COVID-19

CAN UTILITY PROGRAMS GO THE (SOCIAL) DISTANCE?

APRIL 8, 2020
Welcome to the webinar

Panelists and Agenda

- Panelists
  - Jonathan Kleinman, AIQUEOUS
  - Kristol Simms, Ameren Illinois
  - Karen Guz, San Antonio Water System

- Agenda
  - Webinar overview
  - Attendee polls
  - Panelist presentations
  - Moderated discussion

Zoom Webinar

- Security details
- Raise your hand
- Open meeting chat
- Question & Answer
- Participate when unmuted by moderator
Why are we hosting this webinar?

- **Physical distancing** inhibits key elements of utility programs
- **Recession** is limiting available operating budgets and capital
- Both hit the **economically disadvantaged** the hardest
- Physical distancing also creates **challenges for your teams**
- And you still (for now) need to **hit your goals**
Differences in State timing are narrowing

When each state will reach peak daily deaths
States projected to hit their peak daily deaths related to COVID-19-related at a later point also tend to have the lowest daily death peaks.

- Over hospital bed capacity
- Under or at hospital bed capacity

Chart: Elijah Wolfson for TIME • Source: Institute for Health Metrics and Evaluation • Get the data • Created with Datawrapper
Are we getting there?

Now is not the time to let up
ATTENDEE POLLS
JONATHAN KLEINMAN, AIQUEOUS
CAN UTILITY PROGRAMS GO VIRTUAL?
Topics covered

- Survey results – how are AIQUEOUS clients responding?
- Aggregate impact data – January through March
- What makes utility programs vulnerable to “physical distancing”?
- Proposed strategy to manage risk and shift more program elements to virtual delivery
POWERPATH / WaterWays data

Online rebate

Online rebate

Online rebate

Online rebate
POWERPATH / WaterWays data, closeup

- Online rebate
- In-Field Programs
- EVs (2)
AIQUEOUS survey results

- **Have program operations ceased?**
  - In field program operations – whether for assessments, audits or inspections – *have ceased* in all stay-at-home-ordered jurisdictions.
  - Ongoing construction activity depends upon the jurisdiction.
  - Online applications, rebate processing and education has continued.

- **Have customer participation patterns changed significantly?**
  - Applications decreased in March as compared to February across the board.
  - Customer purchasing patterns – based upon rebate programs – have not switched to online purchases as opposed to “brick-and-mortar” stores.
  - Customer inquiries are heavily focused on efficiency, rebates and do-it-yourself projects with stead interest in PVs and EVs.
Have any programs been halted for the year?
- No – the sense across the board is that these are temporary suspensions
- Programs on a fiscal year through June 30th have closed until July 1st

Are there other noticeable shifts or issues?
- Some clients are directing effort and resources toward income-qualified customers and those hardest hit by the recession
- Some legacy databases are "on-premise" and program staff are having trouble accessing and working in them
Why are utility programs vulnerable to physical distancing?

**Barriers solved by programs**
- Information costs and asymmetry
- Performance uncertainty
- Transaction and hidden costs
- Financing
- Organizational practices
- Product unavailability

**Common program strategies**
- Technical assistance
- Case studies and referrals
- Technical assistance
- Incentives and financing alternatives
- Site visits and presentations
- Recruitment of midstream and upstream providers

Utility programs largely operate in an analog mode: Our industry has addressed many of these barriers through physical interactions
Why are utility programs vulnerable to physical distancing?

Common program requirements and strategies

- Pre-project site inspection
- Post-project site inspection
- Point of purchase display
- Audits and assessments
- Conferences and meetings
How can utilities reduce risk from future events?

I. Prioritize programs for virtual delivery
II. Make priority programs “digitally ready”
III. Understand the objective of each program step
IV. Develop and deploy virtual strategies where possible
I. Prioritizing programs for virtual delivery

- Sample criteria
  - Contribution to portfolio performance
  - Equity
  - Economic development / support
  - Resilience
  - Customer experience
II. Digital readiness: virtual programs need higher resolution

Many utility program designs live in people’s heads
III. Program steps: to direct, motivate, or shape

1. Direct the Rider (the rational mind)
2. Motivate the Elephant (the emotional mind)
3. Shape the Path (the situation or environment)
IV. Deploy virtual strategies

- Direct
  - Usage analysis and alerts
  - Labeling or ranking
  - Online audit results

- Motivate
  - Competitiveness (comparisons)
  - Achievement (badges)
  - Trust (endorsements)
  - Community (social media)
  - Connection (online chat or video calls)

- Shape the Path
  - Application process
  - Online marketplaces
  - Online inspections or “self-serve” verification
  - Customer experience integration
What questions are of greatest interest to you on this webinar?

Answered: 19  Skipped: 0

- What are other utilities doing in regards to their programs that require customer contact (i.e., are program requirements being changed as a result of the “safe at home” orders being issued)? 57.89% 11
- How are you looking ahead to achieving your goals for 2020? 18.79% 3
- What can we do to assist the customers during this time in terms of keeping the customers engaged? 10.33% 2
- How are you giving thanks and building team morale during these challenging and uncertain times? 0.00% 0
- Other (please specify) Responses 18.79% 3
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<thead>
<tr>
<th>Answer Choices</th>
<th>Responses</th>
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<tbody>
<tr>
<td>Why am I still answering this survey? Start the webinar already.</td>
<td>11.11%</td>
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<tr>
<td>I need details. Lots and lots of details.</td>
<td>27.27%</td>
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<td>Can we take the emotional temperature in the room first?</td>
<td>5.56%</td>
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<td>Just give me the big picture, I got it from there.</td>
<td>55.56%</td>
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<td>Total</td>
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What is the type of organization at which you work?

Answered: 19    Skipped: 0

- Energy utility or retailer
- Water utility
- Utility service...
- Non profit organization
- Other (please specify)