



# **Thurston Climate Mitigation Collaborative**

## **“Energize Thurston”**

### **Launch and Implementation Plan**

**2024 TCMC Regional Initiative: Energy Efficiency & Electrification Campaign**

**Phase 1 - Campaign Design and Planning**

**Deliverable #3**

Prepared by the Thurston Climate Mitigation Collaborative Staff Team:

Rebecca Harvey, Thurston County  
Julia Downing, USDOE Community Energy Fellow  
Dominic Jones, City of Olympia  
Pamela Braff, City of Olympia  
Linsey Fields, City of Lacey  
Alyssa Jones Wood, City of Tumwater

**WORKING DRAFT**

**OCTOBER 18, 2024**

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## Introduction

The [Thurston Climate Mitigation Collaborative \(TCMC\)](#) prioritized development of a Residential Energy Efficiency and Electrification Campaign as one of its 2024 regional initiatives. The TCMC Staff Team presented a Phase I Project Plan to the Executive Committee and Community Advisory Workgroup (CAW) in January – February 2024. The Staff Team has now completed key tasks in the Phase I plan including [Market Assessment and Incentive Program Research](#), Stakeholder Interviews, and a Resident Survey.

We have named the forthcoming campaign “Energize Thurston” and are moving toward launch and implementation in the first quarter of 2025. Energize Thurston will provide outreach and financial incentives to accelerate residential building decarbonization and reduce energy costs for households throughout the county. The campaign will provide turnkey, subsidized installations of heat pumps and heat pump water heaters (HPWH) for income-qualified participants. It will also provide access to equipment discounts, streamlined installations, guidance, and customer support for all participants regardless of income.

Energize Thurston builds on the foundation of existing local and regional campaigns:

- City of Olympia’s [Energize Olympia](#) campaign, which has provided discounted and subsidized ductless heat pumps to City residents in 2023-2024
- [The Switch Is On](#) web platform, which provides education about electric home appliances and location-based tools to find incentives and vetted contractors.

The Staff Team applied recommendations from the Phase I research to make programmatic decisions about elements of the Energize Thurston campaign. This Launch and Implementation Plan describes the structure and processes for Energize Thurston including Partnerships and Funding, Participant Pathways, Types of Equipment and Services, Campaign Structure and Processes, and Outreach and Marketing Strategy. This plan provides a timeline and a detailed list of tasks and deliverables to guide the launch, implementation, evaluation, and continuation of Energize Thurston.

## Campaign Goals

The Phase I project plan defined the following overarching goals for the energy efficiency and electrification campaign:

- Deliver a compelling and accessible educational campaign to raise awareness of the climate, health, and economic benefits of building electrification and energy efficiency among broad segments of the Thurston community.
- Support energy equity by prioritizing program benefits to low- to moderate-income (LMI) households and members of overburdened communities.
- Connect a quantifiable number of residents with information about technologies, incentives, and advisory support services.
- Implement a quantifiable number of home electrification and efficiency improvements across the participating jurisdictions during the campaign period.
- Maintain program flexibility to respond and adapt to regional, state, and national clean energy programs and investments, with the aim of ensuring ongoing benefits to Thurston residents.

Based on prior outputs of Energize Olympia and considering the currently available funding and geographic scale of Energize Thurston, approximate numeric goals for the campaign are listed below.

- Engage at least 600 residents via community workshops, online and in-person.
- Complete a total of 60-70 subsidized HPWH installations for LMI participants.
- Complete a total of 70-95 subsidized heat pump installations (combination of ducted and ductless) for LMI participants.<sup>1</sup>
- Enable approximately 150 total discounted and streamlined equipment installations for self-funded participants (i.e., we anticipate approximately the same number of LMI and self-funded installations).

## Partnerships and Funding

**Partner Jurisdictions:** The Thurston Climate Mitigation Collaborative (TCMC) is an ongoing partnership among Thurston County and the cities of Lacey, Olympia, and Tumwater to identify and implement regional climate mitigation initiatives including the 2024 initiative Energize Thurston. These jurisdictions along with the city of Tenino each received funding from the State Home Electrification and Appliance Rebates (HEAR) program to support the campaign. Thurston County, Olympia, and Lacey also expect to receive federal Energy Efficiency & Conservation Block Grant (EECBG) funding to support the campaign. The partner jurisdictions expect to enter into an interlocal agreement for joint implementation of Energize Thurston.

**Lead Jurisdiction:** Thurston County will hold the contracts with installation partners on behalf of the partner jurisdictions. The contracts will set the group purchase rate for all participants. The Lead Jurisdiction will have primary ownership of the campaign's execution and administration and will staff the campaign with support from other TCMC Staff Team members and a potential Campaign Administration Consultant.

**Campaign Administration Consultant:** A Campaign Administration Consultant (TBD) may be hired to augment staff capacity through a contract with the Lead Jurisdiction. The Campaign Administration Consultant's scope of work may include assisting with customer support, case management, installer oversight, and/or outreach and education.

**Habitat for Humanity:** South Puget Sound Habitat for Humanity (SPSHFH) will provide integrated critical home repair and weatherization services in coordination with installations for LMI participants, including site assessments and management of subcontracts. Additionally, Habitat for Humanity will support campaign promotion, administration of grant funding for LMI installations, participant recruitment, marketing and outreach efforts.

**Installation Partners:** Installers will be selected through a competitive Request for Proposals (RFP) process evaluating qualifications, experience, pricing, alignment with campaign goals and commitment to customer support. Installation partners will provide information at the educational workshops, conduct free site assessments, offer streamlined access to incentives and rebates, and execute

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<sup>1</sup> Potential supplemental grant funding from partner SPSHFH may add at least 20 more subsidized heat pump installations, for a campaign total of approximately 90-115.

installations for the campaign. Energize Thurston expects to contract with up to five installation partners.

**Puget Sound Energy (PSE):** PSE is the local electric and natural gas utility and provides rebates for energy efficiency retrofits including heat pump and heat pump water heater installations. This includes increased rebates amounts for households up to 90% AMI through the Efficiency Boost Rebate Program. This incentive helps reduce the cost of installations and will allow Energize Thurston to provide subsidized installations to a greater quantity of households. Note: While the TCMC is coordinating with PSE on the design and implementation of Energize Thurston, PSE is not an official campaign partner.

### Project Team Roles and Responsibilities

Name	Organization/Work Group	Role
Julia Downing	DOE Community Energy Fellow (Thurston County)	<ul style="list-style-type: none"> <li>• Campaign Co-Lead</li> <li>• Primary participant contact</li> <li>• Case management and outreach lead</li> </ul>
Dominic Jones	City of Olympia, Building Decarbonization Manager	<ul style="list-style-type: none"> <li>• Campaign Co-Lead (TBD)</li> <li>• Marketing lead</li> <li>• Participant management software lead</li> <li>• Case management and outreach support for Olympia participants</li> </ul>
Rebecca Harvey	Thurston County, Climate Mitigation Senior Program Manager	<ul style="list-style-type: none"> <li>• Contracting lead</li> <li>• Installer and campaign administration oversight</li> <li>• Case management and outreach support for Thurston County participants</li> </ul>
Pamela Braff	City of Olympia, Director of Climate Programs	<ul style="list-style-type: none"> <li>• Campaign advisor</li> <li>• Outreach support</li> </ul>
Linsey Fields	City of Lacey, Climate and Sustainability Coordinator	<ul style="list-style-type: none"> <li>• Case management and outreach support for City of Lacey participants</li> </ul>
Alyssa Jones Wood	City of Tumwater, Sustainability Coordinator	<ul style="list-style-type: none"> <li>• Case management and outreach support City of Tumwater participants</li> </ul>
Amanda Schuyler and TBD	Habitat for Humanity, Construction Coordinator	<ul style="list-style-type: none"> <li>• Installer selection support</li> <li>• LMI intake and case management</li> <li>• Outreach support</li> </ul>
Amit Singh	Puget Sound Energy, Program Manager	<ul style="list-style-type: none"> <li>• PSE Point of Contact</li> </ul>
TBD	TBD Campaign Administration Consultant	<ul style="list-style-type: none"> <li>• Support of case management, installer oversight, outreach, and/or campaign evaluation</li> </ul>

## Campaign Funding

Thurston County and the cities of Olympia, Lacey, Tumwater and Tenino have each been awarded funds through the Washington State Home Electrification and Appliance Rebate (HEAR) Program<sup>2</sup>. The jurisdictions will utilize these funds to subsidize installations of eligible equipment for low- and moderate-income (LMI) households. Since the EECBG funding (described below) is allocated to subsidize heat pump water heater (HPWH) installations, the partners expect that the HEAR funding will be used primarily to subsidize heat pump space conditioning systems. The HEAR program allows up to 15% of the grant funding to be used for administrative costs. This portion of the funding will help to cover SPSHFH's cost of administering the Energize Thurston LMI Pathway.

Thurston County, Olympia, and Lacey have also applied for formula grants through the U.S. Department of Energy's Energy Efficiency and Conservation Block Grant (EECBG) program. This grant funding will be used to subsidize installations of HPWH for qualifying LMI households. The cities of Tumwater and Tenino do not meet the population threshold to qualify for this EECBG formula funding, but the County's allocation can support residents in small cities and unincorporated Thurston County.

Table 1 summarizes the jurisdictions' grant funding sources that directly support the Energize Thurston campaign. Across all five jurisdictions, total funding available to subsidize equipment installations is approximately \$1.7 million. This is anticipated to fund 60-70 subsidized HPWH installations, and 70-95 subsidized heat pump installations (ducted and ductless) for qualifying LMI participants.

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<sup>2</sup> The Home Electrification and Appliance Rebates Program is supported with funding from Washington's Climate Commitment Act. The CCA supports Washington's climate action efforts by putting cap-and-invest dollars to work reducing climate pollution, creating jobs, and improving public health. Information about the CCA is available at [www.climate.wa.gov](http://www.climate.wa.gov).

**Table 1: Jurisdictions’ Grants for Energize Thurston 2025.**

Jurisdiction	Total Grant Funds	HEAR Grants			EECBG Grants
		Total HEAR Grants	Administration Costs	Heat Pump Subsidies	HPWH Subsidies
Thurston County	\$553,303	\$472,263	\$70,839	\$401,424	\$81,040
Olympia <sup>3</sup>	\$603,513	\$481,483	\$72,222	\$409,261	\$122,030
Lacey <sup>4</sup>	\$593,015	\$477,555	\$53,745	\$99,500	\$115,460
Tumwater	\$477,540	\$477,540	\$71,631	\$405,909	\$0
Tenino	\$95,009	\$95,009	\$14,251	\$80,758	\$0
<b>Total</b>	<b>\$2,322,380</b>	<b>\$2,003,850</b>	<b>\$282,689</b>	<b>\$1,396,851</b>	<b>\$318,530</b>

In addition to the grants provided by the jurisdictions, SPSHFH will supplement the campaign by leveraging approximately \$360,000 of their own grant funding from the WA State Department of Commerce HEAR Program to supplement the quantity of heat pump and heat pump water heater retrofits provided to LMI households. These funds will be used to provide integrated weatherization services in coordination with the energy upgrades for LMI participants.

The City of Olympia also expects to allocate approximately \$96,000 in Federal Community Development Block Grant (CDBG) funding for additional heat pump and heat pump water heater installations, as well as weatherization upgrades for low-income participants in Olympia.

## Participant Pathways

### Income Qualifications

Energize Thurston participant pathways are defined based on household gross annual income compared to Thurston County’s area median income (AMI). This is the same metric used by the U.S. Department of Housing and Urban Development (HUD) to determine eligibility for affordable housing. A table of specific income levels for the 80% and 120% AMI thresholds in Thurston County can be [found here](#).

**Table 2: Energize Thurston Income Qualification Levels.**

Pathway	Qualifying Income Levels
Low and Moderate Income (LMI) Pathway	
Fully Subsidized	Less than 80% AMI
Partially Subsidized	At least 80% but less than 120% AMI
Self-funded (Market Rate) Pathway	
	120% AMI or higher

<sup>3</sup> City of Olympia may allocate a some of its HEAR grant towards ductless heat pump installations during the 2024 Energize Olympia program dependent on program demand.

<sup>4</sup> City of Lacey plans to allocate about two thirds of its HEAR grant to the City's existing matching rebate program, and about one third to Energize Thurston.

## LMI Pathway

The Energize Thurston LMI Pathway will provide subsidized equipment and services for low-to moderate income (LMI) households as defined in Table 2. Campaign partner SPSHFH will administer this pathway by contracting directly with installer(s) and subcontractors to coordinate subsidized installations for LMI participants along with site assessments, integrated critical home repair, and limited weatherization services.

Energize Thurston will subsidize the cost of home energy equipment and services for LMI participants at two different levels based on household income qualification:

- Full Cost Coverage for Low-Income: Households under 80% AMI will be eligible for 100% cost coverage of equipment and services. The campaign will reserve at least 60% of available funding for this pool of applicants on a first-come first-served basis.
- Partial Cost Coverage for Moderate-Income: Households with annual incomes of at least 80% AMI but less than 120% AMI will be eligible for partial cost coverage of eligible equipment and services. The exact portion of required household contribution is to be determined but is expected to be capped at \$2,500.

## Self-Funded Pathway

The Energize Thurston Self-Funded Pathway (aka “Market Rate”) will provide a group purchase discount<sup>5</sup> to participants with household incomes of 120% AMI or higher. The exact discount rate will be negotiated with installers during the contracting process. Installers will also be required to include all applicable rebates (from Puget Sound Energy, manufacturers, jurisdiction partners, etc.) as a time-of-sale discount to participants.

In addition to the financial incentives noted above, self-funded participants will have access to further benefits of Energize Thurston:

- Free educational workshops;
- Guidance on additional incentives (e.g., tax credits) and financing;
- Streamlined installation; and
- Customer support.

Jurisdictional staff will administer the self-funded pathway and provide case management and installer oversight.

The Energize Thurston project team may identify local financing providers (e.g., banks, credit unions) with favorable rates/terms that participants may choose to use to finance their projects. Installation partners may also recommend financing products if approved by Thurston County per the terms of their contract.

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<sup>5</sup> Group Purchase discount in Energize Olympia 2024 was 10% discount up to a maximum of \$1,200 off total equipment + labor cost.



## Types of Equipment and Services

After attending an Energize Thurston workshop, participants in both the LMI and Self-Funded pathways will be asked to state on their applications if they request a site assessment for a heat pump space conditioning system, heat pump water heater, or both. They will then be connected to a campaign installer who will provide a free site assessment and recommend the appropriate equipment for their home. The installer will also assess and inform participants of relevant aspects of the building envelope, such as air sealing and insulation, that may affect customer satisfaction and savings from the equipment.

Specific requirements for all Energize Thurston equipment and services will be defined in the contracts between Thurston County and the selected installers. These requirements have been defined to align with Puget Sound Energy’s planned 2025 rebates for heat pumps and HPWH.

### Heat Pumps

Energize Thurston will focus on space conditioning heat pumps because our background research found space heating to be the largest overall consumer of energy for households across all fuel types. Eligible heat pump equipment will include ducted as well as ductless electric heat pumps. For both LMI and Self-Funded participants, the installer will assess the needs of the home and recommend the appropriate heating and cooling equipment for the customer. Installed equipment may replace any type of heating fuel.

Energize Thurston minimum requirements for heat pumps must meet the following criteria:

- Consortium for Energy Efficiency (CEE) highest efficiency tier for 2025:

2025 CEE Split ASHP Specification (DUCTLESS Heat Pumps)					
CEE Level	SEER2	EER2	HSPF2	COP at 5°F*	Capacity Ratio <sup>~</sup>
CEE Tier 1					
Path A	≥ 16.0	≥ 9.8	≥ 8.5	≥ 1.75	≥ 60% at 5°F/47°F
Path B	≥ 16.0	≥ 11.0	≥ 8.0	≥ 1.75	≥ 45% at 5°F/47°F
CEE Advanced Tier					
Refer to the <a href="#">DOE Cold Climate Heat Pump Challenge Specification</a>					

2025 CEE Packaged ASHP Specification (DUCTED Heat Pumps)					
CEE Level	SEER2	EER2	HSPF2	COP at 5°F*	Capacity Ratio <sup>~</sup>
CEE Tier 1	≥ 15.2	≥ 10.0	≥ 7.2	≥ 1.75	≥ 45% at 5°F/47°F

- System must be AHRI Certified as a variable speed heat pump, mini-split or multi-split heat pump and use inverter technology and be a minimum of ¾ ton in heating mode.
- For ductless heat pump only installations, at least one indoor head must be installed in the main living (high-flow) area of the home; bedroom only installations do not qualify for the campaign.

### **Additional Heat Pump Requirements for LMI Pathway**

For participants in the LMI Pathway, Energize Thurston will cover costs of the recommended heat pump equipment plus the following upgrades, which are eligible uses of HEAR grant funding:

- Electric panel upgrades necessary to enable heat pump upgrades
- Duct sealing as needed for installations of ducted heat pump systems

For ductless heat pump systems, the LMI Pathway will cover the cost of up to two ductless heads. At least one indoor head must be installed in the main living (high-flow) area of the home; bedroom only installations are not eligible for Energize Thurston subsidies.

For ducted systems, the campaign will cover the cost of duct repair as required. Installation of new ductwork where existing ductwork was not present is not eligible for Energize Thurston subsidies.

All heat pump installations that are funded with HEAR grants must meet the following HEAR program requirements:

- Remove all fossil fuel equipment where technically and economically feasible.
- All air-source heat pumps must be listed on the Northeast Energy Efficiency Partnership's (NEEP) Cold Climate Air Source Heat Pump (ccASHP) Product List, or meet the most recent ENERGY STAR Cold Climate product criteria.
- All equipment must be ENERGY STAR Certified or CEE North Region Certified.
- All equipment that uses refrigerants must follow the statutory global warming potential (GWP) limits from the Washington State Department of Ecology and the U.S. Environmental Protection Agency (EPA), and where technically and economically feasible, must use low GWP refrigerants listed by the EPA's Significant New Alternatives Policy (SNAP) Program, or the California Air Resources Board (CARB).

### **Heat Pump Water Heaters**

The campaign will also incentivize heat pump water heaters (HPWH) because our background research found water heating to be the second largest natural gas end use for residential homes in Washington State. HPWH have also been shown to be more cost effective for homeowners when replacing an existing electric water heater.

For both LMI and Self-Funded participants, the installer will assess the needs of the home (in coordination with SPSHFH for the LMI Pathway) and recommend the appropriate water heating equipment for the customer, which may or may not be a HPWH. As for heat pump space heaters, the installed equipment may replace any type of heating fuel.

Energize Thurston's requirements for heat pump water heaters:

- Must be Northwest Energy Efficiency Alliance (NEEA) Tier 3 or 4<sup>6</sup> heat pump water heater

### **Additional HPWH Requirements for LMI Pathway**

For participants in the LMI Pathway, Energize Thurston will cover costs of a HPWH if it is recommended by the selected installer as appropriate water heating equipment for the site. The campaign may include an age requirement for water heater replacement (e.g., equipment is 10 or more years old; TBD). In addition to the equipment costs, Energize Thurston will cover costs of electrical upgrades to accommodate HPWH installation when needed in LMI households.

All LMI installations that are funded with HEAR grants must meet the following HEAR program requirements:

- Remove all fossil fuel equipment where technically and economically feasible.
- All equipment must be ENERGY STAR Certified or CEE North Region Certified.
- All equipment that uses refrigerants must follow the statutory global warming potential (GWP) limits from the Washington State Department of Ecology and the U.S. Environmental Protection Agency (EPA), and where technically and economically feasible, must use low GWP refrigerants listed by the EPA's Significant New Alternatives Policy (SNAP) Program, or the California Air Resources Board (CARB).

## Campaign Structure and Processes

### Contracting Structure

Energize Thurston will follow the “installer model” used by Energize Olympia, in which program installers are selected by evaluating price and qualifications through a competitive bidding process. The lead jurisdiction will issue a Request for Proposals (RFP) to select qualified contractors to provide installation of ducted and ductless heat pumps, heat pump water heaters, and associated electrical work. The partners anticipate needing approximately four to five contracted installers to serve Energize Thurston. Selected installers will be required to provide a fixed group-purchase discount for all installations, and to apply all applicable rebates as a time-of-sale discount to participants. Thurston County will hold a contract with each selected installer to set the group purchase rate. Self-funded participants will contract directly with an installer as described in the “Applicant Process” section below.

Habitat for Humanity will contract with the same suite of selected installers, who will be required to apply the same discounts for the LMI installations as for the self-funded installations. Each of the partner jurisdictions will enter into a contract with Habitat to allow them to administer the LMI installations using funding provided by the jurisdiction.

The County will also issue an RFP to select a Campaign Administrator consultant (TBD), who will support case management, installer oversight, outreach, and/or campaign evaluation.

The contracting structure for Energize Thurston is illustrated in Figure 1 below.

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<sup>6</sup> Refer to NEEA Advanced Water Heating Specification 8.1 for information on HPWH Product Tiers

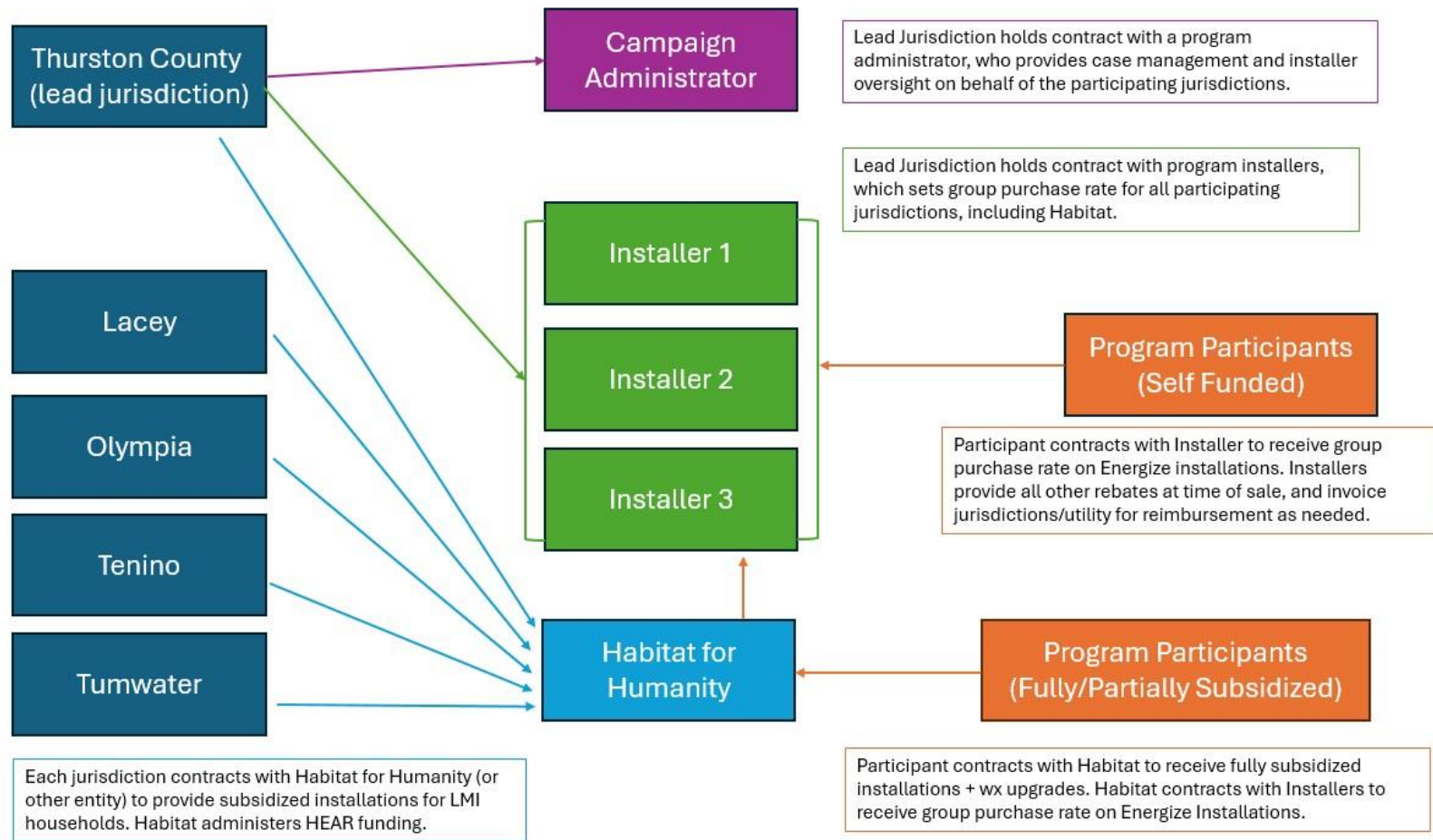


Figure 1. Energize Thurston Proposed Contracting Structure.

## Applicant Process

All participants will progress through the Energize Thurston campaign as follows:

- Sign up for and attend a campaign workshop (either in-person or virtual).
- Submit a campaign application that includes their general information and the following:
  - Whether they are applying for the LMI Pathway or the Self-Funded Pathway; and
  - If they request a site assessment for a heat pump space conditioning system, heat pump water heater, or both.
- Campaign staff will verify site eligibility and request income eligibility information from LMI Pathway applicants.
- Campaign staff will provide the participant with a status update and notify the installer that the participant is ready to schedule a site assessment.
- LMI Pathway:
  - The installer will work with Habitat for Humanity and the participant to schedule a site assessment, recommend the appropriate equipment, and provide a quote. If the participant chooses to move forward, the installer will contract with Habitat for Humanity to complete the installation. The installer will provide all available rebates and incentives at the time of sale, including the Energize Thurston campaign pricing.
  - Moderate-income households (80%-120% AMI) will pay their household cost share to SPSHFH. Payment plans are available.
- Self-Funded Pathway:
  - The installer will contact the participant to schedule a site assessment, recommend the appropriate equipment, and provide a quote. If the participant chooses to move forward, the installer will contract directly with the participant to complete the installation. The installer will provide all available rebates and incentives at the time of sale, including the Energize Thurston campaign pricing, as well as direct participants to program-approved financing options. The campaign staff team will support self-funded participants by offering customer support throughout the installation process.

## Participant Management System

The partners will follow the model used by Energize Olympia for participant tracking and case management. “Monday.com” software will serve as a platform for project and task management, providing a streamlined system to track participant applications and partner tasks all in one place. The Staff Team will modify this system as needed to accommodate the expanded multijurisdictional campaign. We will refine and document the participant intake process for the LMI and self-funded pathways; train all campaign partners and installation partners on the use of the tracking software; and assign roles and responsibilities for case management, customer support, and installer oversight. We will host regular meetings with all campaign partners to ensure installers are meeting all contract deliverables and installation timelines, and address case management issues as they arise.

## Outreach and Marketing Strategy

Energize Thurston will build upon the existing “Energize Olympia” brand and will expand outreach and marketing efforts countywide through a variety of methods as described below. Following the

recommendations from background research, outreach will target both rural and urban areas with messages emphasizing environmental, health and safety benefits of electrification, as well as concerns about electric appliances cost and performance.

Energize Thurston will focus on reaching underserved and disadvantaged communities via targeted outreach and supportive program implementation. Target communities will include low-income households, communities of color, immigrants, seniors, first-time homeowners, and people on utility support programs, among others. Campaign staff will aim to develop partnerships with community-based organizations to leverage trusted networks that support these communities. A list of Community Outreach Partners will be included in the Energize Thurston Communications Plan.

**Educational Workshop Series:** Campaign staff, SPSHFH, and campaign installers will educate residents of Thurston County on the benefits of electrification appliances and services through a free series of educational workshops. The workshops provide information on the benefits of heat pump technology, residential energy efficiency, an overview of the program pathways and installation process, as well as information on the many available financial incentives including federal tax credits, and local utility incentives from Puget Sound Energy. The partners will host multiple in-person workshops across the county as well as an on-demand workshop to expand the accessibility of events.

**TCMC Website:** The TCMC website ([Thurstonclimatecollaborative.org](https://Thurstonclimatecollaborative.org)) will serve as the primary hub for interested residents to access Energize Thurston campaign information. The site will include information about in-person and on-demand workshops, participant eligibility criteria, FAQs, and contact information for the campaign's point of contact.

**Switch Is On (SIO) Website:** The Energize Thurston Campaign will build on an existing outreach and marketing campaign that was launched regionally in 2024 via the [wa.SwitchIsOn.org](https://wa.SwitchIsOn.org) web platform. The Switch Is On (SIO) website serves as a central information hub for residential home electrification. It educates residents about home electrification benefits and technologies and provides tools to find vetted contractors and available incentives.

**Outreach at Community Events:** Campaign staff and SPSHFH staff will provide targeted outreach to community groups throughout Thurston County. This will include informational presentations for cultural organizations, faith-based organizations, and neighborhood associations, as well as tabling at local businesses, trade shows or community events.

**Distribution of Marketing Materials:** Physical marketing materials will be distributed around the County including post cards, flyers and street banners at central hubs in the community. Campaign staff will also regularly post online updates on the status of the campaign through partner jurisdictions' e-newsletters and via social media platforms such as Facebook, Instagram, Threads, X, Nextdoor, and/or Reddit.

**Outreach Partnerships and Volunteers:** Energize Thurston will leverage trusted community partners to engage members of target communities. Staff will maintain a list of Community Outreach Partners and track engagements before and during campaign launch. Campaign staff will work with partners to recruit community volunteers ("Energize Ambassadors") to assist with distribution of marketing

materials throughout the County. Early recruitment of volunteers can build greater awareness of the program, natural engagement of community partners, and opportunities for press coverage.

**Translation and Interpretation services:** The partners will set aside marketing budget to translate outreach materials and the on-demand workshop into Spanish; and to provide interpretation services as needed throughout the campaign.

**Post-Installation Education:** All participants will receive an educational packet providing information on how to use and maintain their newly installed equipment as well as a reference to the sources of funding that helped subsidize their installation.

## Campaign Timeline, Tasks and Deliverables

To launch the Energize Thurston campaign in Q1 2025, the Staff Team will aim to complete the following project tasks by the end of 2024.

### **Step 1: Contract with Energize Thurston Partners (October – December 2024)**

*This step includes executing an interlocal agreement among the jurisdiction partners for joint implementation of Energize Thurston, conducting a competitive solicitation for installation partners, and contracting with administrative partner South Puget Sound Habitat for Humanity. The jurisdictions may also contract with a campaign administrator to augment staff capacity (TBD).*

#### *Tasks:*

- 1.1 Execute Energize Thurston 2025 Interlocal Agreement (ILA)
  - Define roles and responsibilities of each jurisdiction partner
  - Develop collaborative budget for campaign launch and implementation
  
- 1.2 Lead Jurisdiction: Issue Request for Proposal (RFP) for installation partners
  - Develop scope of work and scoring rubric for Energize Thurston installation partners
  - Publish and promote RFP
  - Establish Installer Selection Committee and review proposals
  - Contract individually with up to 5 installers that are selected through the RFP process
  - Negotiate Energize Thurston group purchase discount with selected installers
  
- 1.3 All jurisdictions: Contract with South Puget Sound Habitat for Humanity (SPSHFH)
  - Each jurisdiction executes contract(s) with SPSHFH to provide grant funding for subsidized installations for LMI households
  
- 1.4 (TBD) Lead Jurisdiction: Contract with campaign administrator (consultant)
  - Refine scope of work for campaign administrator
  - Issue RFP and select consultant
  - Contract with consultant

#### *Step 1 Deliverables:*

- Energize Thurston 2025 ILA

- Contracts with up to 5 installation partners
- Contracts between SPSHFH and each jurisdiction
- (TBD) Lead jurisdiction contract with campaign administrator

**Step 2: Develop Communications Plan and Outreach Materials (October – December 2024)**

*Energize Thurston will leverage existing Energize Olympia outreach materials and communication strategies, and modify them as needed for the expanded program. This step includes producing the new marketing assets, developing a communications plan and tracking system; establishing outreach partnerships, and developing a framework for the educational workshops.*

*Tasks:*

- 2.1 Design Energize Thurston marketing materials
  - Work with Energize Olympia designer to revise materials for Energize Thurston
  - Develop content for campaign website
  - Compile weatherization information packet to provide participants (TBD if staff capacity allows)
- 2.2 Develop Communications Plan
  - Build the Outreach & Marketing Strategy into a detailed campaign Communications Plan
  - Determine number and locations of in-person workshops
- 2.3 Establish outreach partnerships
  - Develop list of CBOs and outreach partners
  - Contact outreach partners to initiate relationships and engage potential volunteers
- 2.3 Design Energize Thurston workshops
  - Build off existing Energize Olympia workshops to add new technologies, application processes, and information about the multijurisdictional campaign
  - Provide Spanish translation of workshop subtitles; and explore other options for translation/interpretation of on-demand workshop

*Step 2 Deliverables:*

- Energize Thurston brand and marketing materials
- Energize Thurston webpage
- Energize Thurston Communications Plan
- Tracking system for outreach activities and partner engagement

**Step 3 – Develop Participant Application and Tracking System (November 2024 – January 2025)**

*This step involves modifying Energize Olympia’s participant application and tracking system for the expanded multijurisdictional campaign.*

*Tasks:*

- 3.1 Develop application materials and process
  - Revise Energize Olympia’s application as needed for expanded campaign
  - Develop participant intake/tracking process for LMI and self-funded pathways
- 3.2 Set up participant tracking system in Monday.com software
  - Expand existing system to track participants across multiple jurisdictions



- Establish project and task management boards in Monday.com
- 3.2 Train campaign partners on tracking system
- Host kickoff meeting with campaign partners, SPSHFH, and installation partners
  - Assign roles and responsibilities for case management, customer support, and installer oversight
  - Establish weekly check-in schedule with all campaign partners

*Step 3 Deliverables:*

- Final participant application
- Guidance document on Participant Tracking Process
- Complete project, task management system in Monday.com

**Step 4 – Implement Campaign (est. February – June 2025)**

*Tasks:*

- 4.1 Implement communications and outreach plan
- 4.2 Conduct in-person workshops
- 4.3 Record virtual “on-demand” workshop and post online
- 4.4 Implement participant intake and management process
- 4.5 Provide customer support and case management
- 4.6 Conduct oversight of installers and partners
- 4.7 Track and report on progress toward goals

*Step 4 Deliverables:*

- Campaign Outcomes
  - Workshop registrations
  - Workshop attendances
  - Participant applications
  - Completed installations for LMI Pathway
  - Completed installations for Self-Funded Pathway

**Step 5 – Develop Campaign Continuation Plan (est. July - September 2025)**

*Tasks:*

- 5.1 Document and evaluate processes and partnerships developed in the pilot campaign
- 5.2 Develop a plan for continuation of the campaign in alignment with related federal, state, and regional initiatives.
- 5.3 Develop recommendations for expanding the program to further enhance benefits to disadvantaged communities.

*Step 5 Deliverables:*

- Energize Thurston Evaluation Report
- Energize Thurston Continuation Plan