

CPW Design Team 11/15/2010 Planning Meeting – Draft Agenda

- 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

	Target	Importance	Notes
Number of homes retrofitted			
Energy & carbon savings			
Jobs created			
% underserved homeowners served			
Performance on the high road agreement			
# of contractors involved			

Community Power Works Program Elements

Market Research

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

Building the customer database

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

Carbon incentive fund

Rebates

Loans

Home Delivery Partners & Contractors

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

Delivery partner selection

Orientation & Training

Marketing support/ integration

High road agreement

Homeowner Experience

- 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

Complaint Resolution

QA/QC

- 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

IT Platform

- 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

Program Management

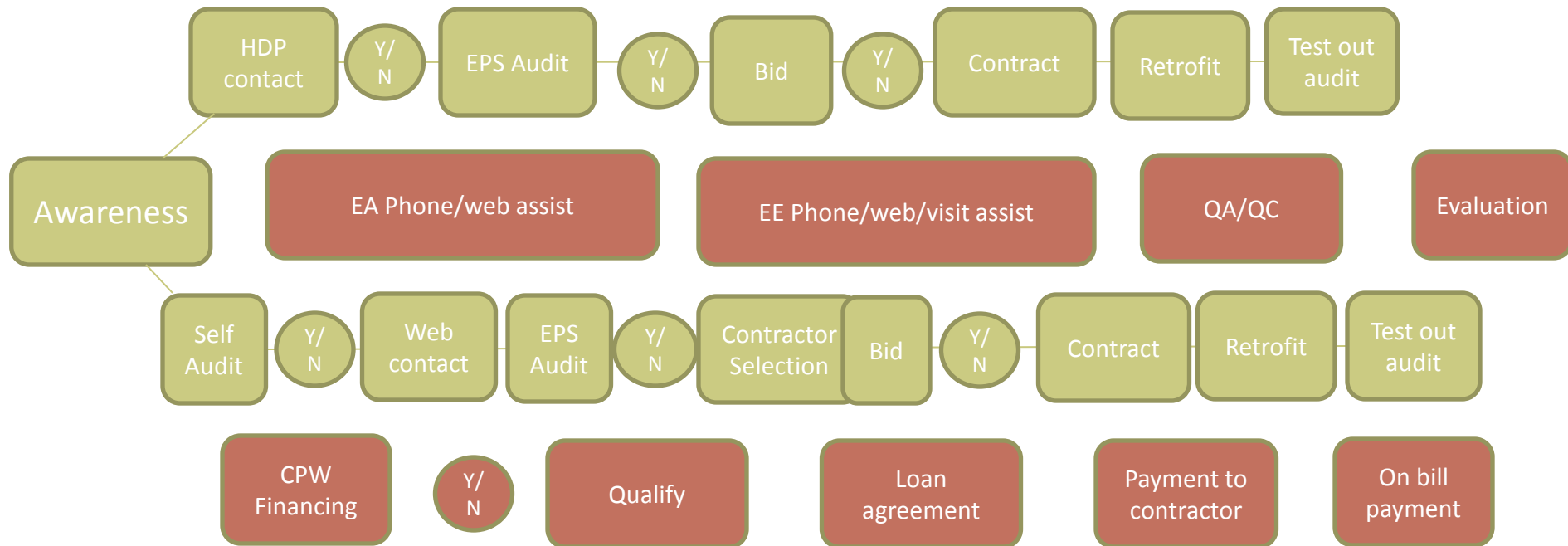
- Design and launch in tight time frame
- Coordinating all the elements & parties involved
- Keeping within budget

Meetings

Ongoing program management & coordination

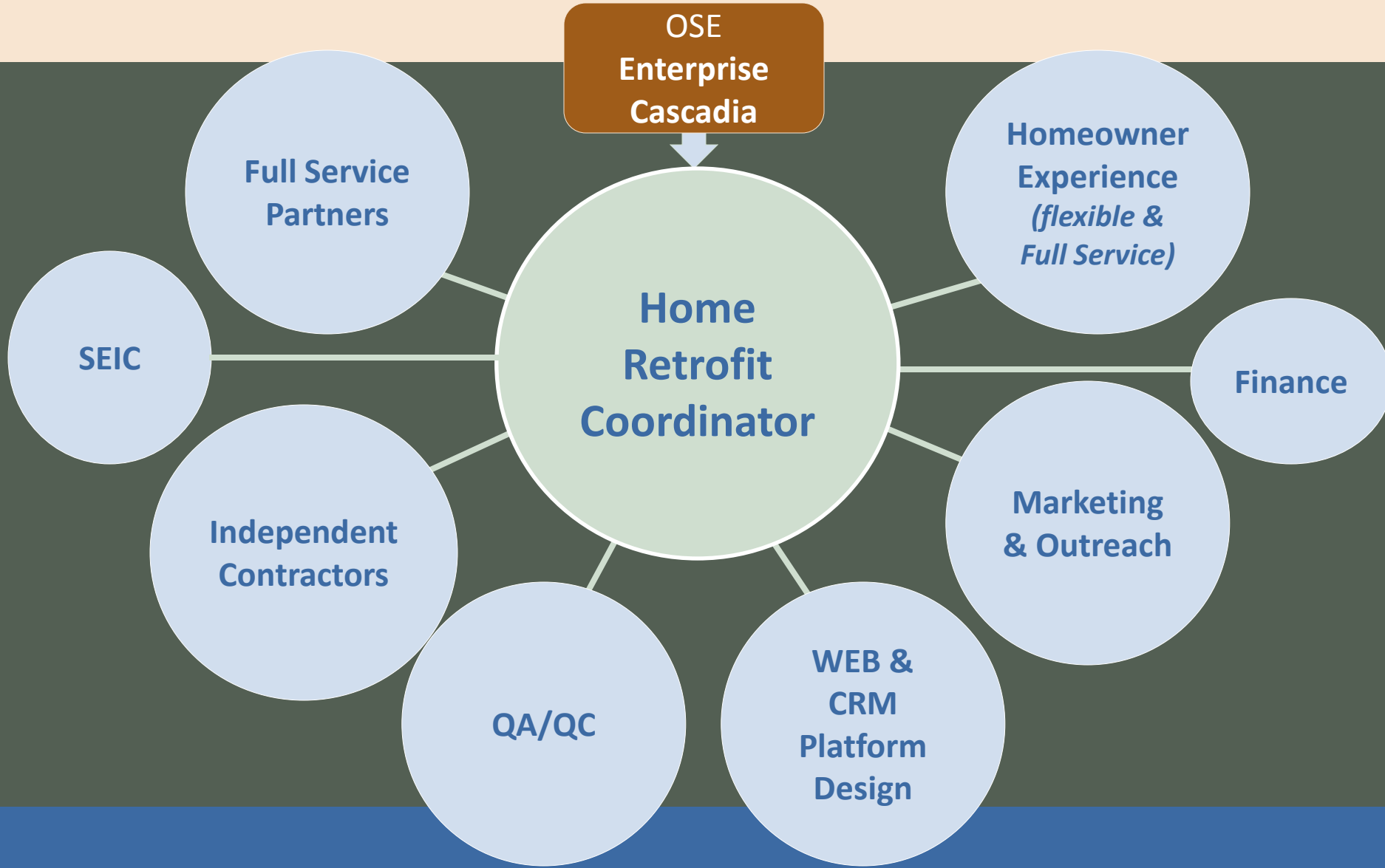
Reporting

CPW Home Retrofit - Process Flow



SLIDES FROM THE PRESENTATION

HRC Coordination Role



Project Schedule

Oct - Feb

DESIGN

- Delivery models
- Interactions
- Outreach strategy
- IT platform
- QA protocols
- Delivery Partners
- Processes
- Systems

March – June

LAUNCH

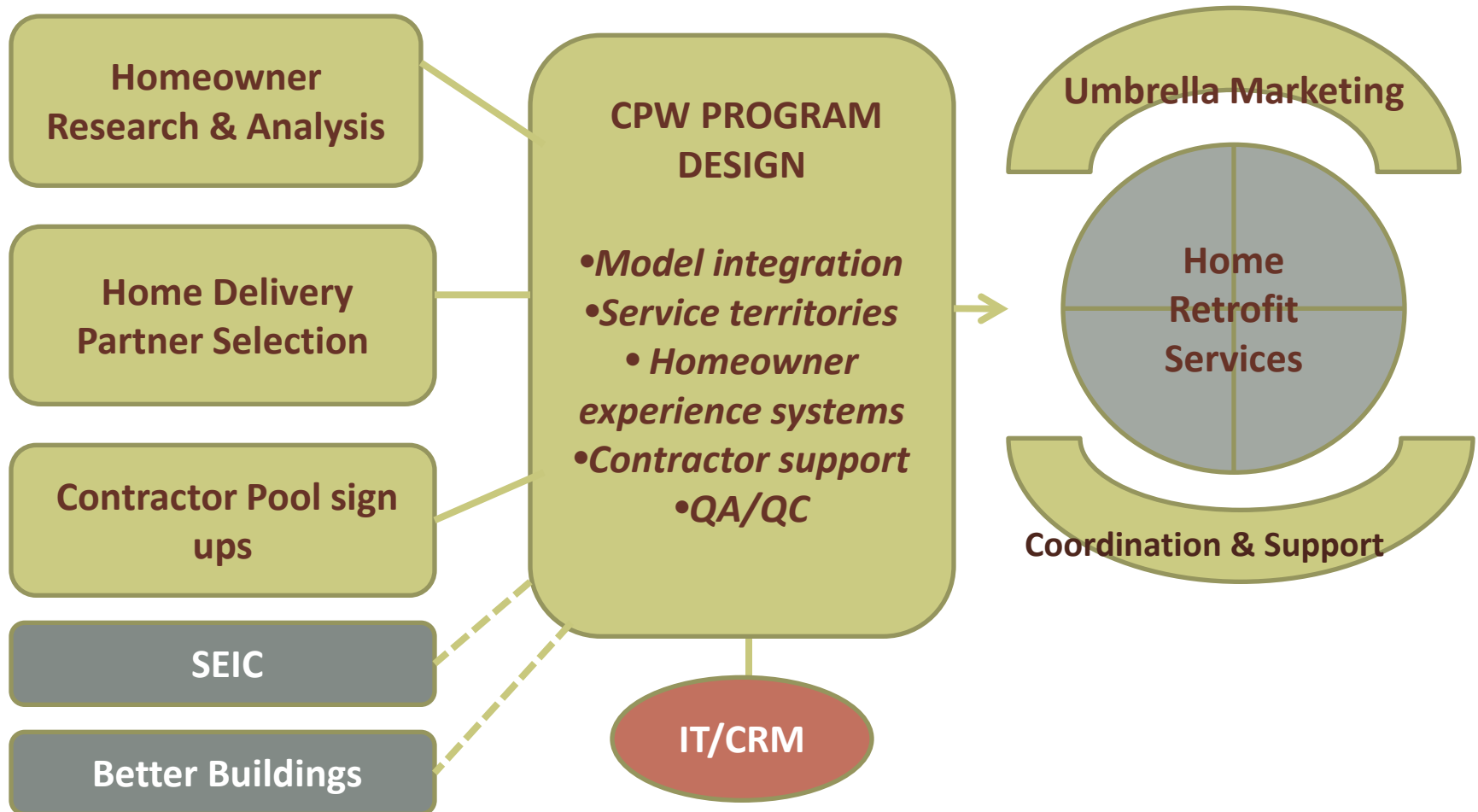
- Outreach campaign
- Service delivery
- Resident experience
- Reality check
- Adjustments

June on

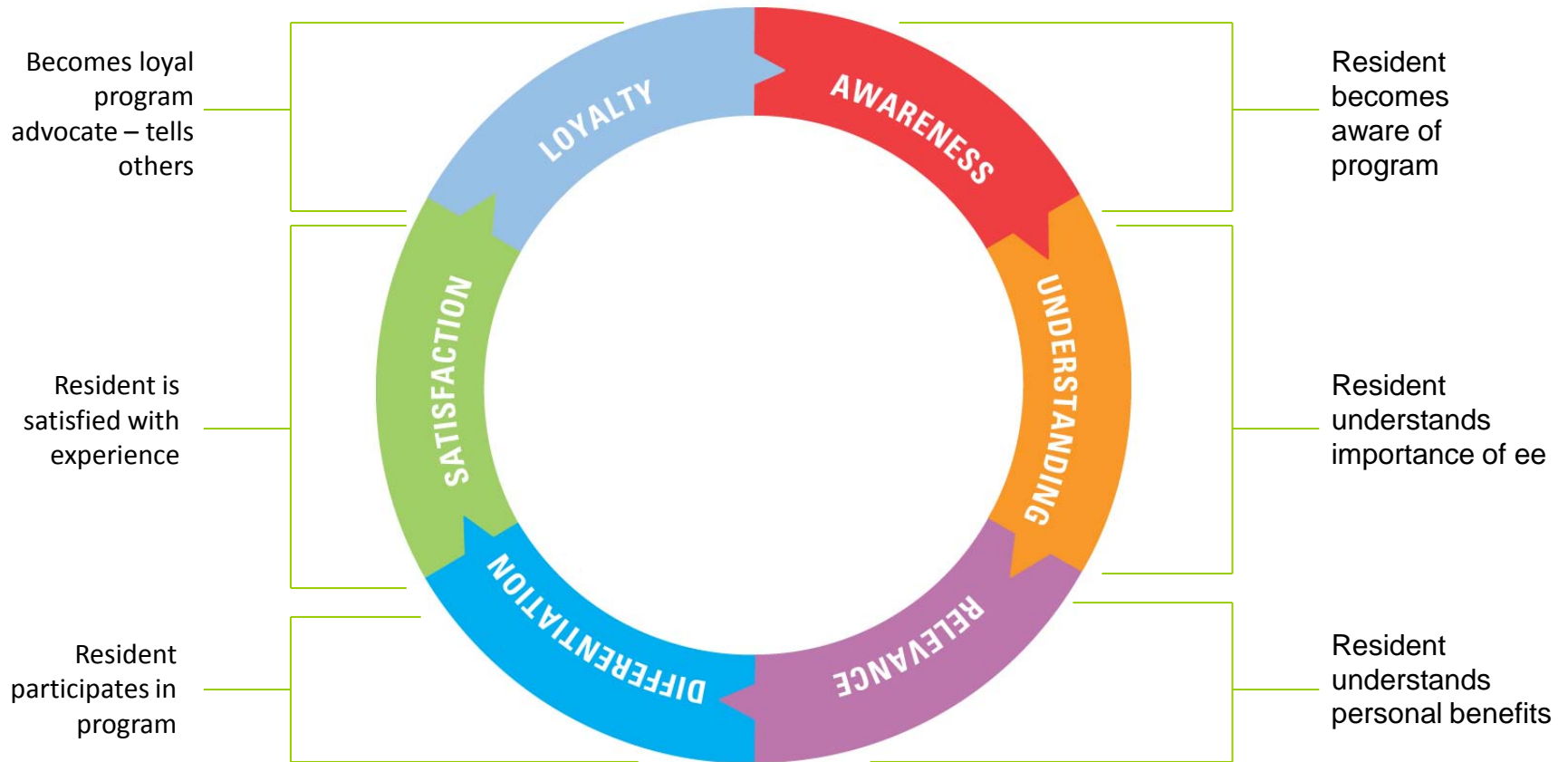
MAINTAIN

- Partner oversight
- Quality assurance
- Tracking
- Monitoring
- Communication
- Adjustments

Design – Intensive, Integrated Planning for early 2011 Launch



Outreach – Behavior Change Process



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

Team & Management Overview

OSE/ Enterprise Cascadia
Sue Taoka

Design Team
Marc, Scott,
Aaron, Ruth, Dan

Cascadia Management Team
Marc Daudon – PIC
Ruth Bell – Project Manager
Christine Grant – Project Coordinator

Outreach

**Contractor
Interface**

**Homeowner
Interface**

QA/QC

**Systems &
Support**

Ruth Bell
Julie Colehour
Bryan Cohen
John Morris

Dan Wildenhaus
Aaron Fairchild
Scott Case
Matt Abbott

Christine Grant
Dan Wildenhaus
Charlie Rogers
Energy Assistants

Dan Wildenhaus
Charlie Rogers
Matt Abbott

Marc Daudon
Scott Case
Leo Shklovskii
David Averill