**Observation about the pandemic**

* The COVID-19 pandemic restricted in-person outreach. Utilities that reported difficulties also stated they took additional pro-active measures to reach customers through other means.
* Some utilities reported conducting targeted outreach to customers with arrearages.

**Reported barriers**

* Some utilities reported not having a system in place to identify and qualify a customer as low-income or linguistically or culturally vulnerable.
* A handful of public utilities reported not having a formal process to solicit or received energy assistance program design input from prioritized communities and not tracking, evaluating, or reporting the effectiveness of their energy assistance outreach activities. Responses to other areas of the report and from conversations with other utilities suggest this is a widespread issue.

**Methods of outreach**

This is an aggregation of utility responses.

* Word of mouth
* Audio messages
  + Phone calls
  + On-hold phone messaging
  + English and Spanish radio stations
* Paper
  + Bill inserts
  + Newsletters
  + Door hangers
  + Rack cards
  + Flyers
  + Posters
  + Application packets
  + Surveys to identify potential new programs and make decisions on new program offerings
* Digital
  + Email marketing
  + Digital banners that target audiences by zip code
  + Social media
    - Twitter
    - Instagram
    - Facebook
  + Surveys to identify potential new programs and make decisions on new program offerings
* Campaigns
  + Targeted outreach to manufactured and mobile home communities
  + Customer appreciation days
  + Energy saver gifts
  + No-cost home energy assessment door-to-door
  + Small business direct install initiatives
  + Residential and small commercial assessments and free direct install
* Organized group conversations
  + Presentations
  + Workshops
  + Community roundtable events with community organizations serving low-income and vulnerable populations
  + Customer review board meetings where the board provides input on various projects and initiatives, including communications

**Places of outreach and outreach partners**

This is an aggregation of responses.

* Local organizations
  + CAP agencies
  + Food banks
  + Affordable housing providers
  + Health departments
  + Human services
  + Schools and Head Start
  + Libraries
  + Churches
  + Adult activity centers
  + Senior community centers
* Local vendors
* Movie theaters
* Movie theaters in bilingual communities
* Community events and meetings
* Web, digital, print, social outlets
* Tribes

**Steps utilities are or plan to take to reach out to low-income and vulnerable populations**

* A utility indicated it was going to rely on a low-income needs assessment
* A few utilities reported evaluating ways to reduce barriers for low income verification
* Utilize CEIP process and contacts
* Utilities that reported not having bilingual materials indicated that will evaluate and work towards offering translated communications or are doing so.
* A few utilities indicated they would utilize data dashboards
* A utility reported auto-enrolling participants in one energy assistance program into its rate reduction program.
* One utility indicated evaluating options to target promotions to areas identified as higher need or vulnerable populations.
* One utility reported working with tenants, landlords, community organizations and others to provide energy efficiency services to low-income customers in multifamily housing.
* A utility plans to implement a targeted marketing campaign that will be reported in a subsequent report
* A utility reported workshopping ads with partner agencies and agreeing with them on timeframe to run communications.
* One utility reported publishing a program handout that described how its discount is calculated and provided examples of bills with and without the discount for comparison.
* One utility reported measuring digital impressions and engagements
* One utility reported hiring a community outreach coordinator
* A utility reported relying on CAP agencies to refer LI disabled and disabled seniors to programs
* A utility said it would be looking into potential enhancements to both staff and marketing effort

# Plans to improve effectiveness

**Outreach and targeting low-income households**

* An IOU indicated that it would leverage its equity advisory group and design appropriately targeted communications based on group's feedback.
* An IOU indicated it would direct outreach to customers through paper materials and community partners and organizations.
* Multiple utilities indicated that they would work to translate their outreach materials into Spanish or other languages.
* A utility indicated that it would add a Spanish speaking translator
* Multiple utilities indicated that they would continue or begin partnering with community-based organizations (i.e., community non-profits, CAP agencies, schools, faith organizations, food banks)
* A utility indicated it would use the Environmental Health Disparities map for cumulative impact analysis.
* A utility report that it provides newspaper and radio coverage of changes in rates.
* A utility indicated it posts rates in its monthly billing and has an open-door policy for public comments at twice monthly meetings.
* A couple utilities indicated they would evaluate tracking customer satisfaction.
* One utility indicated it would use GIS maps to target vulnerable and underserved populations.
* Community-based organizations and Tribes, comprehensive enrollment for linguistics and culturally appropriate
* One utility indicated it would work toward partnerships with Tribes, and specific communication and funding raising campaigns for low-income and vulnerable populations
* Social services agencies, data shows number of folks enrolled.
* A utility indicated it would develop programs that offer immediate benefits.
* A utility indicated it had data that showed under-enrollment in underserved geographic areas within its service territory, develop targeted marketing campaign.
* A utility indicated that it would continue its newsletter and review billing comments.
* A utility indicated it had no financial or socioeconomic info and would rely on third parties for outreach.

**Targeting and outreach effectiveness to low-income, high energy burdened customers**

* One utility mentioned it did not have readily available data to prioritize high energy burden customers
* One utility reported conducting an energy burden assessment and can now target high burden customers utilizing this data.
* One utility reported targeting energy efficiency and assistance programs to zip codes with highly impacted communities or high burden customers.
* One utility said it may use service territory maps and census data tracts relate to identify low-income customers
* A utility reported it would conduct member surveys and work with CAPs

# Observations from outreach and targeting effectiveness data

* As a group, utilities struggled to provide demographic data for their service territories.
  + Utilities that were able to provide data often had done extensive in-house data analysis or had contracted with a consultant to do the analysis.
  + Other utilities attempted to provide data from the DOE LEAD Tool or directly from Census data
  + Utilities with overlapping service territories reported having a hard time disaggregating DOE LEAD Tool and Census data for their particular service areas.
  + A large portion of the reported low-income data did not include the measurement (AMI or FPL), making it hard to glean a state wide analysis.
  + Utilities whose service areas did not overlap with county boundaries struggled to report clean data.
* As a group, utilities struggled to provide demographic data for their programs.
  + Utilities that were able to provide data often had conducted extensive in-house data analysis or contracted with a consultant to do the analysis.
  + A handful of utilities were able to provide the data without such extensive analysis—i.e., Cowlitz, City of Chewelah.
  + Utilities who did not do any analysis in-house or contract out for an analysis and whose service areas did not overlap with county boundaries struggled to report clean data.

# Observations from responses to underserved areas and geographic equity questions

* Some utilities were able to map program participation and energy assistance need.
  + One program with extensive in-house data tools was able to report that its programs were successfully targeting highly impacted communities and vulnerable populations
* Utilities generally reported that rural areas and renters were likely underrepresented in their programs.
* One utility reported Spanish speakers as having lower than expected participation rates.
* A few utilities noted having lower than expected participation from Tribes.
* Most utilities reported having no geographic data.
* One utility reported using an equity index as an interactive tool to highlight disparities in its service territory.