Meeting purpose:
- Initiate integrated design of the CPW program

Agenda:
- Introductions
- Overview of program goals & elements
- Brainstorm key issues - ‘biggest boulders’ and ‘keys to success’
- Brainstorm lessons learned from programs here and elsewhere
- Walk through of retrofit process from homeowner & contractor perspectives
- In-depth discussion of each program element:
  - goals, what’s in place now, what’s needed, how & who to do it, by when
- Integration of different elements
- Schedule & next steps
# Program Goals

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<tr>
<th>Target</th>
<th>Importance</th>
<th>Notes</th>
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<tr>
<td>Number of homes retrofitted</td>
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<td>Energy &amp; carbon savings</td>
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<td>Jobs created</td>
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<td>% underserved homeowners served</td>
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<td>Performance on the high road agreement</td>
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<td># of contractors involved</td>
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### Community Power Works Program Elements

#### Market Research
- Segmenting the market to effectively target customers and meet multiple program goals

- Building the customer database
- Marketing Plan/Framework
- Segmentation by income, ethnicity, & education
- Segmentation by fuel type
- Segmentation by existing EE activity & connections with existing programs

#### Marketing & Outreach
- Developing & implementing a viable plan within budget parameters
- Integrating efforts with HDP outreach

- Marketing Plan/Framework
- Materials
- Program Launch
- Ongoing Outreach

#### Finance & Incentives
- Establishing service territories & seamless service delivery
- Providing support & ensuring adherence to high road

- Carbon incentive fund
- Delivery partner selection
- Orientation & Training
- Marketing support/integration
- High road agreement

#### Home Delivery Partners & Contractors
- Providing seamless service delivery and minimizing confusion with 2 models

- Call Center
- Energy Technical assistance
- Finance & program assistance
- Expert recruitment & training
- Multi-lingual materials & capacity

#### Homeowner Experience
- Establishing cost effective protocols & systems to ensure quality
- Delivering quality from the get go

- Customer satisfaction
- Post retrofit audits
- QA checks – first five
- QA checks – random
- Corrective action protocols

#### QA/QC
- Ensuring that Seattle’s needs are clearly defined and met
- Having a system up and running by program start

- Platform Specifications
- Design team representation
- Interim Solutions (if needed)
- Ongoing IT oversight & support

#### IT Platform
- Coordinating all the elements & parties involved
- Keeping within budget

- Meetings
- Ongoing program management & coordination

#### Program Management
- Design and launch in tight time frame
- Keeping within budget

- Reporting

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**Legend:**
- **Blue Box:** An example of an element within each category.
CPW Home Retrofit - Process Flow

1. **Awareness**
   - CPW Financing
   - Y/N

2. **Self Audit**
   - Y/N
   - Web contact
   - Y/N
   - EPS Audit
   - Y/N

3. **Contractor Selection**
   - Bid
   - Y/N
   - Loan agreement
   - Y/N
   - Payment to contractor
   - Y/N

4. **Retrofit**
   - QA/QC
   - Test out audit

5. **Evaluation**
   - EE Phone/web/visit assist
   - Y/N
   - Test out audit
## Schedule & Milestones

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HRC Coordination Role

OSE Enterprise Cascadia

Full Service Partners

Home Retrofit Coordinator

Homeowner Experience (flexible & Full Service)

Independent Contractors

SEIC

Marketing & Outreach

QA/QC

WEB & CRM Platform Design

Finance
**Project Schedule**

**Oct - Feb**
- **DESIGN**
  - Delivery models
  - Interactions
  - Outreach strategy
  - IT platform
  - QA protocols
  - Delivery Partners
  - Processes
  - Systems

**March – June**
- **LAUNCH**
  - Outreach campaign
  - Service delivery
  - Resident experience
  - Reality check
  - Adjustments

**June on**
- **MAINTAIN**
  - Partner oversight
  - Quality assurance
  - Tracking
  - Monitoring
  - Communication
  - Adjustments

- Homeowner Research & Analysis
- Home Delivery Partner Selection
- Contractor Pool sign ups
- SEIC
- Better Buildings

CPW PROGRAM DESIGN
- Model integration
- Service territories
- Homeowner experience systems
- Contractor support
- QA/QC

Umbrella Marketing
- Home Retrofit Services
- Coordination & Support

IT/CRM
Outreach – Behavior Change Process

- Resident becomes aware of program
- Resident understands importance of program
- Resident understands personal benefits
- Resident participates in program
- Resident is satisfied with experience
- Becomes loyal program advocate – tells others

LOYALTY  AWARENESS  UNDERSTANDING  RELEVANCE  DIFFERENTIATION  SATISFACTION
Technical Assistance and Support to Homeowners

HRC
Will provide all program branding and demand generation tools for Full and Flexible Service Models

“High Touch” Customers
- Umbrella marketing
- Delivery Partner outreach
- Delivery Partner Energy Consultants provide support
- 500-1,000 homes retrofitted

“Medium Touch” Customers
- Umbrella marketing
- HRC Energy Assistants & Energy Experts to provide support
- 500+ homes retrofitted

“Low Touch” Customers
- Umbrella marketing
- HRC Energy Assistants & Energy Experts to provide support
- 500+ homes retrofitted