



CITY OF WATERTOWN

Environment & Energy Efficiency Committee

ENVIRONMENT & ENERGY EFFICIENCY COMMITTEE MEETING MONDAY, MAY 15, 2023 AT 7:00 PM

AGENDA

Pursuant to Chapter 2 of the Acts of 2023, the meeting and public hearing will be conducted with remote opportunities for participation. Remote participation and access methods include:

ACCESS INFORMATION:

- A. The Public may join the virtual meeting online: <https://watertown-ma.zoom.us/j/89347924373>
- B. You can request placement of an item on future agendas by contacting Jeanne Trubek mjtrubek@gmail.com or Ellen Menounos ellenmenounos@gmail.com

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- 1. 7:00 Welcome and Introductions
 - 2. 7:05 Announcements and Approval of April minutes
 - 3. 7:10 Energy Manager Report
 - 4. 7:25 Environmental Planner Report
 - 5. 7:50 Working group reports
 - A. Transportation
 - B. Net Zero
 - C. Watertown Electricity Choice
 - D. Climate Plan Outreach
 - E. Ordinances
 - 6. 7:30 Discussion
 - A. Moving residents toward electrification: Home Improvement Contractors
 - 7. 8:20 New Business (Submitted after Agenda was posted)
 - 8. 8:30 Adjourn

Watertown is a vibrant community where people from diverse backgrounds and cultures come together and thrive. Our rich history of evolving industry and innovation informs a present commitment to developing equitably and sustainably. As challenges emerge, we face them together. Climate change is the most pressing issue of our time, and we are already beginning to experience some of the impacts today. In Watertown, acting on climate change means preserving our unique neighborhoods and natural resources, while also enabling growth, technological innovation, and community well-being. Resilient Watertown, our Climate & Energy Plan, is a unified vision that outlines goals, strategies, and actions to drastically reduce our contribution to climate change and enhance our resilience to its impacts.

To this end, the City of Watertown is in the midst of a multi-year campaign (2023-2025) designed to leverage its local knowledge, trusted relationships, and experience and that of other local community-based organizations to increase awareness and measurable participation in energy efficiency offerings among all customers, with an emphasis on the following target groups:

- Renters and landlords
- Residents whose primary language is not English
- Moderate income residents (defined as 60–80% of state median income)
- Small businesses

The program's overall goal is to increase the participation levels in energy efficiency programs, specifically:

- residential weatherization (Wx)
- heating and cooling (HVAC)

City of Watertown seeks a Home Performance Contractor (HPC) to provide marketing support, customer intake and triage, and direct service related to the ongoing campaign to promote and coordinate delivery of energy assessments, weatherization and HVAC upgrades in 1-4 family residential buildings. We seek vendors to leverage existing utility and state programs and create processes that remove barriers to serve the following target populations:

- Renters and landlords
- Residents whose primary language is not English
- Moderate income residents (defined as 60–80% of state median income)

There will be no financial relationship between the City of Watertown and the HPC. It is expected that all activity executed by the HPC on behalf of the program will be funded through the HPC's marketing budget with the assumption that City of Watertown and the cities' co-branding will increase the efficiency and effectiveness of the HPC's marketing spend and provide access to new sets of customers.

Scope of Work:

Task 1 - Marketing and Outreach:

Though residents will be allowed to access programs through any allowed pathway or vendor, the City of Watertown will guide households to the selected HPC as the primary entry point for moderate income and market rate energy assessments. The selected HPC will have access to the logos and seals of the City of Watertown for approved uses in order to conduct co-branded marketing efforts. All marketing pieces using the City of Watertown or the cities' names, logos or seals or referencing the affiliation must be approved by the City of Watertown and their designated representatives.

Marketing efforts might include:

- Field marketing through tabling at public events or door-to-door canvassing
- Direct mail via letters or postcards to Watertown's residents
- Digital advertising via search engines, social media, and online advertising
- Reverse 311 messages
- Print advertising
- Radio advertising
- Public displays such as banners or billboards

The City of Watertown will collaborate with the HPC on additional ideas to connect residents with no-cost energy assessments, such as mobilizing volunteer resources to support outreach efforts and introduce the HPC to key institutions in the city, like houses of worship, neighborhood associations, community organizations, and encourage collaboration.

Through the combined impact of these marketing efforts, the campaign should exceed the program's goals of 188 weatherization installations, 142 HVAC upgrades and 70 small business energy assessments annually.

Task 2 - Customer Intake and Service Delivery:

The HPC should maintain a call center capable of handling inbound calls and making outbound calls to interested residents identified by the communities' campaign. The HPC should have a customized protocols for scheduling energy assessments for all interested and qualified residents, including:

- Landlords of 1-4 unit buildings
 - With multiple properties
 - With mixed income tenants
- Renters in 1-4 unit buildings
- Non-English speaking customers in the City of Watertown
 - Spanish
 - Portuguese
- Moderate income residents who are eligible for enhanced weatherization incentives

In addition, HPC must have a streamlined process to refer unqualified residents to appropriate programs / vendors including:

- Income-eligible customers
- Customers that live in buildings or associations with more than 4 units
- Customers that had program visits within 2 years and/or have completed all eligible weatherization measures but are interested in or qualified for HVAC upgrades

The HPC should design processes to deliver equitable service to all qualified customers that may include:

- A process for renters who desire to benefit from the program, but do not want to involve their landlord
- The ability to communicate and deliver service in languages other than English including:
 - Appointment confirmation emails and calls or other Pre-assessment communications
 - Conducting virtual or in-person home energy assessments
 - Post-assessment communications, including contract follow up, weatherization scheduling, HVAC referral
 - Weatherization installation
 - HVAC process (internally or through referrals)
- A process to refer customers to upgrade their HVAC systems that aligns with program prioritization of heat pumps

Task 3 - Data Sharing:

The selected HPC must establish a process to certain data points for all customers served, including data of those customers referred to other vendors, with the City of Watertown or another organization it designates so that actions taken by customers served by the HPC can be attributed to the joint marketing campaign. HPCs should also create a protocol to capture customer permission to share information about their requests for services and the results of those services with City of Watertown. City of Watertown's staff may follow up directly with customers to capture their satisfaction with services and/or identify and remove barriers to accessing service.

Responses requested:

The City of Watertown asks that interested HPCs answer the following questions to address the above scope of work:

Task 1 Marketing and Outreach:

Please describe in detail the co-branded marketing and outreach efforts you'd propose in order to surpass the City of Watertown goal of 188 weatherization installations, 142 HVAC upgrades and 150 small business energy assessments. In your response, please describe

- 1.1 Approximately how many completed home energy assessments (residential and small business) would be necessary to reach the goals
- 1.2 Your company's capacity to schedule and deliver this many energy assessments annually
- 1.3 The channels and methods you propose using as well as their frequency and volume

- 1.4 How you would leverage the brands and communication channels of the City of Watertown in your marketing efforts
- 1.5 How you would make your efforts focused on or at least inclusive of the target populations of the campaign

Task 2 Customer Intake and Service Delivery:

- 2.1 Customer Intake: Please describe your intake process for identifying, serving, or referring the following groups of leads who request your services in the field, online or by calling your call center. Please include details on when in the process you capture customer information and if and how these customers can schedule their own appointments online:
 - 2.1.1 Landlords of 1-4 unit buildings
 - 2.1.1.1 With multiple properties
 - 2.1.1.2 With mixed income tenants
 - 2.1.2 Renters in 1-4 unit buildings
 - 2.1.2.1 Who are willing to coordinate with other tenants and/or their landlord
 - 2.1.2.2 Who do not wish to coordinate with other tenants and/or their landlord
 - 2.1.3 Moderate income households who are eligible for enhanced weatherization incentives
 - 2.1.4 Income-eligible customers
 - 2.1.5 Customers that live in buildings or associations with more than 4 units
 - 2.1.6 Customers that had program visits within 2 years and/or have completed all eligible weatherization measures but are interested in or qualified for HVAC upgrades of heat pump installations
 - 2.1.7 Small Businesses
- 2.2 Customer Service: During home energy assessments, please describe your process for making HVAC referrals
 - 2.2.1 What criteria do you use to determine if a referral is made?
 - 2.2.2 To which company(ies) do you make your referrals?
 - 2.2.3 Are customers able or encouraged to set an appointment for an HVAC consultation during the home energy assessment?
 - 2.2.4 At approximately what percentage of visits is an HVAC referral made?
 - 2.2.5 Are referrals made specifically for heat pumps?
 - 2.2.5.1 If so, approximately what percentage of referrals are made specifically for heat pumps?
 - 2.2.6 What if anything do you do to ensure your HVAC referrals receive a price that is competitive with the market rate for similar equipment?
 - 2.2.7 Approximately what percentage of referrals result in
 - 2.2.7.1 A completed HVAC consultation?
 - 2.2.7.2 A completed HVAC installation?
 - 2.2.7.3 A completed heat pump consultation?
 - 2.2.7.4 A completed heat pump installation?

2.3 Customer Experience

- 2.3.1 Please share processes you have for collecting customer feedback and provide any relevant metrics you have to demonstrate customer satisfaction.
- 2.3.2 Please provide a copy of your most recent utility contractor quality report. Feel free to provide any comments to explain the grades or improvement plans you may have.

2.4 The City of Watertown Language Needs Matrix:

Please fill out the following table indicating the availability or your willingness to create each of the listed items. It is assumed that all items are available or can be created in English.

- These resources are currently available (Available)
- You will initiate creation these resources upon being selected (Create Immediately)
- You will create these resources before the end of the second year of the program on December 31, 2024 (Create Eventually)
- You cannot commit to creating these resources (No Commitment)
- You don't use these resources or don't plan to use them in this program (N/A)

Resource	Spanish	Portuguese
Field staff (canvassing, tabling, presentations)		
Online-scheduling tool		
Phone scheduling staff		
Pre HEA emails (confirmation, Moderate Income)		
Virtual energy specialists		
In-home energy specialists		
Post HEA phone staff		
Post HEA emails (Barrier removal, contract follow up, HVAC referrals, WX scheduling/confirmation)		
Weatherization crew		

Task 3 Data

Sharing:

- 3.1 Please see the data matrix below. Data will need to be shared with the City of Watertown or another organization it designates at least on a monthly basis, but please indicate if you are able to share it more frequently. Indicate below for each data item if you are:
- Willing to share the data
 - The data is not collected
 - The data is collected but you prefer not share it
 - Other

Data	Description	PLEASE INDICATE IF THIS DATA CAN BE SHARED (Will Share, Not Captured, Prefer Not to Share, Other)	PLEASE ADD ANY NOTES (requests for clarification, other questions, explanation for data sharing answer)
Service Address	Please include unit #		
First Name - Contact Requesting Service	e.g. contact info of spouse, relative, landlord of account holder who contacted vendor		
Last Name - Contact Requesting Service	e.g. contact info of spouse, relative, landlord of account holder who contacted vendor		
Phone Number(s) - Contact Requesting Service	Please include all numbers on file (home, work, cell)		
E-Mail - Contact Requesting Service	Please include all emails on file (home, work)		
First Name - Account Holder	If different from contact requesting service		
Last Name - Account Holder	If different from contact requesting service		
Phone Number(s) - Account Holder	Please include all numbers on file (home, work, cell)		
Business Name	Small Business Name		
E-Mail - Account Holder	Please include all emails on file (home, work)		
Preferred Language - Contact Requesting Services			
Preferred Language - Account Holder			
Inquiry Status	Examples: - HEA Scheduled - Not yet scheduled - Need Additional Information / Customer Action - Referred to Multi-Family (5+) - Referred to Low-Income - Referred to Small Business - Inactive - Not Interested - Inactive - HEA within 2 years		

	- Inactive - Out of Service Area		
Date of HEA			
Status of HEA	Please provide a key to translate your statuses to the following statuses - Scheduled in the future - Completed - Canceled		
HEA cancelation reason			
Result of HEA	Please provide a key to translate your statuses to the following four outcomes - No Opportunity - Contract presented, unsigned - Contracts presented, signed - Health and Safety barrier identified		
Health and Safety Barrier Detail	Knob & Tube (Minor) Knob & Tube (Major) Combustion Safety Failure Asbestos Vermiculite Mold/Moisture Dirt Floor Basement Unvented Bath Fan Other		
Is the service address (unit) rented or owned			
Primary heating fuel			
Date of Wx			
Status of Wx	Please provide a key to translate your statuses to the following three statuses - Scheduled in the future - Completed - Canceled		
Wx cancelation reason			
List of instant savings measures			
Value of instant savings measures			

Projected savings from ISMs			
Value of insulation and air sealing			
Projected savings from insulation and air sealing			

- 3.2 Please describe how you will obtain customer permission to share their data with the City of Watertown. In addition, please clarify, will this be an opt-in or opt-out process?

Task 4 Open Response

- 4.1 Please include any other information you wish about your company's qualifications to be selected as the vendor for this program
- 4.2 What additional resources or support could the City of Watertown provide to you that would make it easier for you to achieve as many of the goals and objectives of the scope of work as possible?
Examples include:
- 4.2.1 Help with recruiting bilingual talent
 - 4.2.2 Assistance with translation of materials or real time interpretation