

Subject: Suggested Actions and the Action Plan

Purpose: To explain the requirements regarding reporting agreed upon customer actions

The purpose of the suggested actions and action plan component is to work with Electric Partnership Program (EPP) customers to get better benefits from their electricity while using less of it. In addition to installation of energy efficiency measures, consumers should agree to perform actions that will assist the household in achieving the Program's purpose. Providers are required to identify in the SMOC~ERS audit software all energy efficiency actions that the *customer* chooses to do. These must be listed on the **Action Plan** page.

As the auditor completes the usage survey with the customer, any possible actions should be flagged.

All of the selected items will appear on the **Suggested Actions** page and these must relate to the Top Ten Usages within the home. The **Suggested Actions** page should be viewed as a preliminary suggestion sheet for the customer to look over. The **Suggested Actions** should be reviewed with the customer after any necessary editing. Editing may involve:

- a) Updating the number of hours that the action will be used.
- b) Ensuring that actions are not listed for items that will be replaced or retrofits performed on. For example, the action may be to keep under-used freezer as full as possible, but the aforementioned freezer is being removed in a "2 for 1" swap.
- c) Ensuring that there are savings associated with the **Action Plan**.

A copy of the **Suggested Actions** page may be printed out to allow the customer to easily view all possibilities. After a discussion between the customer and the auditor, the actions that the customer is willing to perform should be re-edited, if necessary, and then Selected (actions must have a "Selected" status of "Yes" for the data to be included on the **Action Plan** report).

The Action Plan represents the customer's portion of the partnership. For this reason, the customer should sign the **Action Plan**. A signed copy of the **Action Plan** page must be given to the customer, and a second signed copy must be placed in the file. It is also recommended that a printed copy of the **Suggested Actions** page be placed in the file for future reference.

There are no requirements for a specific number of items to appear on the **Action Plan**. However, based on other successful programs, usually between 2 and 5 actions are appropriate.

Every education visit/audit submitted to the OCS for reimbursement must have an **Action Plan**. If there are no selected actions included in the SMOC~ERS survey information, the EPP Provider must submit documentation explaining why there were no actions included in the audit. If this documentation is not provided, the OCS will not reimburse the EPP provider for any costs associated with the education visit/audit.