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)
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<th>Team Member</th>
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<tr>
<td>Karen Ehrhardt-Martinez, PhD</td>
<td>Director Behavioral Science and Customer Insights</td>
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<td>Tim Hillman, PhD</td>
<td>Director Analytics and Customer Insights</td>
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<td>Thomas Glendening</td>
<td>Senior Director Residential Programs</td>
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<td>Chris Munn</td>
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<td>Noah Purcell</td>
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<td>Heather Driscoll</td>
<td>Senior Managing Director – Survey Research</td>
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<td>Rachel Kinder</td>
<td>Supervisor – Survey Research</td>
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<td>Lea Lupkin</td>
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<td>Chris Ross</td>
<td>DTE EEA Program Manager</td>
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<td>Annalisa Wilder</td>
<td>DTE Pilots Senior Energy Analyst</td>
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<tr>
<td>Dany Kahumoku</td>
<td>Senior Diversity, Equity, and Inclusion Specialist</td>
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<td>Courtney Barthle</td>
<td>Diversity, Equity, and Inclusion SME</td>
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<tr>
<td>Kristin Catanese</td>
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<td>Steve Younessi</td>
<td>Metric Development Support</td>
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<td>Nolan Hollis</td>
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<td>Kendall Effinger</td>
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<td>Johanna Ortiz</td>
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❖ Jason Kupser
❖ Kevin Bilyeu
❖ Josh Martens
❖ Jeff LeBrun
❖ Jose Goncalves
❖ David Becker

→ DTE Team
Stakeholders

❖ Chinyere Osuala – Earthjustice
❖ Sharonda Williams-Tack – Sierra Club
❖ Elena Saxonhouse – Sierra Club
❖ Alexis Blizman – Ecology Center
Phase Two: Mini-Survey Content Review

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

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Geographic Targeting Process:

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

Phase Two Study Geographic Focus
### Geographic Targeting Process:

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

### Next Level of Analysis:

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

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### Cadmus Data

ICF Analysis

→ **Phase Two Study Geographic Focus**
**Phase Two Study Geographic Focus**

**Top Quintile Single Family, Income Qualified Gas Energy Burden**

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**Cadmus Data**

**ICF Analysis**

**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

Sierra Club Responsive Comments, Docket UD-22-04, Exhibit 8
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
Composite Need Score is calculated by assigning ranks 1-10 for each customer's energy burden, energy intensity, and income level (reverse scored).
Top Quintile Single Family, Income Qualified Gas Composite Score

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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Phase Two Study Geographic Focus
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**Preliminary Census Tract Level Analysis**

**Geographic Targeting Next Steps:**
- Analyze Energy Burden, Intensity, and Composite Score by Census Tract

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Phase Two Study Geographic Focus
Next Steps
• Updates on Mini-Surveys
  o Summaries of Mini-Surveys 1–3 and 4–6
• Phase Three Kickoff and Planning

Next Steps