

Customer Education Checklist

Before the Audit - In the Home - On the Day of the Audit

- 1. Explanation that the program includes a:
 - Free BPI Audit
 - Recommendations for Energy Improvement Measures
 - Programmable Thermostats (optional)
 - Financial Incentives – Prebates
 - Post Inspection
- 2. Explanation of what will happen during the audit

During the Audit

- 3. Encouragement of customer to participate throughout the audit
- 4. Explanation of findings during the audit

After the Audit - at the Kitchen Table

- 5. Summary of what was done during the audit
- 6. Explanation of specific findings and recommendations
- 7. Explanation that the measures will reduce the energy usage and bill (be specific when possible)
- 8. Explanation of the value of the measures in terms of savings
- 9. Explanation that the next step is up to the customer-there is no obligation to make the improvements
- 10. Explanation that the audit recommended measures are not free; however Columbia does provide some financial incentives
- 11. Explanation that Columbia has free financial incentives called “prebates”
- 12. Explanation that a “prebate” is a discount off of the hired contractor’s invoice
- 13. Explanation of the “prebate amounts” – Give a copy of “prebate” example
- 14. Give the customer “prebate” forms – 1 for each measure

- 15. Explanation that the customer can hire the contractor of their choice to do the work
- 16. Explanation that if the hired contractor wants to take advantage of the “prebates” they must choose a contractor on Columbia’s contractor list or have their contractor sign up with Columbia to be on the list
- 17. Explanation that the contractor must be lead safe certified by EPA to be on Columbia’s contractor list.
- 18. Provide the customer with a lead safe booklet on choosing a contractor, have customer sign the booklet form and return it with audit forms.
- 19. Explanation of what a contractor must do to sign up with Columbia to be on their contractor list;
 - Have contractor call CCI at 412-431-4449 ext. 249 before the work is done
 - Contractor must have PA Contractors Registration Number
- 20. Explanation that the customer must give the hired contractor a copy of the “prebate form” for each measure completed
- 21. Explanation that this form must accompany the hired contractors invoice and that the invoice for the prebate amount must be mailed to:

Conservation Consultants, Inc. (CCI)
64 South 14th St.
Pittsburgh, PA 15203
- 22. Explanation of other resources available through:
 - Electric Utilities – Give rebate forms if possible
 - ARRA Programs as available
 - Other programs as available
 - PA State Keystone Help Program Brochure
 - Information about Federal Tax incentives
- 23. Explanation that auditor will come back out and do a post inspection of the audit after the measures are completed
- 24. Explanation that the customer must contact CCI at 412-431-4449 Ext 249 to request a post inspection after the measures are completed.
- 25. Encourage additional questions from the customer
- 26. Explanation that the customer can contact CCI 412-431-4449 Ext 249 anytime if they have questions on any of the things explained.

Auditor’s
Signature _____ **Date** _____

Customer’s
Signature _____ **Date** _____