**CAEECC-Hosted Working Group on Underserved Customers**

**1st Meeting of the Phase 1 WG**

**July 1, 2020, 9-12**

*See Meeting Supporting Documents on* [*Meeting Page*](https://www.caeecc.org/underserved-wg-phase-i-tbd)

*Remote Participation Info at Bottom of Document*

**Facilitators: Dr. Scott McCreary & Meredith Cowart, CONCUR Inc**

**Draft Agenda**

**9:00       Introductions**

**9:10       Background, Goals, and Approach (prospectus)**

* **Background/Scene-setting**
* **Goals**: Identify who is Underserved (in Res and SMB) and ways to address (e.g. through definition of Underserved, reframing HTR, or other means)
* **Approach**: Conduct analysis to identify underserved customers in Res and SMB; identify root causes; and develop recommendations for forum/process to address each type of Underserved customer

**9:30      Review & Revise Proposed Multi-Meeting Strategy**

* Discuss proposed multi-meeting strategy (see *Draft UWG Multi-Meeting Strategy*)
* Query WG Member availability to contribute to investigation

**10:00       Review & Revise USC/NRDC Workplan to Identify Underserved Residential Customers:**

* + Provide overview of workplan
	+ Members review each research question, indicator, measurement and data source, and provide feedback (see *Draft Table: Workplan to Identify Who is Underserved in the Residential Sector*):
		- Research Q 1: Are there gaps in residential energy efficiency program participation by geographic areas? [Proposed Indicators: Participation, Investment, Energy Savings]
		- Research Q 2: Are there gaps in residential program participation by socio-demographic groups (i.e., income, ethnicity, primary spoken language)? [Proposed Indicators: Participation, Investment, Energy Savings]
	+ Members identify any important gaps in the analyses and discuss how best to fill them (either by USC/NRDC team or others)

**11:00       Develop Proposed Workplan to Identify Underserved SMB Customers**

* Develop a strategy and identify the key research questions and indicators, best data sources, and who will do what by when, including:
	+ - Research Q 1: Are there gaps in SMB energy efficiency program participation by geographic areas? [Proposed Indicators: Participation, Investment, Energy Savings]
		- Research Q 2: Are there gaps in SMB program participation by socio-demographic groups (i.e., income, ethnicity, primary spoken language)? [Proposed Indicators: Participation, Investment, Energy Savings]
	+ Discuss next steps

**11:45       Wrap Up/Next Steps**

* Recap approach for next meeting
* Approach to schedule remaining meetings – one each in July, Aug, September

**12:00 Adjourn**

**Remote Participation Info:**

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| **Event address for attendees:** | <https://raabassociates.webex.com/raabassociates/onstage/g.php?MTID=e423a4ce8ab6c6e03b0e16012a8648841> |
| **Event number:** | 126 078 7276 |
| **Event password:** | m38Ui8qfiMD |