



Elevating the Voice of Consumers in Utility & Regulatory Proceedings

Dr. Courtney Henderson

Founder & President, Hawks Peak Strategies
Council Member & Former Mayor

What We Did

The Massachusetts Attorney General's Office of Ratepayer Advocacy supported qualitative consumer research to elevate the voice of income-qualified utility customers to inform its work in two separate proceedings: D.P.U. 23-150, a recent electric rate case, and D.P.U. 24-15, the Department of Public Utilities' ongoing investigation into energy burden and affordability.

Why This Matters



Understand
consumers' lived
experiences



Risk wasting
valuable
resources



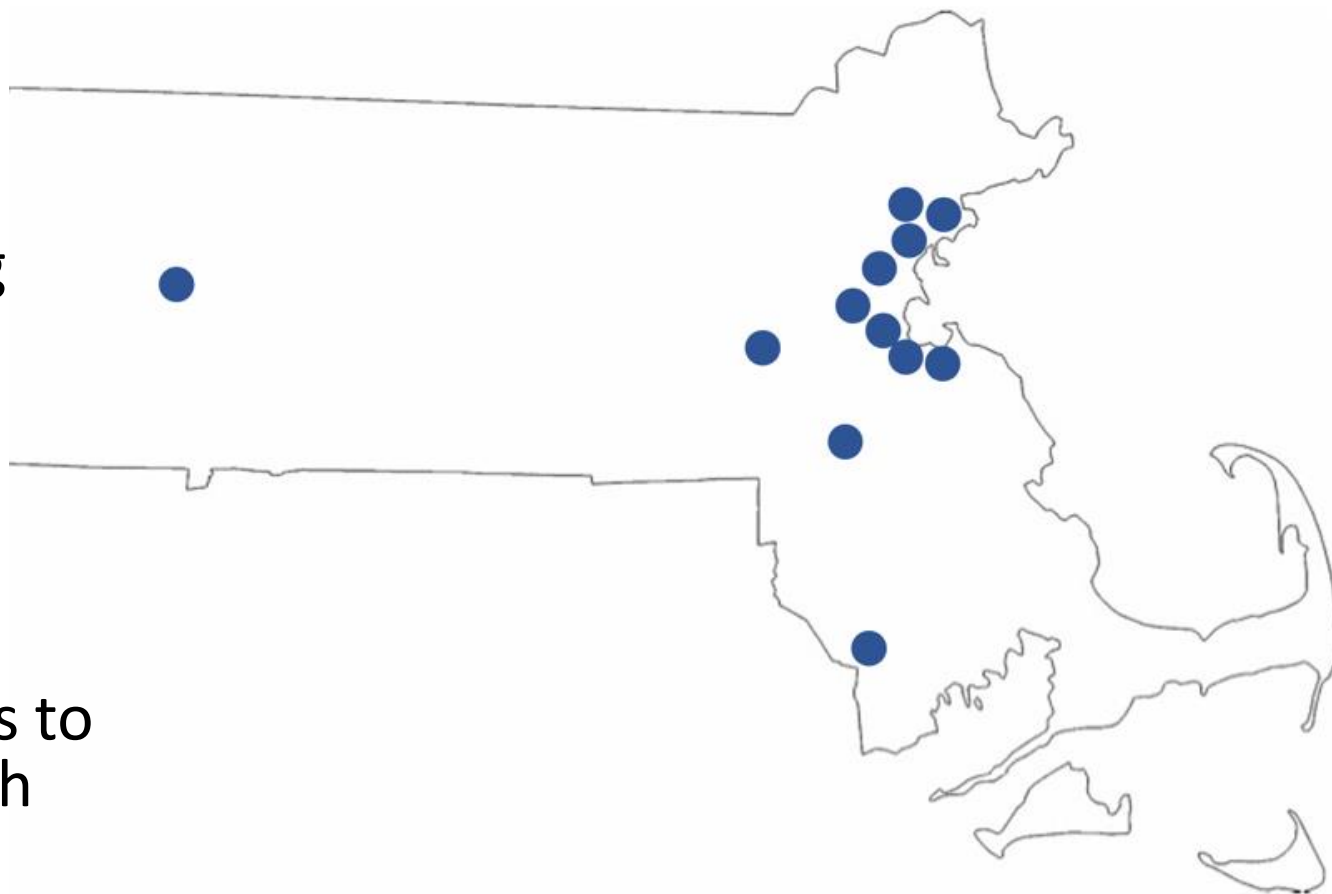
Consumers we
are serving
deserve to be
heard &
understood



Partnerships can
result in new
advocacy

Study Overview

- Understand how consumers manage energy bills
- Understand affordability offering awareness & pathways into solutions
- Map consumer experiences & barriers to enrollment & participation
- Identify opportunities for utilities to better reach & communicate with consumers



Key Insights

- A constant juggle
- Challenging housing conditions & energy-limiting behaviors
- Lack of awareness & participation in LIDR
- Difficulty re-certifying annually
- MEO must meet consumers where they are

**Too cold in winter
and too hot in
summer...and
energy limiting
behaviors were
numerous.**



Lack of LIDR awareness and under-enrollment of qualified consumers.

“I’m uncertain if my application was even received.”

“Didn’t I already apply to a program like that? Why do I have to apply again?”

“The income proof was too hard. I gave up.”

“I didn’t even know I had to re-enroll. No one told me that.”

Communicate application status to customers.

Consolidate application requirements & processes. Find more paths to categorical eligibility.

Consider self-attestation for discount rates.

Identify appropriate re-enrollment periods.



Communication that falls flat.

- “Low-income” doesn’t apply to me; preference for other terms
- Lack of understanding of utility legalese
- MEO must meet consumers where they are

**Use messaging
that aligns with
how customers
perceive
themselves.**





Customer-Centric Language

Instead of “low income”...

- Income-qualified
- Income-eligible
- Struggling with your bills
- Energy assistance
- Families in transition

**Get rid of
legalese...it is
pervasive in
utility customer
communications.**

Arrears forgiveness

**Means-tested
programs**

Arrearage
management



Replace with terms customers easily understand.

- “You may be eligible for payment or bill assistance.”
- “You may be eligible for debt forgiveness.”

Want to save money? Could you use a discount?

If you meet certain criteria, you may be eligible for a discount on your electric rate and/or **arrears forgiveness** — here’s how.

**Leverage data
analytics,
targeting, &
situational
messaging.**

“If you’re falling behind on your bills...”

“If you need help, here is a program for you...”

“We see you’re behind on your bills, this program can help you.”

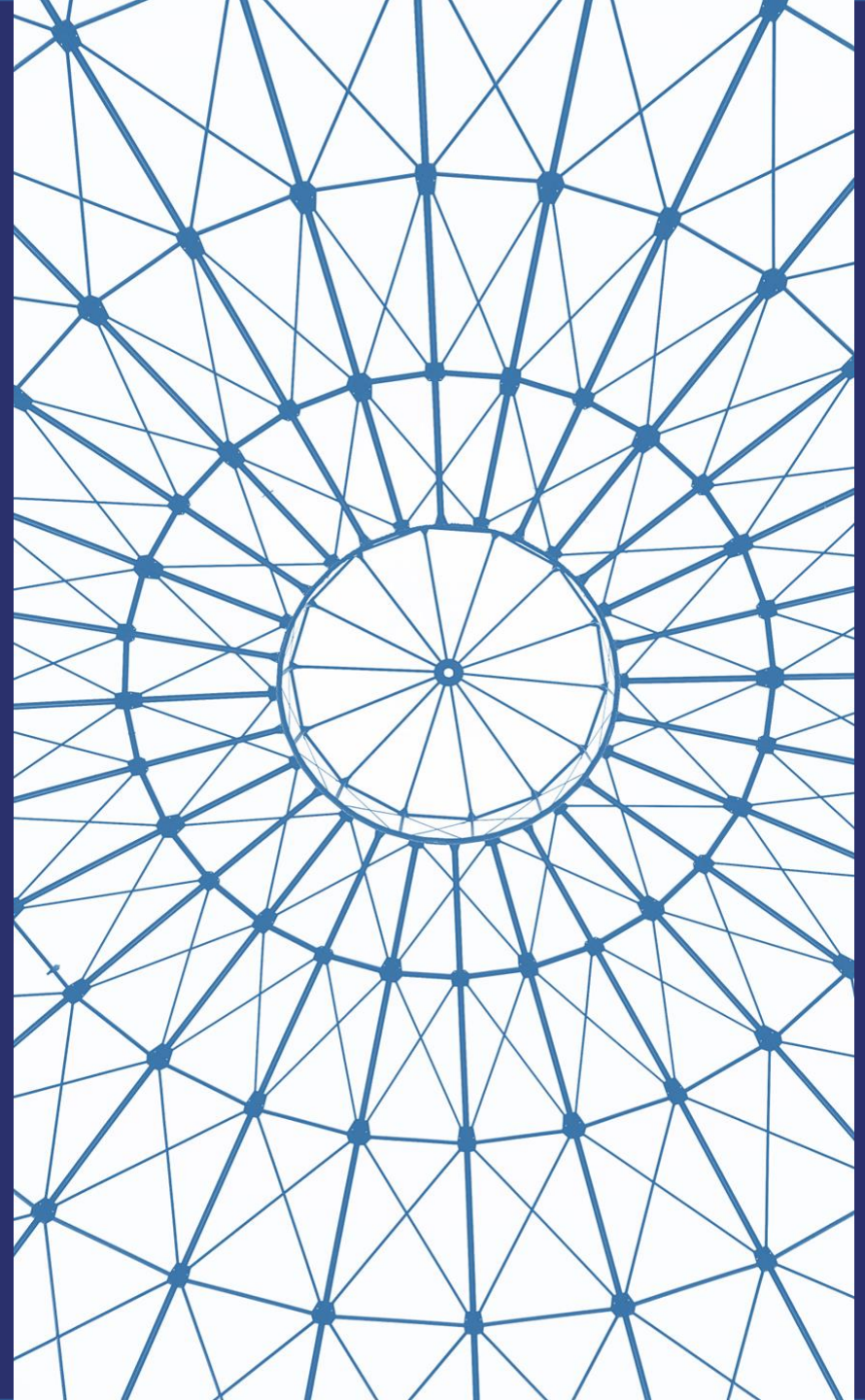
There are many utility affordability offerings...

We can do more to ensure customers receive comprehensive and holistic services.

- Home energy assessments
- Energy efficiency solutions
- Arrearage management / forgiveness
- Discount rates
- Heating assistance
- And more!



Customers do not perceive affordability solutions as discrete offerings.





Streamline affordability offerings.

- Work toward consistency in requirements
- Streamline applications
- Develop data-sharing agreements between utility & state programs
- Develop one-stop affordability shop

AGO Advocacy...Based on Consumer Voices.

- **Need for LIDR enrollment & re-enrollment to be easier for consumers**
 - **Expanded auto-enrollment through data-sharing & categorical eligibility: D.P.U. approved**
 - **Self-attestation pilot to verify LIDR eligibility: D.P.U. ordered a pilot be proposed**
 - **Re-certification of income every 2 years instead of every 1 year: pending, D.P.U. 24-15**
- **Use terms consumers relate to and understand; avoid legalese**
 - **Informally adopted by one utility; pending, D.P.U. 24-15**
- **Standardize some program elements, terms, and names; AGO advocacy in arrearage management plan proceeding, D.P.U. AMP 24-15**

**Work with your consumers,
not against them.**



A woman with dark hair, wearing a dark blue zip-up jacket, is sitting in a black leather office chair. She is smiling and looking towards the camera. Behind her is a wooden plaque with a landscape scene and the text "Incorporated 1993". To the left is an American flag, and to the right is a California state flag and another flag with a bear. The background wall is light-colored with wood paneling.

Get in Touch!

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Bio

Dr. Courtney Henderson is an energy, climate, and health strategist with 20 years of experience in those sectors, as well as the Founder and President of Hawks Peak Strategies, a strategy and consulting firm that provides market strategy, branding and go-to-market services, customer-centric research, policy and regulatory solutioning, and thought leadership in the utility and clean energy sectors. Her work has taken her throughout the United States and as far afield as Western Africa and Northern India. She has extensive experience helping utility companies achieve their energy goals to move toward a cleaner, more equitable energy future, and in public health, supporting organizations in the development of health research infrastructure and improving the provision of healthcare.

Dr. Henderson brings a unique lens to the energy landscape, in that she is also an elected official. In 2020, she was elected to the Truckee Town Council, immediately nominated to Vice Mayor, and subsequently, to Mayor. She is re-running for election this year, and serves on multiple committees, including the Legislative Correspondence Committee, League of California Cities, Truckee Chamber of Commerce, Nevada County Economic Resources Council, Sierra Business Council's Climate Action and Mitigation Partnership, and boards of local non-profits working on climate solutions.

She holds a Bachelor of Science from Cornell University, Master of Public Health from Brown University, and Doctorate in Public Health from the University of California, Berkeley. Courtney lives in Truckee, California where she is also a pro-level mountain bike racer, all-around adventure seeker, and mom to a thrill-seeking seven-year-old boy.

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Work

23-150 Rate Case

- Direct Testimony: <https://fileservice.eea.comacloud.net/FileService.Api/file/FileRoom/18851350>
- Surrebuttal Testimony: <https://fileservice.eea.comacloud.net/FileService.Api/file/FileRoom/19023313>
- Insights Brief: <https://fileservice.eea.comacloud.net/FileService.Api/file/FileRoom/19085226>

Selected Publications & Presentations

- Henderson C (2023). National Association of Regulatory Utility Commissioners. “Data sharing and data availability to improve affordability outcomes: humanizing data.” Webinar.
- Henderson C (2023). California Efficiency and Demand Management Council. “Government leading the way in climate innovation.” Oakland, CA.
- Henderson C (2023). National Energy and Utility Affordability Coalition. “Elevating and equitably engaging hard-to-reach populations.” San Diego, CA.
- Henderson C (2023). EV Driver Experience. “On-the-ground community EV mobilization: what it really takes.” Detroit, MI.
- Henderson C (2023). Midwest Energy Solutions Conference. “Bridging the gap between policy and programs.” Chicago, IL.
- Henderson C (2023). CS Week. “Equitably engaging communities in climate action work.” Charlotte, NC.
- Henderson C (2023). The Antenna Group. “Shaping the future of equitable transportation.” Podcast.
- Henderson C (2023). Behavior, Energy, and Climate Change. “Equitably implementing initiatives in hard-to-reach communities.” Sacramento, CA.
- Henderson C (2022). American Council for an Energy Efficient Economy. “Elevating the voice of rural communities: real-world strategies and solutions for decarbonization and resiliency planning.” Monterey, CA.
- Henderson C. From grid to human resilience: lessons from public health. (2020). *Ingenuity and Resilience, ILLUME*.
- Henderson, C, Dougherty, A. (2016). Is more data a smarter choice? Benchmarking the energy impacts associated with smart meter feedback programs and the techniques used to evaluate them. *International Energy Program Evaluation Conference Proceedings*.
- Henderson C, Dougherty, A. (2015). Learning from public health: embedded evaluation and its applications to energy efficiency. *International Energy Program Evaluation Conference Proceedings*.
- Dethman, L, Schwartz, P, and Henderson, C. (2015). Knowing more sooner: making real time evaluation work. *Association of Energy Services Professionals strategies magazine*.