code to determine eligibility. Only a subset of rate codes will be eligible.

Incentive structure: The utility company plans to fund the entire project, including contractor installation costs.

Contractor involvement: The utility has an existing, dedicated trade ally network to perform installations that will need to be trained on the new program. They are open to enrolling additional contractors to participate.

Customer awareness: The utility's marketing plan is to go through existing channels (customer emails, posts on the utility's website, and mailers to their residential customers).



Customer journey:

1. Utility customers receive a communication that markets the HPWH and/or CCHP as a great new system for their home because the new technology is highly efficient and will reduce the customer's energy bills for heating, cooling, and hot water heating.
2. Since the customer cannot afford a new heating/cooling and/or hot water system, the customer is receptive to the idea and submits a quick form to have a contractor contact them about the program.
3. Once the customer receives marketing material about the program, they will need to submit a quick form (either online or via post) indicating their interest.
 - a) The form requires the customer's full name, phone number, email address (optional), home address, and utility service account number (optional).
 - b) A program-enrolled contractor then receives these leads from the utility and reaches out to the customer to schedule a consultation call or visit after the utility validates the customer's rate code.
 - c) Customers with ineligible rate codes receive email or call informing them they are ineligible to receive rebates through this program from the utility implementation team.
4. Contractor provides full at-home consultation and advises customer on whether the new technology is a viable option for their household.
5. Assuming the technology is a good fit, the customer agrees to move forward with the program, at which point the contractor draws up the full application for participation, orders the equipment, and proceeds with installation.

Example Customer Characteristics:	Example HVAC Contractor Characteristics:
Low-income	Company is minority owned and operated
Often elderly; may have mobility issues (such as going downstairs / up ladders, or cleaning exterior CCHP equipment)	Not very experienced in working with income-qualified households for these technologies; not familiar with the customer limitations they may encounter
Not familiar with new technology; may not have Wi-Fi	English is not the first language for some technicians

BREAKOUT GROUP GUIDING QUESTIONS:

Question Category	Question
Assess	<ul style="list-style-type: none"> • What are the pros and cons for installing HPWHs & CCHPs for: <ul style="list-style-type: none"> ○ customers? ○ contractors? • Based on what you know about the program design, what barriers might prevent customers from participating in the program?
Define	<ul style="list-style-type: none"> • What metrics would help track program success? • How would you collect the data to inform the metrics? • What are the barriers to different data collection methods? How would you overcome them?
Solve	<ul style="list-style-type: none"> • How can you design the program to more effectively mitigate barriers and increase participation? • Think about strategies that: <ul style="list-style-type: none"> ○ maximize participant benefits ○ include relevant stakeholders ○ rely on factors that are within the control of the utility and implementation team