

# November 2020 Low-Income Energy Efficiency Workgroup

November 17, 2020 | Meeting Notes | Virtual meeting

This webinar was primarily an introduction of the Comfort Ready Home Program and to discuss how this program can support Low-Income services.

**Facilitators and Speakers:** Amy Burke (BPA Low-Income Program Manager), Rob Burr (BPA Program Manager), Charlotte Morrow (Evergreen Program Manager), and Jess Kincaid (BPA Residential Sector Lead)

**Presentation slides** for this workgroup [can be found here](#) and on [BPA's Low-Income page](#).

## Attendance:

Alicia Harmanson, Lewis County PUD	Jason Bird, Idaho Falls Power	Pat Didion, City of Milton-Freewater
Amanda Rains, WA State Weatherization	Jeff Feinberg, Snohomish PUD	Paul Hawkins, BPA
Amy Burke, BPA	Jennifer Joly, Oregon Municipal Electrical Utilities Association	Randall Olsen, Community Action
Andrea Weathers, BPA	Jeremy Stewart, Tacoma Power	Renee Coelho, Avista
Anita Clever, Klickitat PUD	Jess Kincaid, BPA	Rob Burr, BPA
August Burns, Evergreen	Joe Hull, Midstate Electric Cooperative	Ryan Westman, City of Milton-Freewater
Brent Barclay, BPA	Jonathan Hardy, Clark PUD	Sandy Sieg, Puget Sound Energy
Cathy Anderson, Snohomish PUD	Juan Serpa Muñoz, EWEB	Sara Bowles, Tacoma Power
Charles Schifferdecker, EWEB	Keith Kueny, Community Action Partnership of Oregon	Sara Bernards, McMinnville Water & Light
Cheryl Paoli, Idaho Power	Kelly Haugh, Big Bend Electric Coop	Seth Kolodziejski, Washington State Weatherization
Clint Stewart, Puget Sound Energy	Kevin Watier, Snohomish PUD	Shawn Collins, Opportunity Council
Colleen Neel, Cowlitz PUD	Kimberly Johnson, Okanogan PUD	Steve Jole, Homes for Good
Dan Kinnaman, Grays Harbor PUD	Koral Miller, Mason PUD 3	Suzi Asmus, NEEA
Dawn Senger, City of Richland	Lindsey Hobbs, Inland Power	Tara Morrow, Olypen
Debbie Swanson, ESG	Marietta Doney, Oregon Energy Fund	Tara Maynard, Grays Harbor PUD
Dena Hilde, BPA	Mark Ralston, BPA	Thomas Elzinga, Consumers Power, Inc.
Drew Sizemore	Mattias Jarvegren, Clallam County PUD	Tim Lammers, Columbia River PUD
Eric Hector, Grant PUD	Melissa Podeszwa, BPA	Tina Workman, Salem Electric
Eugene Rosolie, NEEA	Mike Selig, Clark PUD	Todd Williams, Inland Power
Greg Huebner, BPA	Mike Porter, Evergreen	Travis Wood, Umatilla Electric
Heather Moline, NW Energy Coalition	Mike Gross, BPA	Travis Hardy, Northern Wasco County PUD
Helen Duewell, Springfield Utility Board	Nancy Philipp, Benton PUD	Vince Schueler, WSU Energy Extension
Jan Dean, Fall River Electric Cooperative	Nell Patten, BPA	

**Announcement: This was sadly Steve Jole's last Low-Income workgroup. Thank you for all your work and passion through all the years, Steve!!** This means there is an opening on the Low-Income Workgroup Steering Committee for a non-Utility position. We are looking for anyone from a state agency or a non-profit implementer. This position is already filled for Washington so we would ideally consider someone from Oregon, but we will also consider applicants from Idaho and Montana. [Click here for more information about the steering committee](#). If you are interested in joining, please email Amy Burke at [aaburke@bpa.gov](mailto:aaburke@bpa.gov) just one or two paragraphs about who you work for, how Low-Income EE relates to your work, your past involvement in the workgroup, and why you want to be on the Workgroup Steering Committee. We would love to hear from you!

## The Low-Income New Opportunities Guide

The [Low-Income New Opportunities Guide](#) is posted on the BPA's [Low-Income](#) and [Weatherization](#) pages. This is an excellent resource for current grantees and anyone interested in participating and building relationships. There is great information about funding sources, contact information for state agencies, some guidance around income qualification, and a few examples of acceptable project documentation. Some minor clarifications were made since this was published this fall. These are non-substantive and are in the updated version posted online. If you see any missing information or a necessary correction, please reach out to Amy Burke at [aaburke@bpa.gov](mailto:aaburke@bpa.gov).

## Comfort Ready Home Presentation & Discussion



The Comfort Ready Home program offers support to utilities, contractors, agencies, and homeowners to help communities become more energy efficient through improved weatherization, HVAC, and water heating measures. Participation and all services are free of charge and participants have the option of picking and choosing what services they would like to use in their programs. Support services include online training that anyone can access 24/7, dedicated field specialists, a suite of marketing resources, technical references, lead generation, and a dedicated website featuring a utility and contractor search function. Small and large group in-person trainings will be offered when it is safe to do so.

The program's field specialists will work with interested utilities and agencies to develop a plan for what services they would like implemented in their service territory. The program's top priority at the outset is working to recruit contractors to the program and providing them with the information and technical skills to perform the work. Once there are enough people to do the work, the focus will pivot to how to communicate more effectively about what income qualified means. We want to direct homeowners with various incomes to programs that will work best for them. We want to hear from the CAAs and state agencies on any guidance you have on this.



We don't have specific information about how many income qualified programs have open contractor lists due to the sheer number of agencies. However, it appears that participating CAAs and tribes have right-sized their contractor network to meet their needs so far since the budgets have historically been able to spend all of their budget. It's a matter of figuring out how to meet any additional contractor infrastructure needs for these measures.

### **Low-Income Coordination: How can Comfort Ready Home support you?**

General feedback was supportive of the program services from the folks who spoke. A good point was made that since there is some risk of overlapping with utilities that already have programs, coordination is important so mixed messages aren't sent out to the public. Participants need to work closely together to offer a seamless customer and contractor experience since there is the potential to make something spectacular.

Utilities that already have robust contractor networks already do this work without BPA's help and might not need all the services the program will offer. For utilities with a robust trade ally network, there are services they can still use including but not limited to multifamily project support and contractor training. Each utility will use this program differently and that can be defined. Quite a few utilities that need help developing contractor and trade ally lists, and that is where the program can step in. Ultimately, the program can manage the weatherization programs for some utilities and just be a training resource for others. We will work with utilities one at a time to understand what the program looks like in their territories.

Third party income verification (non-CAP) has been a bandwidth challenge for a couple utilities. It looks like there are successful CAAs doing income qualification for utilities and referring the homeowner to a third-party service. For other utilities without the bandwidth to coordinate with their CAA to do income qualification, the program is considering offering that service, though that will be down the road. If there is a need for additional support for income qualification for low-income weatherization per utility, the program may be able to step in and assist. However, the program needs to be fully implemented before doing that.

### **What resources should we build out to help you deliver your program, how can we meet your support expectations, and are there services or areas of the program that could create any challenges for you?**

Question was asked that to help utilities keep their weatherization programs and pay more to contractors to do extra work, is BPA considering new standards to address savings per unit or are utilities going to be able to claim extra savings for that? BPA adopts savings directly from the Regional Technical Forum (RTF) where the RTF has calculated the savings for a particular

measure. After launching, the program is going to focus on getting contractors to perform air sealing with insulation. Our expectation is when we evaluate insulation two years from now, we will see the savings go up due to higher quality work. These are down the road energy savings after the program has been on the ground for a year. The field guide and training modules are very specific about how to install the measure and what other measures it pairs well with and we think it improves the business case for contractors.

*Can radio scripts be added to help utilities with uniform messaging?* This was not in the initial marketing plan, but it is definitely something the program team will explore further.

***Do you want or need support bringing on more contractors?***

For some there is no shortage of contractors, but there is a shortage of projects to get contractors back up to pre-COVID capacity. Electricians and plumbers are particularly in high demand and many HVAC installers aren't competing with other markets. To complete some of the low-income work, WA pulls contractors from the non-Low Income network. Some companies laid off their contractors and want more work to justify hiring them back. Many of our customers would like to have non-low-income work.

For the non-Low Income work, the utility pool of contractors has seemed to have gotten busier since COVID and it is hard to find enough contractors. The Wx assistance program can be timed differently with the ebb and flow of the standard market so the program can do a lot more information sharing. BPA is keeping constantly analyzing where the load and potential will be (i.e. what the COVID/post COVID economy will look like, where will new homes come into the grid, etc...).

***What information would you like Field Specialists to have on hand for contractors and homeowners who might qualify for free services through income-based programs?***

There will be strategies for incentivizing contractors to do the low-income work. Through homeowner education and resources, contractors will have access to homeowners who know what services they need, the approximate incentive amounts, and the general install cost range. Eventually when there are more participating contractors, homeowners will be able to go on the website to learn more about if and how they need energy efficiency upgrades. There will be a filter option noting free services for folks who need it. This would mean a contractor won't ever see them if they qualify for a free service. These are not cold calls to contractors and they will have a much higher rate of completing work.

The Opportunity Council addresses incentivizing low-income work through offering a discount on their energy bill or additional rebates, particularly for senior households. Terminology matters when offering these deeper incentives and discounts. If anyone with more experience than BPA can suggest what approach works better than "Low-Income" or "Income-Qualified", please send them our way since we know words matter.

*When a Field Specialist is out promoting, do they promote utility incentives or BPA incentives?* It will be the utility incentives. Unless the utility tells us not to, the goal is to gather the utility contact and give that information to contractors for them to reach out about utility incentives.

***Would you like your contact information added to our website or Field Guide insert?***

There is a changing landscape in Washington with eligibility and the definition of low-income. Changes will be happening about who qualified starting in July 2021. We will cover that more in the next low-income workgroup.

***Do you have staffing resource needs for multifamily project management that our program can support?***

A challenge with multifamily is one project can take a big chunk of the annual budget to complete so planning, budgeting, and getting the contractors in place is challenging. Working with commerce and the local housing authority can help to identify properties. The program might be able to help with this. An idea is where the utility and CAA are targeting multifamily, maybe the field specialists with that intersection and figure out which measures can be paid for using low-income or non-low income funds to help with project and budget planning and management to help stretch budgets further.

One work around about planning for multifamily projects that are complexes using federal dollars is to go by building instead of by complex to stretch budgets. The requirement is to complete a project but the definition is by building. Stretching across a couple of years can complete a larger multifamily project by doing 1-2 units in a building per year.

### ***What other topics or issues would you like to discuss today or in future workgroups?***

In response to the Labor Day Fires, Homes for Good is considering buying houses in areas that were burnt down. BPA has looked into how it can help. There are a few options here if the affected homes are in BPA's service territory. One option is the utility program and, for example, EWEB controls how those dollars are spent through their program on units built before 1976. Another option is using funds used through the Low-Income grants that Amy Burke manages, which we believe is the only part affected by the fire in BPA's service area. If anyone has a mobile home park affected by the wildfire and wants to utilize the manufactured home replacement measure, try to work through the utility. Prior to the fire, it was a 6-9 month turn around for replacing a manufactured home, but that time has extended due to strains on supply chain, so plan accordingly.

Washington is considering formalizing a phased approach to projects. Given vulnerable populations, they are not scheduling depending on the housing residents due to COVID-19 safety. Phased work runs through homes that have already received DHP and weatherization installs that may qualify for other upgrades. They have seen a lot of success in programs providing a concierge service that helps low-income and moderate-income homeowners connect the dots on measures they may qualify for.

Regarding BPA's customer loads, it's on average dominated by residential loads. While some customers have seen a massive decline, on average over the entire BPA territory there has not been a massive decline. Some utilities have or will have a stay on shut offs and temporary stays can put a strain on the utilities who have already bought that energy. For the low-income grants, you will have all these dollars to spend come September 30th and BPA has no indication that another budget rollover will be allowed. If it is not spent, it may go back to the BPA general fund. If you think you can't spend that money, we want to see that money go to the low-income community so start working with us early so we can ensure the money stays with you.

Washington State sought guidance from the governor about weatherization and integrated those guidelines. It got back to work in July or August but are at about a fourth of the workload we were this time last year. They are concerned that they won't spend our money by September 30th and will reach out around the 1st of the year. They usually ask for a 3-month heads up if agencies can't spend and they are asking for a 6-month head's up this year.

***Can we use BPA funds to hotel clients while COVID is happening?*** COVID Cares money and LIHEAP can be used to house technicians on the job.

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***Wonderful news!*** Amy Burke got confirmation that yes, BPA grant funds can be used for housing clients (home's occupants) for a reasonable amount of time while work is being completed in their house during Covid. This is covered in a DOE memo outlining Covid-related budget allowances. Grantees must keep records of such charges for review. The cost and duration must be reasonable compared to the cost and duration of the project and not violate the grantee's internal policy regarding travel or housing. We request grantees seek prior approval for these charges since it is a deviation from the budget or project scope, though that is not required. If you have any questions, please email Amy Burke at [aaburke@bpa.gov](mailto:aaburke@bpa.gov) or call her anytime at 503.230.4364.

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A callout was made about a special project that coincided with the beginning of the COVID breakout working on a large homeless shelter in Lane County housing 80% of the houseless population could help address the issue of getting people to work right now.

For the next group, it was requested that BPA include regular updates on the Comfort Ready Home about how it's going when appropriate and there will be an update on what WAP and LIHEAP funding may look like. We will know what the requests will be, the budgets will be finalized in March, but determining what will happen in DC between now and January is where things get choppy. In Washington, there will be an aggressive push for low-income energy efficiency and that can be addressed in the meeting.

### **Wrap Up**

The next meeting will be scheduled on January 19th. Please contact Amy Burke at [aaburke@bpa.gov](mailto:aaburke@bpa.gov) if you have any questions or requests for topics to cover in future workgroups. Go to the "Meeting Materials Archive" on [BPA's Low-Income Energy Efficiency webpage](#) to find this meeting's presentation slides.