



KeySpan Gas East Corporation d/b/a National Grid
("KEDLI")

Home Energy Affordability Team ("HEAT")
Transition Plan

Cases 23-G-0226 and 18-M-0084

December 20, 2024

Contents

- Introduction and Objectives 3
 - Introduction 3
 - Objectives 4
- Program Overview 4
 - KEDLI HEAT 4
 - EmPower+ 5
 - EmPower+ Eligibility Guidelines..... 6
 - REAP 6
- Transition Plan 7
 - Timeline of Marketing Communications and Outreach 7
 - Customer Communications..... 8
 - Stakeholder Communications..... 9
 - Referrals 10
- Reporting and Performance Metrics 10
- Appendix A: KEDLI HEAT Transition Visual Timeline..... 12
- Appendix B: Best Practices and Lessons Learned from KEDLI HEAT 13
 - Best Practices 13
 - Lessons Learned 15

Introduction and Objectives

Introduction

KeySpan Gas East Corporation d/b/a National Grid (“KEDLI” or “National Grid”) submits this Home Energy Affordability Team (“KEDLI HEAT”) Transition Plan in accordance with orders of the New York Public Service Commission (“PSC”) in Case 18-M-0084,¹ and Cases 23-G-0225 and 23-G-0226.² In the July 2023 NE:NY Order, the PSC directed the New York State Energy Research and Development Authority (“NYSERDA”) to be the statewide program administrator for low- and moderate-income (“LMI”) programs serving the 1-4 family homes segment.³ In the Order Approving Joint Proposal, KEDLI committed to develop a plan in consultation with NYSERDA and Department of Public Service Staff (“Staff”) to transition the KEDLI HEAT program to NYSERDA and to file that plan no later than January 1, 2025.⁴

The proposed transition provides for National Grid to close the KEDLI HEAT program by December 31, 2025. Concurrently, NYSERDA’s EmPower+ program, will expand to serve eligible gas customers located in KEDLI’s service territory through its standard program offering.

The KEDLI HEAT program is currently aligned with NYSERDA’s EmPower+ program in many ways, but KEDLI HEAT will continue to work with NYSERDA to implement a formal transition timeline to avoid a gap in program service availability for Long Island gas customers, as outlined in this plan.

¹ Case 18-M-0084 *et al.*, *In the Matter of a Comprehensive Energy Efficiency Initiative* (“NE:NY Proceeding”), Order Directing Energy Efficiency and Building Electrification Proposals (July 20, 2023) (“July 2023 NE:NY Order”).

² Cases 23-G-0225 and 23-G-0226, *Proceeding on Motion of the Commission as to the Rates, Charges, Rules and Regulations of The Brooklyn Union Gas Company d/b/a National Grid NY and KeySpan Gas East Corporation d/b/a National Grid for Gas Service* (“KEDLI Rate Case”), Order Approving Terms of Joint Proposal and Establishing Gas Rate Plans, with Minor Modification and Corrections (August 15, 2024) (“Order Approving Joint Proposal”).

³ July 2023 NE:NY Order, p. 51.

⁴ Joint Proposal § IV.11.10.5, p. 92; and Order Approving Joint Proposal, p. 136 (“KEDLI must use reasonable efforts to complete all HEAT projects by the end of 2025, when the project will be transferred to NYSERDA. By January 1, 2025, KEDLI will, with NYSERDA and DPS Staff, develop and file with the Commission a transition plan addressing customer outreach to inform affected customers of the transfer of responsibility for programs equivalent to the HEAT program to NYSERDA, planned periods reporting, processes to limit or avoid gaps in program offerings and a timeframe for completing HEAT projects beyond 2025, if applicable”).

Objectives

To ensure a smooth transition from KEDLI HEAT to EmPower+, objectives for this transition include:

- Ensuring there is no gap in service when an LMI 1-4 family customer cannot apply to an active program.
- Coordinated outreach direct to customers between NYSERDA and National Grid to inform them of the transition, educate them on what program to apply for at any given time, and encourage them to participate in EmPower+.
- Coordinated communication from NYSERDA and National Grid to community stakeholders to inform them of the transition process and keep them aware of what programs are available to LMI 1-4 family customers.
- Completing all active KEDLI HEAT projects by December 31, 2025.

Program Overview

KEDLI HEAT

The KEDLI HEAT program provides a no-cost home energy assessment (“HEA”) to existing income-eligible one-to-four family homes with natural gas service located in the KEDLI service territory. The HEA includes a home health and safety survey and identifies energy efficiency opportunities, develops a scope for follow-on work when appropriate, and implements direct install (“DI”) measures. Eligible gas measures include faucet aerators, pipe insulation, low-flow showerheads, weatherization services such as shell insulation and air sealing, and repair or replacement of gas space and water heating equipment. KEDLI HEAT also may mitigate minor health and safety deficiencies that coincide with the installation of energy efficiency measures. The benefits of KEDLI HEAT are lower energy bills, increased comfort, and low-to-no cost home energy efficiency upgrades for low-income customers.

KEDLI HEAT Eligibility Guidelines

Low- and moderate-income homeowners and renters residing in residential buildings with 1-4 units may be eligible. Eligibility is determined based on the income of the household or account holder.

Low-income customers are defined as having a household income of less than 60 percent of the New York State Median Income (“SMI”). Moderate-income customers are defined as having a household income of 61% to 99% of Area Median Income (“AMI”) and are accepted into the program in one of three tiers, based on the ranges within the AMI for the KEDLI service territory.

Incentive Tier	Area Median Income	Low End of Income Range	High End of Income Range	National Grid Incentive	Incentive Description
Low-Income	≤60% (SMI)	N/A	\$58,111	100%	No cost HEA with DI measures, 100% total cost of approved work scope.
Moderate-Income Tier 1	>61% – 70%	\$ 58,112	\$ 66,685	75%	No cost HEA with DI measures, 75% total cost of approved work scope with a 25% cost share to account holder or landlord. The account holder is responsible for any costs proposed above cap.
Moderate-Income Tier 2	>71% – 80%	\$ 66,686	\$ 76,212	50%	No cost HEA with DI measures, 50% total cost of approved work scope with a 50% cost share to account holder or landlord. The account holder is responsible for any costs proposed above cap.
Moderate-Income Tier 3	>81% - 99%	\$ 76,213	\$95,264	25%	No cost HEA with DI measures, 25% total cost of approved work scope with a 75% cost share to account holder or landlord. The account holder is responsible for any costs proposed above cap.

The implementation contractor, CLEAResult, will provide participants with a limited one-year warranty on measures installed through the program. Any issues after one year from the date of the installation are the responsibility of the participant. Any problems should be directed to CLEAResult at (844) 375-4328.

EmPower+

The EmPower+ program is administered statewide by NYSERDA in close coordination with PSEG-LI and the Weatherization Assistance Program (“WAP”), Home Energy Assistance Program (“HEAP”), and local housing programs to optimize the deployment of clean energy investments in the program from multiple funding streams, including the Clean Energy Fund (“CEF”), New Efficiency: New York (“NE:NY”), Regional Greenhouse Gas Initiative (“RGGI”), HEAP, State and Federal sources. LMI customers can access EmPower+ through a single application available both online and in printable form, and the program is open to homeowners and renters of 1-4 family buildings in New York State.

Through EmPower+, eligible New Yorkers can receive:

- No-cost comprehensive home energy assessments to pinpoint where energy and dollars are being wasted and receive a customized plan to lower energy usage.

- No-cost direct install improvements identified during the assessment which can be installed by participating program contractors.
- Funding toward the cost of energy efficiency improvements, including air sealing, insulation, some heating systems, heat pump water heaters, and electrical service and wiring upgrades.

EmPower+ Eligibility Guidelines

Low-income households at or below 60% of State Median Income are eligible to receive up to \$10,000 per project.

Moderate-income households between 60% and 80% of Area Median Income are eligible to receive up to \$5,000 per project. Moderate-income households may also be eligible for low-cost financing of energy upgrades through the Green Jobs – Green New York (“GJGNY”) Program.

National Grid KEDLI LMI customers will be eligible for EmPower+ measure offerings at the time of transition.

REAP

The Long Island Power Authority (“LIPA”) provides service to customers under the PSEG Long Island (“PSEG-LI”) brand name. PSEG-LI maintains their own program offerings for income qualified customers. EmPower+ and KEDLI HEAT participants are encouraged to coordinate with PSEG-LI LMI programs, where applicable, including the Residential Energy Affordability Partnership (“REAP”) Program.

The KEDLI HEAT program currently maintains a collaborative referral process with PSEG-LI REAP. For example, when an energy specialist conducts a HEA in KEDLI HEAT, they will suggest customers apply also for REAP services covered under the PSEG-LI program, and likewise REAP energy specialists will inform REAP participants with natural gas service about the KEDLI HEAT program. REAP energy specialists also request help from KEDLI HEAT for participants with gas appliances or additional weatherization needs.

For EmPower+ participants on Long Island, to avoid instances of double dipping of measure incentives, Participating Contractors are instructed to provide a copy of PSEG-LI approved workplan and incentives received when seeking approval for EmPower+ program work scopes and incentives.

Additional information about REAP can be found on PSEG-LI’s website.⁵

Transition Plan

Timeline of Marketing Communications and Outreach

The transition will occur throughout 2025. NYSERDA will begin taking applications for Long Island gas customers in EmPower+ beginning November 1, 2025, the “Transition Date”. The last applications for LMI customers in KEDLI HEAT will be taken by National Grid on October 31, 2025, to allow projects to finish by the end of December 2025. National Grid intends to close out all KEDLI HEAT projects in 2025, as required under the KEDLI/KEDNY Joint Proposal.⁶ If a project cannot be completed by December 31, 2025, KEDLI HEAT will encumber the funds associated with the project to be spent by March 30, 2026.⁷ More detailed steps of the timeline can be found in Appendix A. In addition to the transition timeline outlined below, best practices and lessons learned from implementing KEDLI HEAT are provided in Appendix B. Table 1, below, lists National Grid’s planned transition marketing and communications activities, associated timeline, and modes of communication:

National Grid Led Marketing Activity	Timeline (CY 2025)	Communication Medium
Last Direct Marketing Campaign (regular KEDLI HEAT marketing)	Q1	Text/Mailing
“Transition Date” Marketing	Q2	Email/Text/Mailing
“Transition Date” Reminder	Q3	Email/Text
Transition Communications	Q4	Mailing
CBO Communication	Q2/Q3/Q4	Mailing
NY Energy Advisor Communication	Q3	Meeting
Clean Energy Hub	Q2/Q3/Q4	Email/Text from Leads
PSEG-LI	Q2/Q3/Q4	Email

⁵ <https://www.psegliny.com/myaccount/customersupport/financialassistance/reap>

⁶ The Joint Proposal directs National Grid to use reasonable efforts to complete all HEAT projects by the end of calendar year 2025.

⁷ For a description of encumbered spend and committed energy savings reporting see *CE-10 Data Dictionary and Scorecard Guidance, Version 1.0*, New York State Department of Public Service – Office of Markets and Innovation (dated December 16, 2021).

Customer Communications

Target audiences for regular KEDLI HEAT program marketing include all Long Island Gas Energy Affordability Program (“EAP”) customers and potential LMI customers sourced through purchased data, which total approximately 177,000 customers. National Grid will notify customers of the transition of KEDLI HEAT and begin to include information about EmPower+ on its “Transition Date” marketing materials in Q3 2025 to increase brand recognition of NYSERDA and their program among customers. As program marketing continues, “Transition Date” reminders will be included to keep customers aware of the KEDLI HEAT application deadline. In the Q4 2025 “Transition Communications”, more information about EmPower+ will be included in direct-to-customer marketing materials, with information on how to apply beginning November 1, 2025. For marketing materials that focus on the transition of program offerings and where customers may apply, the target audience will include approximately 14,000 KEDLI EAP customers. This target audience was selected to ensure EmPower+ application and project volumes remain steady while minimizing initial spikes that could overwhelm program and contractor capacity and create delays for customers.

The forecasted pipeline of customers that may apply to the EmPower+ program in November and December 2025 by income tier are presented in the table below. This forecast is based on historical trends and the expectation that there will be no additional direct customer marketing for KEDLI HEAT beyond Q3 2025. National Grid and NYSERDA anticipate conducting joint transition communications in Q4 2025 when KEDLI HEAT closes for new applications and EmPower+ begins accepting Long Island gas customer applications.

Income Tiers	November	December
Low-Income	17	14
Moderate-Income Tier 1	13	11
Moderate-Income Tier 2	3	2
Moderate-Income Tier 3	5	4
Total	38	31

National Grid will direct customers to EmPower+ during this transition using the following sources:

- KEDLI HEAT’s Implementation Contractor, CLEAResult, will keep the KEDLI HEAT specific phone number and email open until March 31, 2026, so that customers are clearly directed to NYSERDA’s EmPower+ program.
- National Grid will update the KEDLI HEAT web page explaining that effective November 1, 2025, the program transitioned to NYSERDA’s EmPower+ Program

and will refer customers to EmPower+ with a link to the program on NYSERDA's website.

- National Grid will retire the KEDLI HEAT web page effective March 31, 2026.

KEDLI HEAT Tier 3 moderate-income customers will not be eligible for EmPower+ after the transition, due to EmPower+ income eligibility guidelines as described above; however, they will be eligible for National Grid's and NYSERDA's Market Rate programs expected to be offered in the KEDLI service territory. As described in KEDLI's November 1, 2023, Downstate New York NE:NY Proposal, National Grid is planning a residential weatherization program that may serve KEDLI HEAT Tier 3 moderate-income customers, and NYSERDA expects to continue to offer IRA Home Energy Rebates via Comfort Home in the KEDLI region beyond January 1, 2026 for as long as the IRA funding is available.⁸ More details on the market rate offerings are expected to be available pending the guidance from the Commission in a forthcoming Energy Efficiency/ Building Electrification order expected early 2025.

Stakeholder Communications

Stakeholder communications for this transition will inform stakeholders of the transition plan process, the timeline, what will be done to market the transition, as well as what EmPower+ entails. The below statements outline planned outreach to the identified non-customer stakeholder groups:

- Regional Clean Energy Hubs - National Grid will communicate quarterly with the Clean Energy Hubs to remind them that the KEDLI HEAT Program is transitioning to EmPower+. This means that the Clean Energy Hubs will be able to direct customers to the most appropriate program for their needs.
- Community Based Organizations - National Grid will communicate quarterly with Community Based Organizations to remind them that the KEDLI HEAT Program is transitioning to EmPower+.
- KEDLI HEAT Sub- Contractors/EmPower+ Participating Contractors:
 - CLEAResult will communicate with their KEDLI HEAT sub-contractors directly about all changes.
 - NYSERDA will host webinars to inform KEDLI HEAT sub-contractors and other interested parties of the EmPower+ program and how to participate as a contractor.
 - EmPower+ program staff will look to onboard any new contractors prior to January 1, 2026.

⁸ NE:NY Proceeding, Proposal of Brooklyn Union Gas Company d/b/a National Grid NY and the KeySpan Gas East Corporation d/b/a National Grid for Market-Rate Energy Efficiency and Building Electrification Programs (filed November 1, 2023), p. 12.

- NYSERDA will also include communications to interested parties through its bi-weekly program announcements and notifications on the EmPower+ Contractor Support site.
- NY Energy Advisor website - NYSERDA and National Grid will meet jointly with the Energy Advisor team to review updates and changes needed to be reflected effective November 1, 2025.

Referrals

When the administration of gas incentives for the LMI 1-4 Family market segment on Long Island transitions from National Grid to NYSERDA in 2026, National Grid will begin making customer referrals to NYSERDA for the EmPower+ program. This process will mirror the process currently used for referrals to EmPower+ in other National Grid service territories, focusing on referring high usage customers to the weatherization services they may benefit from.⁹ National Grid will upload 400 high usage Long Island Gas Customer referrals monthly to NYSERDA's portal beginning in Q1 2026.

National Grid and NYSERDA will coordinate to implement a bi-directional customer referral and project coordination process between EmPower+ and National Grid's Weatherization Health and Safety program as mentioned in the Weatherization Health and Safety Implementation Plan.¹⁰ This coordination process is intended to address health and safety issues preventing customers from participating in EmPower+. NYSERDA will refer those customers to National Grid's Weatherization Health and Safety Program.

Reporting and Performance Metrics

KEDLI HEAT program performance and its transition out of the market will continue to be reported in existing LMI energy efficiency reporting as follows. The updated plan for this program is represented in the Statewide Low- to Moderate-Income Portfolio Implementation Plan.¹¹ Performance for this program is reported in the quarterly Clean Energy Dashboard scorecard reports and in the Statewide Low- to Moderate-Income Portfolio Annual Reports.¹² The Clean Energy Dashboard scorecard report expected to

⁹ NE:NY Proceeding, Statewide Low- to Moderate-Income Portfolio Implementation Plan (filed Nov. 1, 2024), p. 64

¹⁰ Order Approving Joint Proposal, p. 93.

¹¹ The latest LMI Implementation Plan, version 5, was filed December 20, 2024, in Cases 18-M-0084 (NE:NY Proceeding) and 14-M-0094, *Proceeding on Motion of the Commission to Consider a Clean Energy Fund*.

¹² The latest Clean Energy Dashboard Scorecard was the Q3 scorecard, filed November 25, 2024, in the NE:NY Proceeding and Case 15-M-0252, *In the Matter of Utility Energy Efficiency Programs*. At the time of this filing, the most recent LMI Annual Report was filed April 3, 2024, in the NE:NY Proceeding and Case 14-M-0094. The next Annual Report to review program year 2024 performance is expected to be filed April 1, 2025.

include final KEDLI HEAT program activity is anticipated to be filed by February 27, 2026 and the 2025 LMI Annual Report containing final KEDLI HEAT data is expected to be filed by April 1, 2026. If any projects cannot be completed by the end of 2025, National Grid would encumber and commit the associated funds and energy savings, respectively, in the Clean Energy Dashboard. This process would follow guidelines to be provided by Staff with the upcoming Energy Efficiency/Building Electrification Order; and if reporting is required, it will be determined at that time.

Metrics included in these reports include:

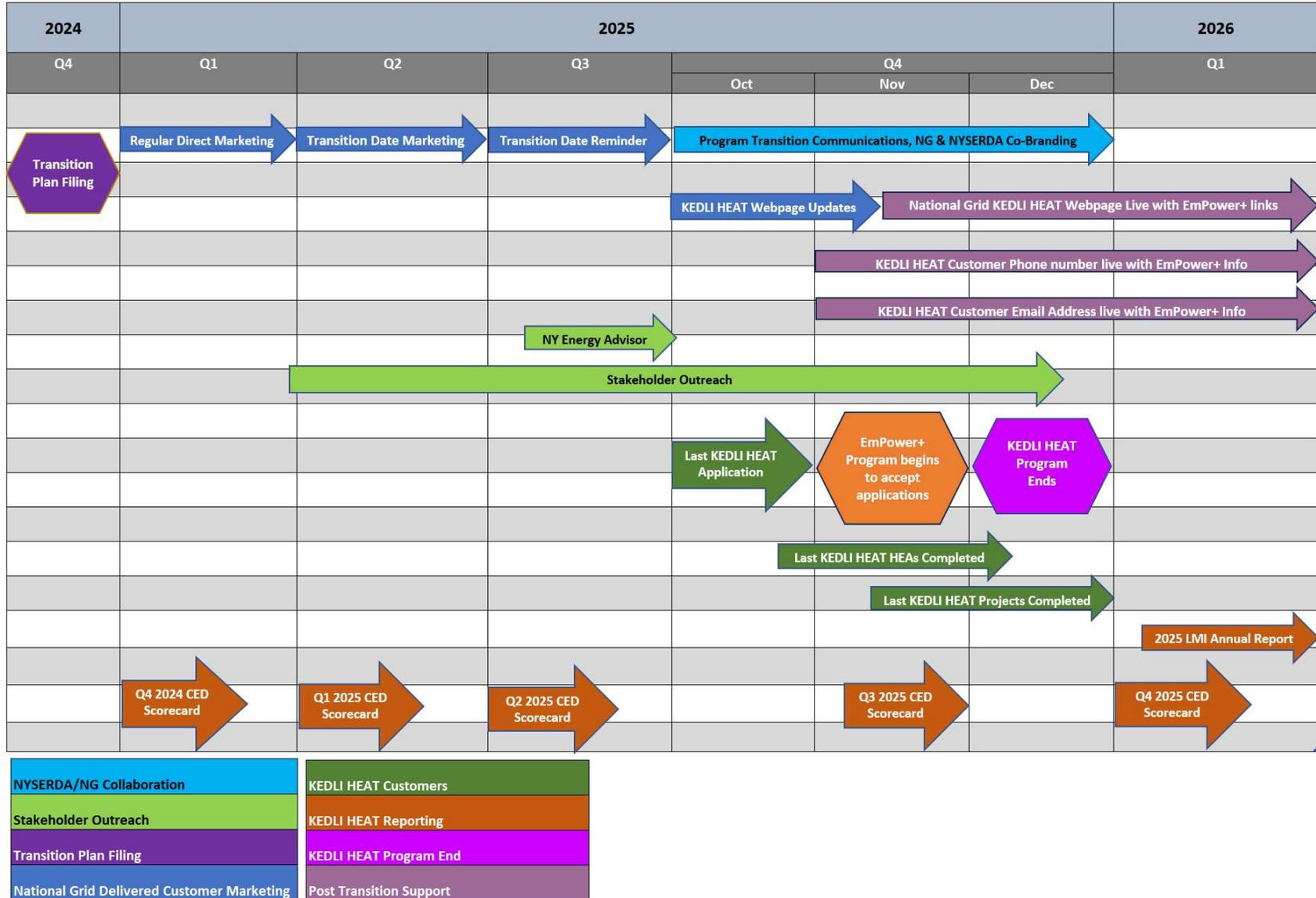
- Incentives and services and implementation expenditures.
- Total Gross annual natural gas savings (MMBtu) acquired.
- Average program effective useful life (EUL).
- Participants acquired.
- Natural gas savings (MMBtu) broken out by measure.
- Planned incentives and services and implementation budgets.
- Planned natural gas savings (MMBtu).

The KEDLI HEAT program is also actively undergoing a program process and impact evaluation study. The final report is expected to be filed in Q4 2025, and National Grid will share any additional lessons learned about serving the LMI 1-4 family homes market segment with NYSERDA when it is available.¹³

Post-transition reporting in KEDLI's territory will follow standard EmPower+ reporting requirements as designed and approved through the anticipated Clean Energy Fund 2.0 Order.

¹³ This report will be filed under Matter 16-02180: In the Matter of Clean Energy Program Evaluation, Measurement and Verification ("EM&V").

Appendix A: KEDLI HEAT Transition Visual Timeline



Appendix B: Best Practices and Lessons Learned from KEDLI HEAT

Best Practices

Category	Task/Issue Name	Problem/Success
Marketing	Program awareness	National Grid is responsible for marketing to customers. If the marketing collateral is not disseminated in accordance with the schedule, HEA participation declines. Text messages have been proven to be fruitful for customer acquisition.
	Website	Having a clear, succinct website that outlines income eligibility and what the customer can potentially gain from participation has been valuable. Having the vanity URL to provide customers with a simple website is helpful to point customers in the right direction.
	Coordinated outreach	<p>Coordinating outreach with local agencies and neighboring utilities to foster customer trust and the ability to connect with customers that may not engage with National Grid alone. Just a few examples of our successful partnerships are:</p> <p>Margert Community Corporation collaborates on weatherization work scopes in order to provide robust whole house services for participants in Far-Rockaway - Queens.</p> <p>Community Development Long Island (CDCLI) - Increased opportunities for collaboration through expanded program offerings for income eligible residents.</p> <p>PSEG-LI has continued to refer potential participants to the program for assistance.</p>
Contact Center	Reminder Calls - 48 hours ahead of appt	Reminder calls made to the customer 48 hours in advance of the HEA appointment, and when a sub-installer will be coming to perform follow on work, refreshes the customer memory of the appointment and allows for the Contact Center to schedule another if there is a cancellation.
	Check for past participation	Ensuring that past participation is checked prevents scheduling with an unqualified customer and reduces cancellations. Past Participants can inquire if further assistance is available. Inquiries are reviewed for appropriateness.
	Having a 'priority list'	Customers that identify as having a flexible schedule are targeted for last minute cancelations or fillers.

	Auditor Hotline	An Auditor Hotline used specifically for last minute cancelations and/or schedule needs in the field allows direct access from the Field to the Contact Center to communicate in real-time.
	Optimized scheduling	Scheduling customers according to township and/or neighboring communities allows for more HEAs to be completed in the day.
Customer Experience	HEA to Follow-On	Customers experience a seamless process from HEA to Follow-On Project as they are provided expectations from the initial call with the Contact Center to the completion of the project with a subcontractor.
Field Activity	Work scope review	Work scopes are developed at the time of the HEA and passed onto the subcontractor for approval.
Record Keeping	Data review	Data is QA'd through a two-check process to ensure all invoices, customer paperwork, subcontractor paperwork, and site data information are recorded accurately.
	Forecasting	Tracking the Rolling Forecast allows both teams to modulate the schedule and marketing activity as appropriate, based on capacity.
Systems	Savings review	The coordinated effort between National Grid and CLEARResult to ensure that enough site data is captured to meet the needs of National Grid and calculate TRM savings where necessary.
Subcontractors	Quality Control - first five (5) visits	CLEARResult is on-site for the first 5 visits of any new subcontractor on the program. The 10% QA/QC goals are maintained with additional as needed if concerns are identified.
	Quality Control at same time as Follow-On Project	CLEARResult aims to perform QA/QC visits with the subcontractor to minimize disruptions to the customer.

Lessons Learned

- **Adding a tiered moderate-income incentive structure:**
 - The moderate-income tiered incentive structure is a 3-tiered system intended to assist applicants above NYS HEAP income guidelines but below AMI market rate. To date, approximately 72% of moderate-income participants served through this program were in Tier 1, receiving incentives that covered 75% of the work scope costs. This demonstrates that the program was directing assistance to where it was needed most within the moderate-income segment. It additionally demonstrates that the drop in incentives covered from low-income customers to moderate-income customers, 100% to 50% cost covered, may be too steep of a drop in incentives to maintain moderate-income participation. Timelines for moderate-income projects generally took longer than low-income projects as customers often needed time to secure funds for their cost share portion of the work scope.
 - Initially, this tiered moderate-income incentive structure was offered to previous program applicants who were over the low-income threshold, and therefore couldn't participate. This testing period pipeline yielded 75 moderate-income participants in calendar year ("CY") 2022 (the incentive structure launched in spring 2022). In the summer of CY2023, the moderate-income incentive structure began to be marketed through a promotional text campaign. This campaign launched with five text waves between June and September, reaching over 68,000 customers. In addition, nearly 30,000 postcards were mailed to customers without a cell phone number on file. This increased participant counts to a total of 243 for CY2023. To date, there have been 267 participants in CY2024.
- **Customer intake, application, and income qualification:** Leading customer intake with a phone conversation ensures a streamlined customer experience. Customers are prompted via marketing outreach such as text messaging, email, and mailed postcards to reach out to the implementation vendor for an initial screening. Through this initial screening, the customers can find out more about the program. Meanwhile, the implementation vendor can pre-screen for income qualifications and gauge a customer's willingness to participate in the program. The customer completes the program application with the auditor at the time of the home energy assessment.
- **Implementation model:** This program is implemented through a single implementation vendor that performs home energy assessments, develops the work scopes, and may employ various sub-contractors to support follow-on energy efficiency measure installation. This mitigates the ability of installation contractors to inflate work scopes. Engaging a single implementation vendor to act as an aggregator and hold contracts with sub-contractors reduces administrative burden and potential liability issues for the program administrator.

- **Marketing approaches:** Text messages are an effective form of customer outreach. The strategy of highlighting a single measure that customers can easily understand and relate to has been successful in driving participation in the program. The program began utilizing this strategy in the spring of CY2023 with the Clean and Tune campaign. Over 14,500 texts were sent, yielding 85 participants. In the fall of 2023, the text campaign was repeated and over 104,000 texts were sent, yielding 1,036 interested customers and 491 program participants. To date, the fall 2024 campaign has delivered 242 program participants with nearly 103,000 text messages scheduled to be delivered.
- **Regularly scheduled program updates:** Weekly reporting and check-ins between CLEAResult and National Grid ensures both teams are aligned and aware of program milestones, successes, and issues.
- **Simplifying program operations (follow-on work):** Enlisting a small, local network of sub-contractors that are motivated to stay with the program and increase participation through established connections in partner agencies and customer referrals has proven beneficial to the program.
- **Capture customer case studies:** Customer case studies provide a holistic view of the follow-on project which allows the team to establish best practices in common and unique scenarios.
- **Treat each household individually:** For example, in older homes, prioritize weatherization measures, such as air sealing and insulation measures. For homes with more household members, encourage the use of hot water measures such as efficient showerheads and aerators.
- **Utilize Community Based Organizations:** Having local staff that understand the community needs and assistance for vulnerable customers fosters trust and confidence in the program. CBOs increase customer awareness of available programs.