



DTE Equity & Inclusion Study
Phase Two Kickoff Meeting
3/10/2022

1. Introductions & Kickoff Framing (20 Minutes)
2. Mini-Survey Plan and Methodology Review (10 Minutes)
3. Mini-Survey Themes Review and Discussion (1 hour)
4. Update on Geographic Targeting (20 Mins)
5. Wrap Up (15 Minutes)

→ **Agenda**

Team Member	Role
Karen Ehrhardt-Martinez, PhD	Director Behavioral Science and Customer Insights
Tim Hillman, PhD	Director Analytics and Customer Insights
Thomas Glendening	Senior Director Residential Programs
Chris Munn	Director Residential Programs
Noah Purcell	Project Management
Heather Driscoll	Senior Managing Director – Survey Research
Rachel Kinder	Supervisor – Survey Research
Lea Lupkin	Senior Manager – Customer Insights
Chris Ross	DTE EEA Program Manager
Annalisa Wilder	DTE Pilots Senior Energy Analyst
Dany Kahumoku	Senior Diversity, Equity, and Inclusion Specialist
Courtney Barthle	Diversity, Equity, and Inclusion SME
Kristin Catanese	ICF Marketing Lead
Steve Younessi	Metric Development Support
Nolan Hollis	Metric Development Support
Kendall Effinger	Analytics Design Support
Johanna Ortiz	Analytics Design Support



- ❖ Jason Kupser
- ❖ Kevin Bilyeu
- ❖ Josh Martens
- ❖ Jeff LeBrun
- ❖ Jose Goncalves
- ❖ David Becker

DTE

→ **DTE Team**

- ❖ Chinyere Osuala – Earthjustice
- ❖ Sharonda Williams-Tack – Sierra Club
- ❖ Elena Saxonhouse – Sierra Club
- ❖ Alexis Blizman – Ecology Center



→ Stakeholders



Phase Two: Mini-Survey Content Review

- Recap and Discuss each of the Mini-Survey themes
- Rank the importance of the Research Topics

→ **Mini-Survey Plan and Methodology Review**

DTE Equity and Inclusion Study Phase Two Mini-Surveys

- Six Mini-Surveys designed as a series
 - 10 questions maximum per survey
 - As much as \$10 incentive per survey
- Survey Goals
 - Focus on building rapport and understanding of respondents to increase empathy and strengthen insights about customer perspectives, values, challenges, sense of community, resources, etc.
 - Enhance cultural sensitivity of program design, outreach, and implementation strategies



→ **Mini-Survey Series Plan and Methodology Review**



1. Awareness, Experiences, and Perceptions of DTE and IQ Programs



2. Home Related Challenges and Joys



3. HVAC Concerns, Maintenance, and Temp Settings



4. Resilience, Self-Reliance, and Community Connections



5. Security of Food, Health, Housing, and Energy



6. Household Composition, Demographics, and Home Use

*Each survey respondent will also complete a short entry-point survey

→ **Mini-Survey Themes Review**



Questions or Concerns



Missing Items

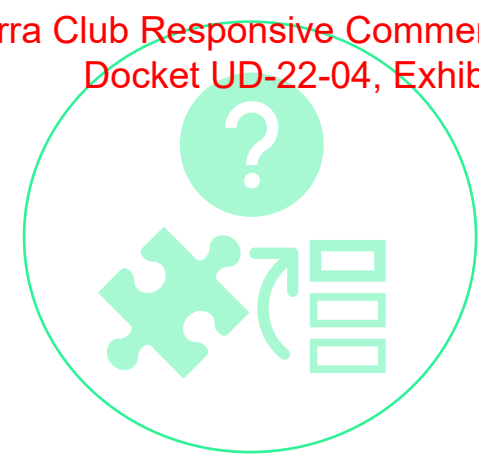


Ranking of Research Topics

→ **Mini-Survey Themes Review**

Purpose: To learn more about customers' perceptions and experiences with DTE and customers' recommendations for change.

Goal: Improve on customers' perceptions and experiences and potentially adjust programs to better meet customer concerns/needs.



Research Topics:

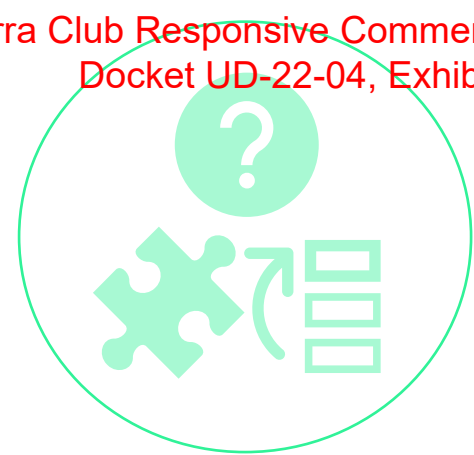
1. Perception/Sentiments of DTE
2. Visibility of DTE
3. Experience with DTE
4. Awareness of DTE Programs
5. Utilization of income qualified focused programs (including Non-DTE Programs)
6. Recommendations to enhance DTE service/programs
7. Comfort participating in DTE programs
8. Trust in DTE and DTE program partners
9. Perceptions of equity in DTE program provision



→ **Awareness, Experiences, and Perceptions of DTE and IQ Programs**

Purpose: To learn more about how people feel about their home, their home-related desires, and where energy fits into the equation.

Goal: Identify, recognize, and incorporate the things that are important to customers in program communications. Enhance DTE's sensitivity to customers' concerns.



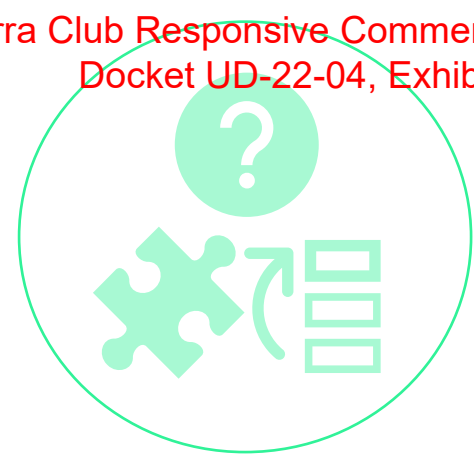
Research Topics:

1. Air Sealing and Insulation levels
2. Positive feelings about different aspects of home
3. Home improvement goals
4. Home repair and upkeep experiences
5. Interactions and familiarity with contractors
6. Comfort with DTE employees entering home
7. Motivation for choosing and/or staying in home
8. Impact of energy costs
9. Renter focused questions
 - Responsiveness of property owner for maintenance
 - Views of property owner
10. Owner focused questions
 - Prioritization of home repairs
 - Level of confidence dealing with home repairs (e.g., obtaining estimates for work on home, DIY capability)

→ Home Related Challenges and Joys

Purpose: learn more about heating related problems, thermostats, maintenance issues and household strategies.

Goal: Enhanced empathy for the heating challenges and gain knowledge as to their prevalence. Improve DTE's ability to anticipate and address these challenges more effectively through education and program materials.



Research Topics:

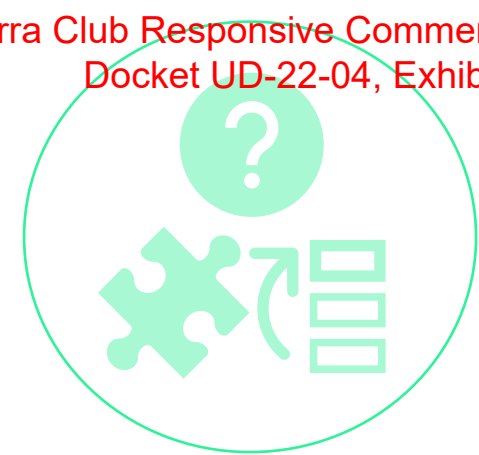
1. Thermal comfort/discomfort in home (e.g., too hot/cold, drafts)
2. Response to discomfort in home
3. Programmable thermostat usage and settings
4. Space heater usage
5. HVAC systems tune up cadence
6. Household experience with and response to HVAC system issues/emergencies
7. Frequency of HVAC issues



→ **HVAC Concerns, Maintenance, and Temp Settings**

Purpose: To learn more about customers' perceptions of their neighborhood/community, availability of trusted community resources, customers' use of those resources, and energy reliability issues.

Goal: Identify issues and opportunities associated with community networks and resilience to inform implementation strategy.



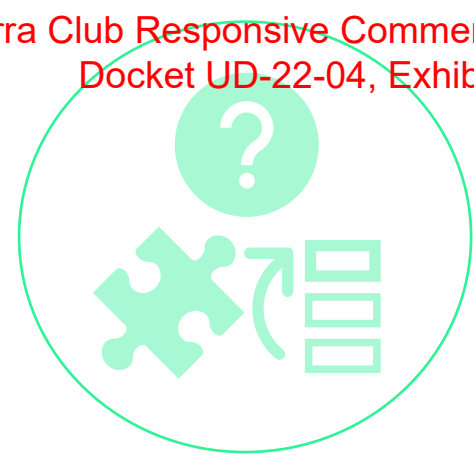
Research Topics:

1. Trust and action with neighbors
2. View of local community
3. Community safety
4. View of DTE in local community
5. Perceptions of and relationships with local community organizations and programs
6. Neighborhood Priorities
7. Impact of extreme weather events on community

→ **Resilience, Self-Reliance, and Community Connections**

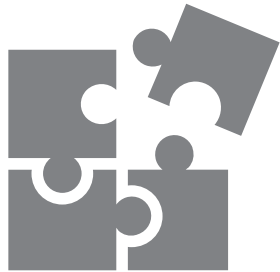
Purpose: Assess the household's status of having basic needs met (monthly budget, energy security, health and safety)

Goal: Enhanced empathy for the prevalence of health/safety/financial challenges and their impact on people's lives. Incorporate these concerns into program materials and outreach strategies.



Research Topics:

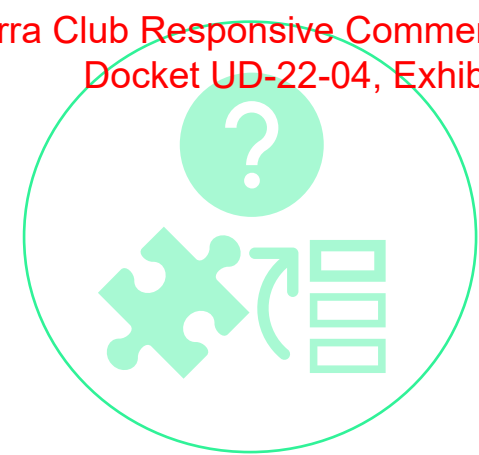
1. Perception of health and safety of home
2. Identification of common health hazards (e.g., water damage, mold, flaking paint, etc.)
3. Bill payment concerns and experiences
4. Prominent financial concerns
5. Impact of financial strain
6. Response to emergency home repair



→ **Security of Food, Health, Housing, and Energy**

Purpose: learn more about household composition, language, and cultural challenges.

Goal: Enhanced empathy for cultural/language challenges and Improve DTE's ability to anticipate and address these challenges more effectively.



Research Topics:

1. Family roles related to energy consumption/billing
2. Household demographics (racial/ethnic background, generations in home, language, etc.)
3. Barriers with DTE bills
4. Communication preferences
5. Social media preferences



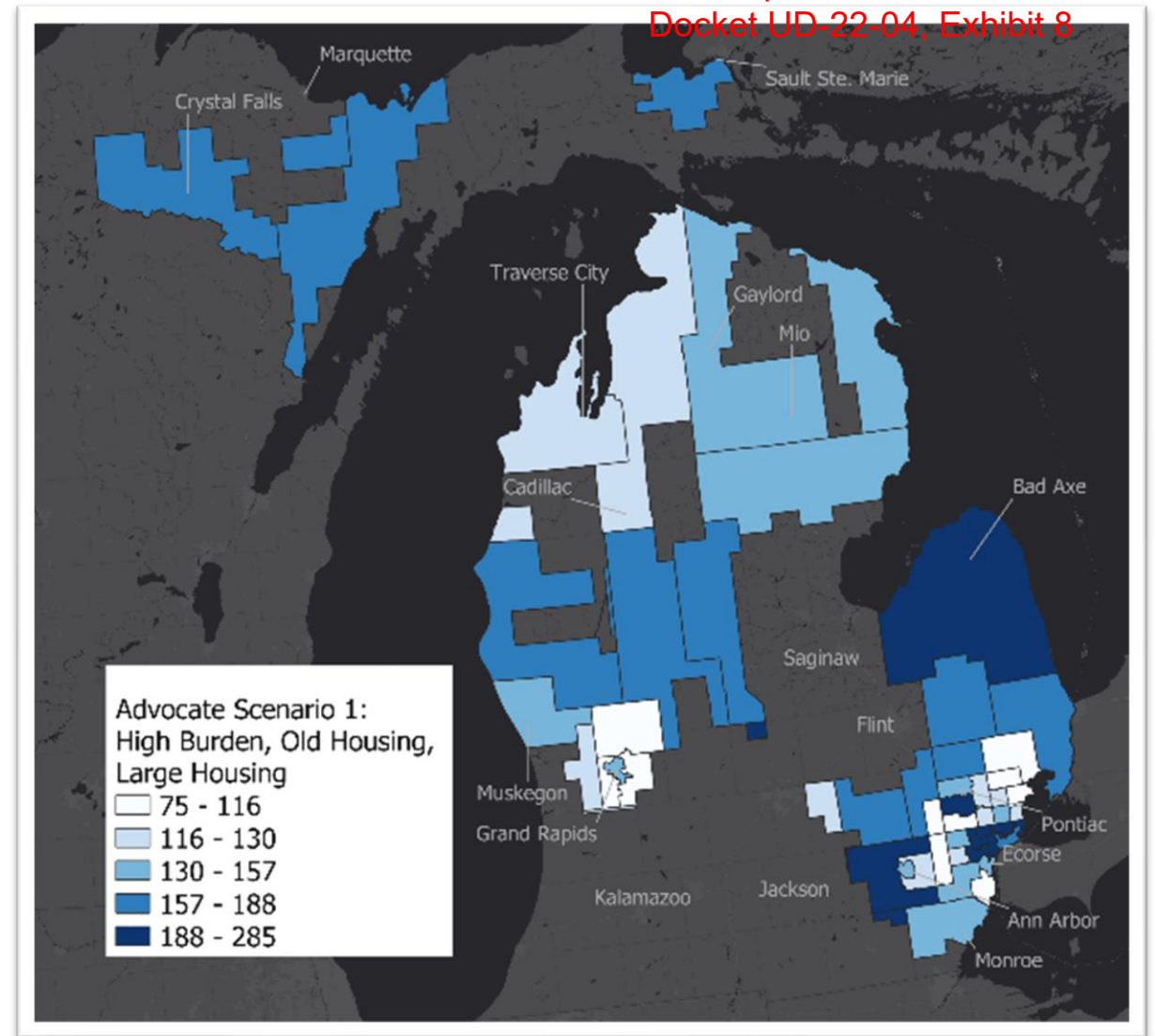
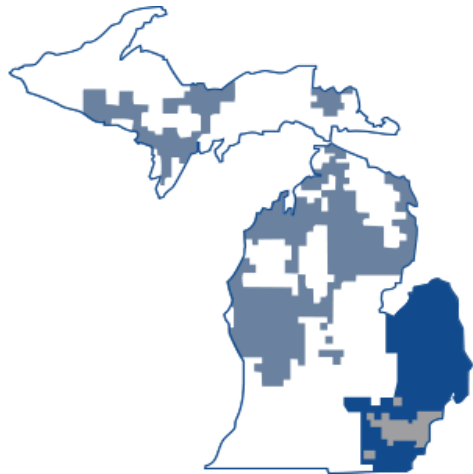
→ **Household Composition, Demographics, and Home Use**



Update on Geographic Targeting

ICF's Geographic Targeting Analysis

- Took up work from Cadmus and Intervenor Group
- Evaluated PUMA selections using household level data



→ Phase Two Study Geographic Focus

PUMA Prioritization Process

- Identified all PUMAs in fifth quintile of Advocate Scenario One need score for single family, income qualified households
- Within these PUMAs evaluated:
 - # of single family, income qualified households
 - Concentration of electric heating
 - % Non-White Population
 - Combo fuel households

Geographic Targeting Process:

- Screened for single family, income qualified homes
- Prioritized PUMAs by the Advocate Scenario One median need score for gas and electric

PUMA	Location	Highest Gas	Highest Elec	Non White	Gas Cust.	Elec Cust.	Gas Need Score Scenario One	Elec Need Score Scenario One
3212	Detroit City SW	1	1	66%	17,374	17,374	362	315
3210	Detroit City NE	2	5	91%	19,700	19,700	357	259
3213	Wayne Co NE - I94	3	2	69%	11,317	11,318	343	294
3209	Detroit City NC	4	4	98%	20,321	20,321	322	260
3208	Detroit City NW	5	3	88%	27,999	27,999	278	291
3211	Detroit City SC and SE	26	6	86%	13,751	13,750	192	257

→ Phase Two Study Geographic Focus

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PUMA	Location	Cadmus Highest Gas	Cadmus Highest Elec	Gas (SF, IQ, Top Quintile %)			Non White	Gas Cust.	Elec Cust.
				Intensity	Burden	Composite Score			
3212	Detroit City SW	1	1	23%	35%	36%	66%	17,374	17,374
3210	Detroit City NE	2	5	39%	39%	49%	91%	19,700	19,700
3213	Wayne Co NE - I94	3	2	13%	19%	20%	69%	11,317	11,318
3209	Detroit City NC	4	4	26%	34%	38%	98%	20,321	20,321
3208	Detroit City NW	5	3	36%	35%	44%	88%	27,999	27,999
3211	Detroit City SC and SE	26	6	15%	22%	22%	86%	13,751	13,750

Cadmus Data

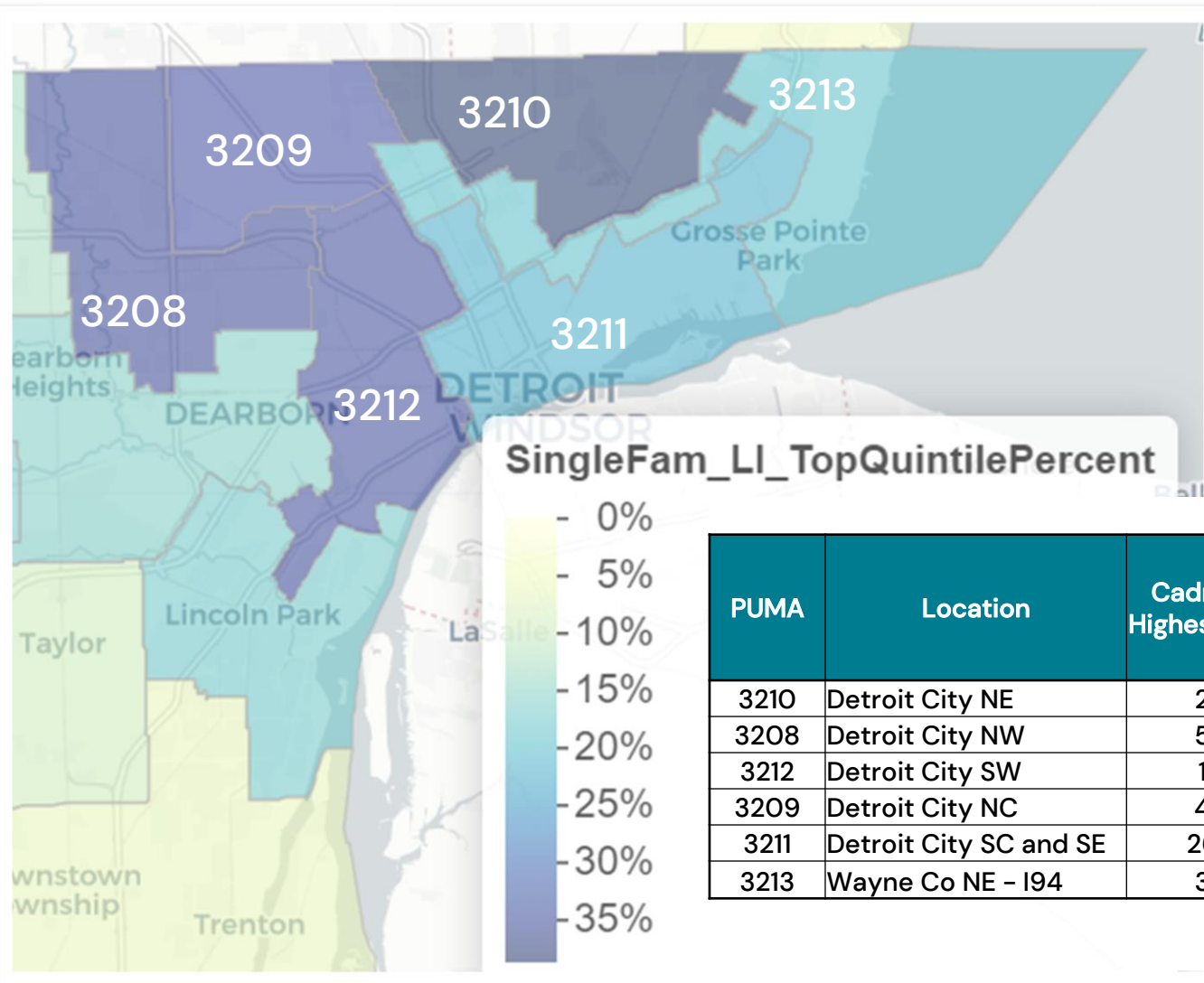
ICF Analysis

Next Level of Analysis:

- Examined PUMAs according to Energy Intensity, Energy Burden, and Composite Score

➔ Phase Two Study Geographic Focus

Top Quintile Single Family, Income Qualified Gas Energy Burden



Ranking by Energy Burden:

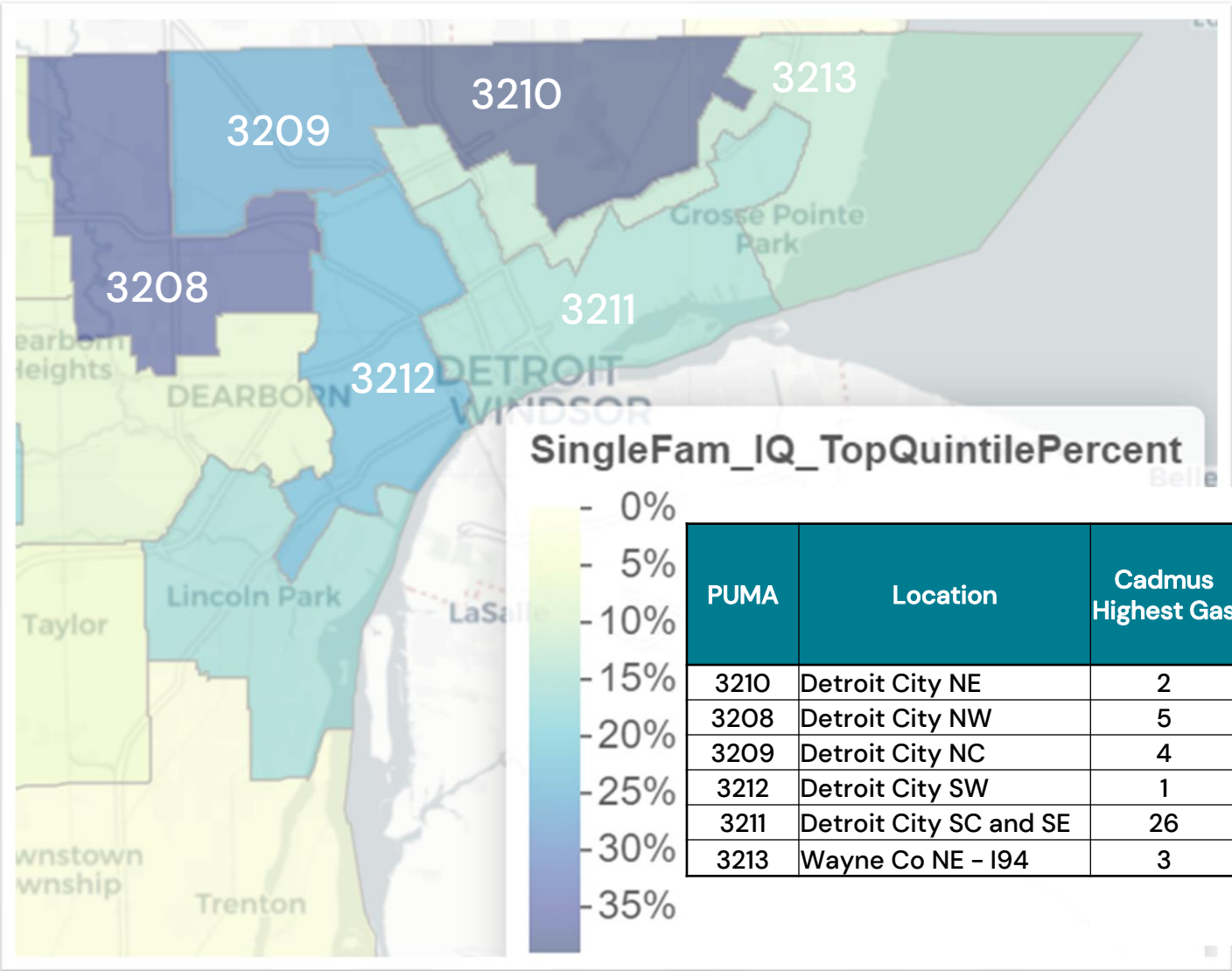
- PUMA 3210 rises to highest priority
- PUMA 3208 next highest priority
- PUMA 3212 rises to third
- PUMA 3209 stays in fourth

PUMA	Location	Cadmus Highest Gas	Cadmus Highest Elec	Gas (SF, IQ, Top Quintile %)			Non White	Gas Cust.	Elec Cust.
				Intensity	Burden	Composite Score			
3210	Detroit City NE	2	5	39%	39%	49%	91%	19,700	19,700
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3212	Detroit City SW	1	1	23%	35%	36%	66%	17,374	17,374
3209	Detroit City NC	4	4	26%	34%	38%	98%	20,321	20,321
3211	Detroit City SC and SE	26	6	15%	22%	22%	86%	13,751	13,750
3213	Wayne Co NE - I94	3	2	13%	19%	20%	69%	11,317	11,318

Cadmus Data
ICF Analysis

➔ Phase Two Study Geographic Focus

Top Quintile Single Family, Income Qualified Gas Intensity



Ranking by Intensity:

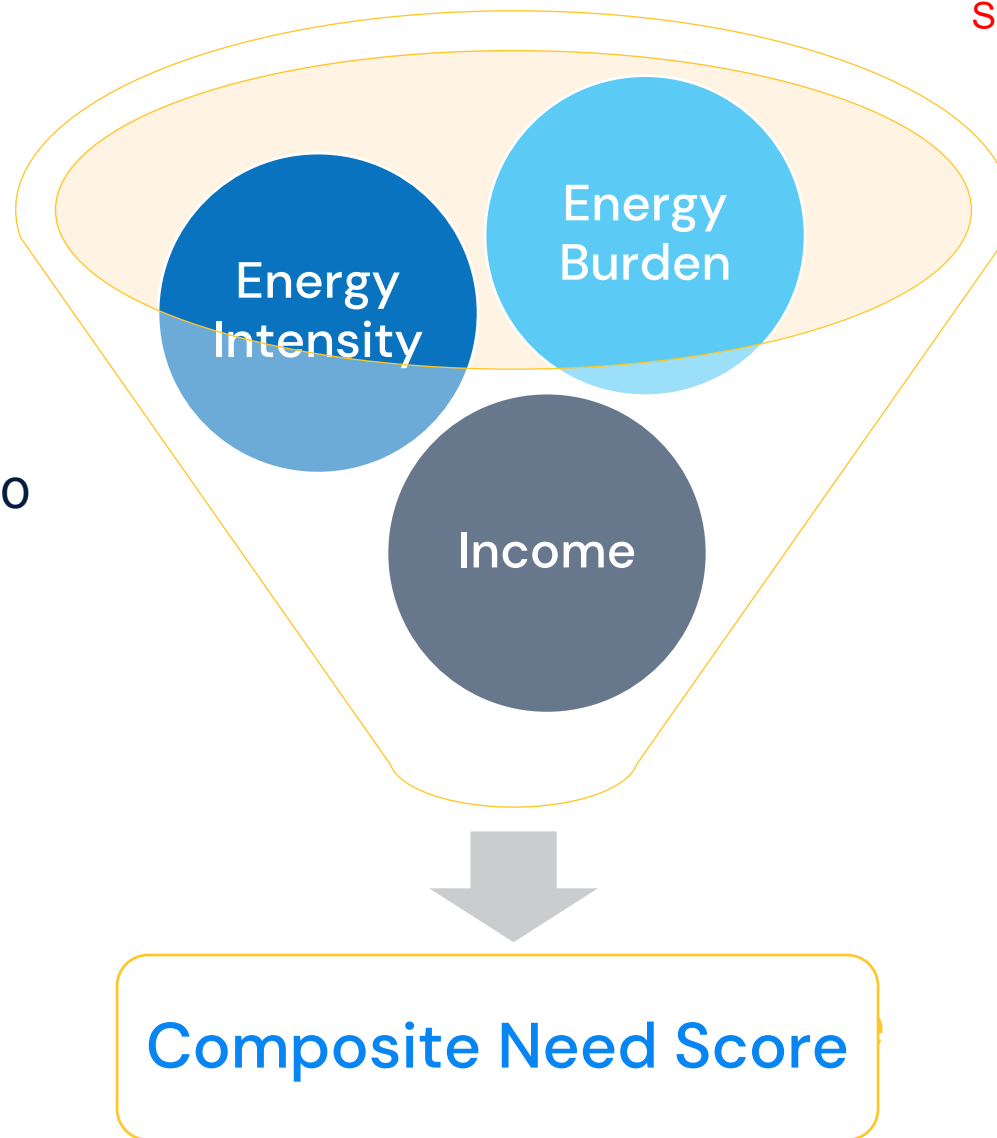
- PUMA 3210 rises to highest priority
- PUMA 3208 next highest priority
- PUMA 3209 rises to third
- PUMA 3212 falls to fourth

PUMA	Location	Cadmus Highest Gas	Cadmus Highest Elec	Gas (SF, IQ, Top Quintile %)			Non White	Gas Cust.	Elec Cust.
				Intensity	Burden	Composite Score			
3210	Detroit City NE	2	5	39%	39%	49%	91%	19,700	19,700
3208	Detroit City NW	5	3	36%	35%	44%	88%	27,999	27,999
3209	Detroit City NC	4	4	26%	34%	38%	98%	20,321	20,321
3212	Detroit City SW	1	1	23%	35%	36%	66%	17,374	17,374
3211	Detroit City SC and SE	26	6	15%	22%	22%	86%	13,751	13,750
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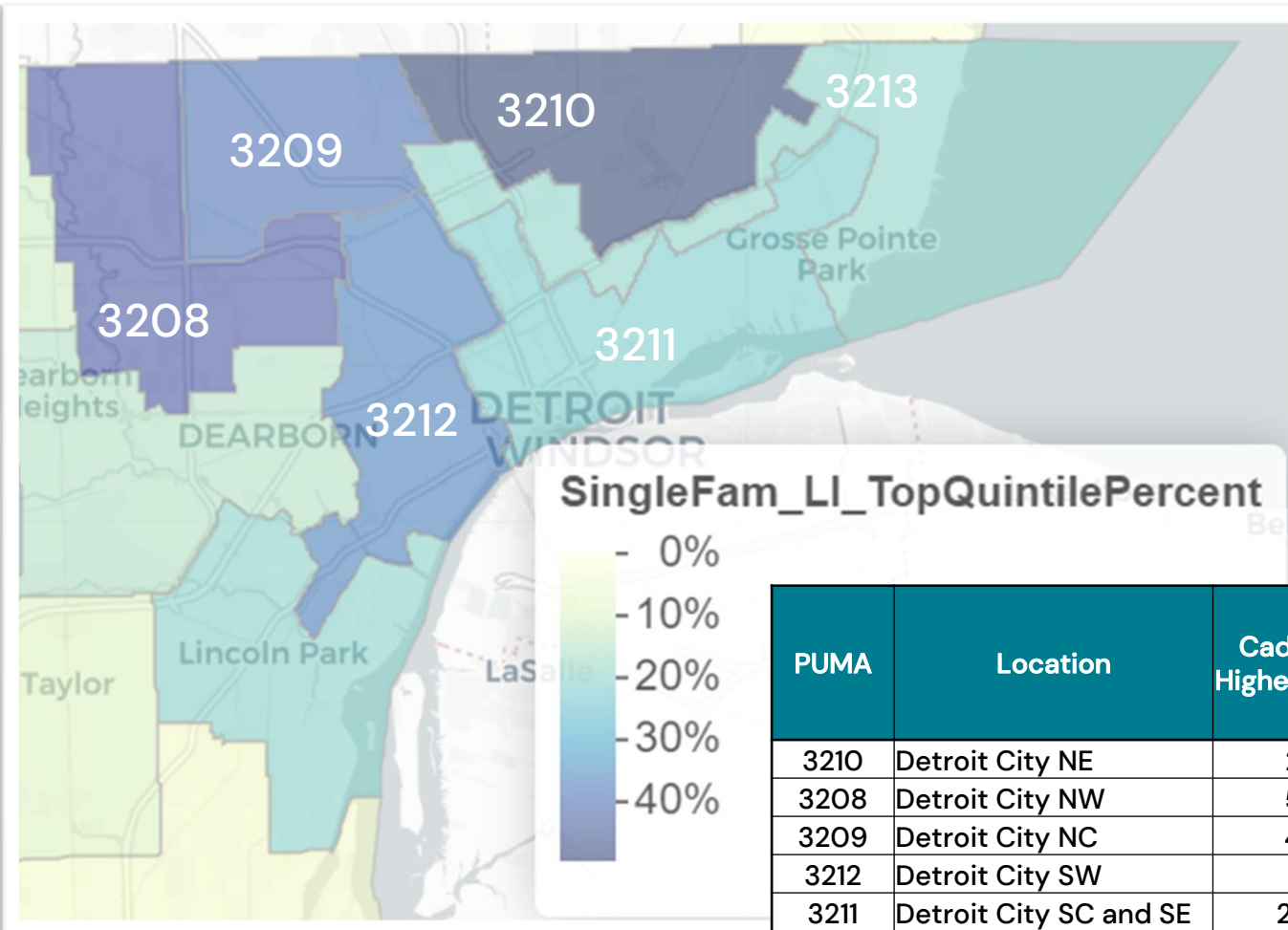
Cadmus Data
ICF Analysis

➔ Phase Two Study Geographic Focus

Composite Need Score is calculated by assigning ranks 1-10 for each customer's energy burden, energy intensity, and income level (reverse scored).



→ Calculation of Composite Need Scores



Ranking by Composite Score:

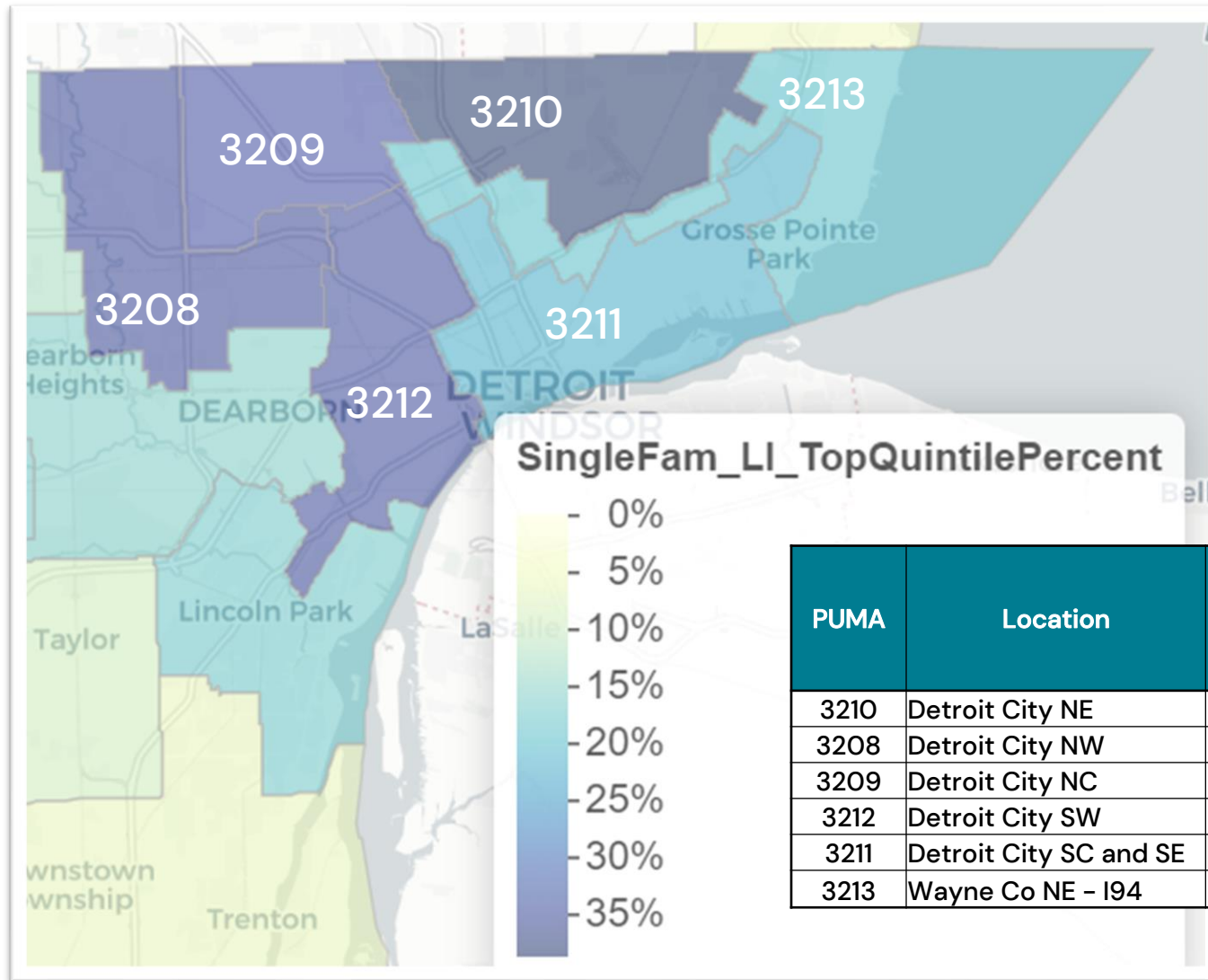
- PUMA 3210 rises to highest priority
- PUMA 3208 next highest priority
- PUMA 3209 rises to third
- PUMA 3212 falls to fourth

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3213	Wayne Co NE - I94	3	2	13%	19%	20%	69%	11,317	11,318

Cadmus Data
ICF Analysis

➔ Phase Two Study Geographic Focus

Top Quintile Single Family, Income Qualified Composite Score



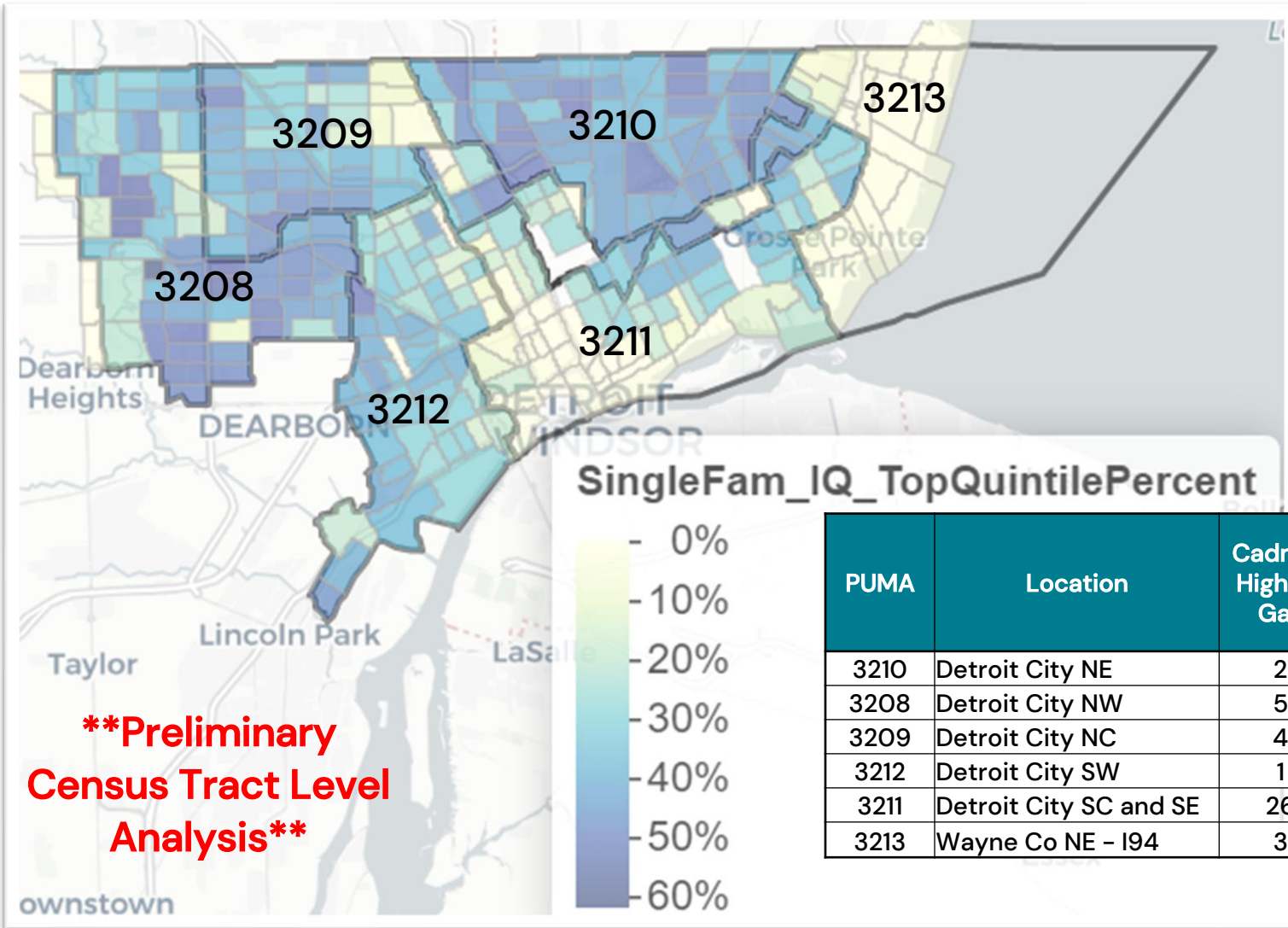
Overlap between ICF and Lewis Testimony Focus

PUMA	Location	Cadmus Highest Gas	Cadmus Highest Elec	(SF, IQ, Top Quintile %)			Census Tract from Lewis Testimony
				Intensity	Burden	Composite Score	
3210	Detroit City NE	2	5	39%	39%	49%	5043
3208	Detroit City NW	5	3	36%	35%	44%	
3209	Detroit City NC	4	4	26%	34%	38%	
3212	Detroit City SW	1	1	23%	35%	36%	5311, 5314
3211	Detroit City SC and SE	26	6	15%	22%	22%	5136, 5139, 5141
3213	Wayne Co NE - I94	3	2	13%	19%	20%	

Cadmus Data
ICF Analysis

➔ Phase Two Study Geographic Focus

Top Quintile Single Family, Income Qualified Composite Score



****Preliminary
Census Tract Level
Analysis****

Geographic Targeting Next Steps:

- Analyze Energy Burden, Intensity, and Composite Score by Census Tract

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				Intensity	Burden	Composite Score	
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3212	Detroit City SW	1	1	23%	35%	36%	5311, 5314
3211	Detroit City SC and SE	26	6	15%	22%	22%	5136, 5139, 5141
3213	Wayne Co NE - I94	3	2	13%	19%	20%	

Cadmus Data
ICF Analysis

➔ **Phase Two Study Geographic Focus**



Next Steps

DTE

- Updates on Mini-Surveys
 - Summaries of Mini-Surveys 1-3 and 4-6
- Phase Three Kickoff and Planning



→ **Next Steps**
