

Attachment 4

Education and Outreach Plan

State of Wisconsin Home Energy Rebates Home Efficiency Rebate (HOMES) Program

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Introduction

The foundation for a positive consumer experience lies in effective outreach and education regarding the benefits of the IRA Home Energy Rebate programs. Focus on Energy (Focus) was chosen to administer the Wisconsin program because of the structure already in place to reach most of Wisconsin’s residential customers. Focus on Energy has a successful communication platform already in place, i.e. website, newsletters, support channels, etc. Focus is also able to start with an engaged group of contractors, partners, and potential participants and will be able to share information on rebates that can be stacked on top of the Home Energy Rebates for participants. This may include additional rebates or services through the Department of Administration’s Division of Energy, Housing and Community Resources (DEHCR) Home Energy Plus program, Focus on Energy, tax credits and other utility incentive programs.

Focus on Energy will utilize outreach efforts to cross promote both the Home Efficiency Rebates (HOMES) and Home Electrification and Appliance Rebates (HEAR) programs as much as possible and where appropriate, depending on the communication tactic and message.

Contractor Outreach

Contractor participation and understanding of the Home Efficiency Rebates program is critical for success. During the first 12-18 months after program launch there will be a heavy focus on contractor education and outreach. The State of Wisconsin (The State) does not believe recruitment efforts will need to be a large focus of initial outreach efforts. It will be important to be clear on what contractor expectations are if they are to deliver programs to participants. Naturally, outreach will begin with the

existing Focus on Energy Trade Ally network. Any Registered Contractor for the IRA program will need to sign up to participate in the Home Efficiency Rebates program, regardless if they are already a Focus on Energy Trade Ally. Contractors will have to agree to meet all Focus on Energy Trade Ally qualifications, agree to the IRA Code of Conduct, and provide any additional documentation the program requires for participation. Approval is estimated to take approximately two business days. Once participation is confirmed, the bulk of communication and interactions with contractors will be related to how to work through the steps of the program, making these steps easy for them to understand, and how to talk about the program to participants. Contractors can always reach program staff through a dedicated IRA email address, Focus on Energy phone number, or they can sign up through the Focus online application (currently part of our Trade Ally website).

The following is a list of anticipated tactics that will be part of program outreach deliverables.

- Email – one way to reach contractors with program information is via email. Email will be a primary way to target participating contractors and share program updates, tips, information, success stories, etc. with them.
- Direct outreach – while it is nice to have documentation of information, the best interaction is an actual conversation. Focus on Energy has the benefit of an implementer dedicated to program Trade Allies. Focus implementers have Energy Advisors who are the primary point of contact for contractors. The program intends to use them to engage and have regular contact with contractors. This outreach may be either through in-person visits, phone calls, and email.
- Website Resources – Currently, Focus on Energy has a Trade Ally section on their website. This will be utilized as a central location of resources for IRA Registered Contractors as well. Not only will program details be available, but also helpful speaking points or suggestions on explaining program or technology details to participants. Registered Contractors can also use the Focus on Energy logo to promote the program and co-branding ads may be available for use.
 - All IRA Registered Contractors will be listed on the program website so potential participants are able to see who they can work with to deliver program benefits.
- Video – there are many opportunities to use short videos to provide directions to contractors that will make their program participation easier. Focus on Energy calls these “explainer” videos, and many find them helpful in ways we use them today. From walking contractors through income eligibility, forms/documentation, or a new payment submission/look up tool, a short video may be more helpful or used to compliment written directions. These videos can be found on the dedicated Trade Ally webpages noted earlier and featured in regular email communications.
- Collateral – While a vast amount of printed collateral is not believed to be needed, sometimes a piece of paper to walk a program participant through the program steps, qualification, and benefits is needed. This would be a flyer or program fact sheet explaining the program and their participation. It might also be something distributors use to go over the program with their contractors.
- Social media – In the event that additional IRA Registered Contractors will need to be recruited, The State of Wisconsin can utilize existing email lists and cross reference them with LinkedIn or Facebook outlets and run targeted ads.
- Annual events – Each year, Focus on Energy or participating utilities host in-person, Trade Ally meetings where new program information is shared, feedback is gathered, and networking can

occur. Updated IRA program info can also be shared at these meetings to either highlight benefits of participation, communicate any changes, or additional offerings available.

- Partnerships

- Distributors - Focus on Energy currently has relationships with many distributors in the state through its existing Midstream and Instant Discount Programs. To start, targeted outreach to selected existing Focus on Energy distributors related to delivery of the Home Efficiency Rebates program will be used. These distributors are listed below. Using distributors for their close interaction with contractors may help reach organizations that had not been previously. Interaction may include presenting IRA program information at meetings, through newsletter communications, other touch points already in place. New distributors will be targeted for inclusion in these programs as well, as identified during program planning. Some of those we initially intend to work with, and already having relationships with through Focus on Energy programs, are listed below.
 - Design Air
 - Gustave A. Larson
 - Auer Steel
 - Ferguson East
 - Ferguson West
 - First Supply
 - Temperature Systems, Inc.
 - Mid-State Supply
 - Stevens Equipment Supply
- Weatherization agencies – Weatherization agencies will be an important partner, as their program and IRA Home Energy Rebate programs both target an income-based audience. In many cases, to have the customer maximize benefits, there will need to be coordination between federal programs benefits. If a Weatherization Contractor is already in a home, they can also install complementary IRA measures. These agencies may also be a resource if they are unable to retrofit all homes in need in particular high-energy burden communities or if homes do not qualify for Weatherization programs, but still need help, can be referred to IRA programs. For this to occur, additional training will also need to be provided.
- Licensed Entities – Current home programs in Wisconsin already partner with several types of contractors. One of the benefits of IRA Home Efficiency Rebates are additional home improvement measures that we may not have been able to improve before through existing Focus on Energy programs. An example is electrical panel upgrades. The State will be reaching out to the Wisconsin Chapter of the National Electrical Contractors Association (NECA) for partnerships. Other associations to engage might include Plumbing, Heating, Cooling Contractors of Wisconsin, IBEW Locals, LiUNA Wisconsin Laborer’s District Council, or BlueGreen Alliance. The State will also be working with Wisconsin’s Department of Safety and Professional Services to get participating members of a variety of licensed trade entities. These are also organizations that can be engaged with through sponsorship/advertising opportunities if needed.

Once the early program stage passes, focus may need to change to recruiting IRA Home Efficiency Rebate Registered Contractors, especially in certain areas of the state. Email blasts, social media ads, professional organization marketing, manufacturer presentations, and direct outreach are all examples of more formal marketing efforts that may be needed.

Since these tactics focus more on businesses, they may also be relevant avenues to reach multifamily owners. General outreach for multifamily opportunities will be limited. However, many of the education tactics listed above can still be relevant. We believe building owners/managers would benefit most from direct or targeted outreach. In partnership with WHEDA, we will be able to secure a list of targeted multifamily contacts. This list can also include those properties that qualify for Section 8 housing, which will greatly benefit income qualified tenants. Statewide and regional multifamily associations may also be partners to reaching this audience through utilizing their meetings and newsletters.

Current Focus on Energy partners and Trade Allies will be communicated with first through existing outreach channels. They are always able to reach the program through our dedicated IRA email and Focus on Energy phone numbers.

Household Outreach

While contractor participation is essential, no projects would be complete without a program participant. For the launch period and 12-18 months after, the priority will be on making sure to educate the participant on the program process and ensuring they have a positive customer journey. To make sure of this, the intent is to have plenty of contractors in place and ready to go so customers do not experience long wait periods or Trade Ally confusion. If participant recruitment is necessary, it may be targeted in certain areas of the state with higher contractor capacity, those with higher energy burden, disadvantages communities, or those households with the potential to deliver the greatest program savings. While the program is statewide, broad mass media efforts are thought to be a misdirected use of available funding. Efforts will be placed more on consumer education of program benefits, matching participants to program partners or resources, how to efficiently navigate the program's customer journey, and how to successfully use/maintain their purchased home upgrades. While most of the education and outreach efforts below can be used for all eligible participants, there will be opportunities to target certain demographics. Priority of targeted households will be to single family homeowners in disadvantaged communities, identified through counties, zip codes, or public assistance participant lists, in areas of the state where we know contractor capacity or product availability is known.

The following is a list of anticipated tactics that will be part of our program outreach and education deliverables.

- Email – Email will be used to share updates with residents about launch, program onboarding, tips, etc. Not only were emails collected from those that registered to get more information, Focus on Energy, Wisconsin utilities, etc. there are several partner organizations with regular newsletters that would allow HOMES to have an article.
- Partnerships – Direct outreach is typically not feasible to reach a broad participant audience. We have several cities/municipalities, advocacy groups, and Community-Based organizations are clamoring for information. Not only has Focus on Energy and The State of Wisconsin been invited to speak already before programs launch, also it is expected these invites will continue, allowing the program to engage smaller groups to share program information and benefits.

Many of these groups feel HOMES is an important program for their area and will also be doing outreach on The State's behalf. Use of existing newsletters, email lists, public information sessions/events, and helping participants find trusted contractors in their area, and other outreach or education tactics that these groups find their community benefits from. Having like-minded people that are trusted share program information is invaluable.

- Full detail on these Community Based Partnerships can be found in the Community Benefits Plan. However, the program hopes to initially partner with at least 10 community-based nonprofits located in Justice40 communities across the state to spread awareness of the program and refer eligible households to participate.
- Program outreach to these groups will vary, but the majority will most likely be one-on-one meetings.
- An example list of some, but not all community stakeholders that Wisconsin will engage are listed below.
 - Wisconsin Local Government Climate Coalition
 - Focus on Energy Partnered Community-Based Organizations
 - Vernon County Energy District
 - DNR Green Tier Legacy Communities
 - Reclaiming Our Neighborhoods (RON) Coalition (Milwaukee)
 - Sheboygan Housing Coalition
 - UMOS (Milwaukee), Centro Hispano (Milwaukee & Dane Counties), Wi EcoLatinos (Dane, Rock, & Columbia Counties), Dane County Latino Academy of Workforce Development
 - Hmong American Partnership (Appleton) and Hmong American Center (Wausau)
 - 16th Street Community Health Center (Milwaukee)
 - Habitat for Humanity (chapters across the state) & Revitalize Milwaukee
 - Walnut Way / Lindsay Heights Neighborhood Improvement District, Sherman Park ECO Neighborhood, Northwest Side Community Development Corporation, and Citizens Action WI
 - Blacks for Political and Social Action
- Website – Currently, The State of Wisconsin is driving everyone to the Focus on Energy IRA Home Energy Rebates Program webpages to get the most up to date information. Centralization of resources is important for ease of updating and it allows people to know they can always go to the site for reliable and current information. As noted in the partnership tactic, not only are many third-party organizations working on The State's behalf, having a place where they can get information, so our message is consistent is very important. Process, technology specific pages, income qualification calculator, rebate stacking of Focus on Energy/IRA, Registered Contractors, blogs, and videos are all things that may be available on the website for participant education. The program phone number and dedicated email address will also be listed on the website for any additional needs or questions.
- Video – there are several opportunities to use short videos to briefly explain a complicated program. Simple pieces of information can be broken down and explained to people that might help them walk through income eligibility, technologies they have not heard of, or even how you model a home. To some, a short video may be more helpful or used to compliment written

directions. Videos may be found on program websites, but also highlighted in program emails or social media calling people to the available resource.

- Collateral – While a vast amount of printed collateral is not believed to be needed, there may be some materials used to give more detail on qualifying HOMES energy saving measures and process. Collateral may include program process fact sheets, flyers/cards directing participants to the website for current information, resources, or information on common equipment upgrades. In some instances, there may be opportunities for co-branding opportunities with local municipalities, utilities, or community partners.
- Social media – Being able to share program information/updates on a social platform will be helpful to drive people to videos or other web resources. Based on participant income qualification, targeted ads will be run by zip codes relating to those likely to qualify for program standards. Social platforms that may be utilized are Facebook and Instagram.
- PR/Media – traditional media has been interested and responsive to content related to IRA programs. Based on relationships, The State is hopeful to get re-occurring spots on newscasts, radio sponsorships on Wisconsin Public Radio and Spanish-speaking radio stations in the state. It is unlikely budget will be set aside for traditional paid media advertising and focus would be on earned media or specific sponsorship opportunities that can demonstrate reach to targeted audiences.

Many of the education and outreach tactics listed above will be relevant in multifamily situations as tenants or recipients of owner program participation will need to know how to encourage their owner/manager to participate, explain benefits of upgrades, and how to operate their upgraded equipment or efficiency upgrades.

Current Focus on Energy outreach channels will be a significant help to engaging with a group that is already interested or aware in energy efficiency. Communication through the various channels listed above will also allow sharing information on opportunities to utilize incentive opportunities available through non-federal funds and grants, such as Focus on Energy.

Timeline

The tactics listed above for both contractor and household outreach will be relevant during launch/early program (12-18 months) and the remaining years of the program. This should be approximately summer 2024-2025. Messaging or concentration of efforts might change and initially IRA Registered Contractor focus will be heavier than households to make sure the market is ready, and participants have a smooth customer journey through the program. A proposed timeline of education and outreach is below.

Table 1: Proposed Timeline

	2024		2025				2026			
	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Contractor Tactics										
Email										
Direct Outreach										
Website Resources										
Video										
Collateral										
Social Media										
Annual Events										
Partnership Outreach										
Household Tactics										
Email										
Partnership Outreach										
Website Resources										
Video										
Collateral										
Social Media										
Media										

Estimated Budget

<u>Cost Type</u>	<u>Purpose and Basis of Cost</u>	<u>Budget</u>
<u>Administrative</u>	<u>Marketing, education, and outreach</u>	<u>\$845,000</u>