

**Low Income Workgroup  
June 15, 2016**

**Tacoma Power and by phone**

**Summary**

The meeting was held at Tacoma Power. Washington Department of Commerce reported on their Weatherization Plus Health program. It is hoped that work undertaken in the home to improve living conditions will have a positive impact on health. The Energy Project reported on woodstove swap out program in Washington State. BPA staff and other workgroup members who led the Low Income Cross-Fit breakout session at the Efficiency Exchange conference in Coeur d'Alene, Idaho, reported out on the main takeaways from the session and discussed the Quick Start Guide, which was officially launched at the conference. The Guide is aimed to help utilities and community action agencies who would like to do more energy efficiency work with low income households. The next meeting was tentatively scheduled for September 15<sup>th</sup> pending no other conflicting regional events.

**Attendees**

**By phone**

Andrew Gibb, Seattle City Light  
John Blomgren, Orcas Power and Light  
Anita Clever, Klickitat PUD  
Paul Rich, Efficiency Services Group  
Matt Deppe, McMinnville Water and Light  
Debbie DePetris, Clark Public Utilities  
Brandy Neff, PNGC  
Eric Miller, Benton REA  
Todd Williams and Lea Hops, Inland Power  
Ed Monson, Benton PUD  
Marcia Lemon, State of Montana  
Ken Robinette, Idaho CAP  
Cheryl Paoli, Idaho Power  
Keith Kueney, CAPO  
Randy Olsen, CA  
Rob Del Mar, OR DOE  
Suzie Azmus, NEEA  
Pat Didion, Milton Freewater  
Cyrus Collins, Columbia PUD  
Joe Hoes, Midstate Electric  
Ryan Davies

Michael Palmer, Inland Power and Light  
Sarah Moore, BPA

**In Person**

Julie Hayes, Milepost Consulting  
Boyd Wilson, BPA  
Shawn Collins, The Energy Project  
Melissa Podezswa, BPA  
Amanda Rains, WA Commerce  
Emily Salzberg, WA Commerce  
Tim Bernthal, WA Commerce  
Charlie Comstock, Alpha  
Steve Jole, HACSA  
Jess Kincaid, BPA  
Todd Blackman, Franklin PUD  
Kevin Watier, SNO PUD  
Charles Schifferdecker, EWEB  
Jeremy Stewart, Tacoma Power  
Mark Percy, Tacoma Power  
Carrie Nelson, BPA  
Melissa Podeszwa, BPA  
Summer Goodwin, BPA, facilitator

## 1. Announcements

- a. The workgroup steering committee has three spaces for utility representatives and three for non-utility. We are currently in need of a replacement for the utility seat the Margaret Ryan (PNGC) has held. Please express your interest to Summer Goodwin.
- b. Franklin PUD-started their first in house low income verification program. They are working together with the CAA on the project. They established a reasonable rate that they pay the CAP for doing the income verification for them. They continue funding the CAP agencies for work that they are doing and use the CAP for qualifying customers who come straight to them.
- c. Sarah Moore, BPA residential sector lead will be on detail for four months. Gary Smith will act for her while she is gone.

2. **Interior and Ambient Air Quality:** Emily Salzberg, Managing Director of Housing and Weatherization, provided an overview of the WA Commerce program to strengthen communities. Commerce hosts the LI Wx program for WA, which is delivered through CAAs, housing authorities, etc. The legislature asked Commerce to expand program to Wx plus health and healthy homes (residence with respiratory challenges). In the state of Washington for the first time, they can approach the work as a comprehensive program. It includes no cost and low cost measures, such as green cleaning, client education, ventilation, mold remediation, and drainage issues. The goals of program were established with stakeholder process and advisory committee. There are established reporting requirements and assessment tools. WSU is partnering with the state for the evaluation. In the first phase, they will document what happened and in the second phase (mid- to long-term) they will partner with Department of Health and Human Services to match their data with the weatherization data. Through the integrated database, they should be able to tell if there is a change in Medicaid or reduction in hospital visits.

3. **Northwest Clean Air Wood Stove Replacement Program:** Shawn Collins, The Energy Project, provided an overview of work with areas within Washington state with inversion issues to improve air quality by helping to fund programs for wood heated homes at all income levels. They are looking to partner with utilities to put in DHP, or EPA- approved wood stoves. In Eastern Whatcom County there is a community curing station so that residents who are going to burn wood for heat can age their wood. Burning cured/aged wood gives off less particulate matter.

4. **Regional Solutions Initiative:** Rob Del Mar, Oregon DEQ provided an overview of a similar program in Southern Oregon. There are two communities facing non-attainment by EPA because of poor air quality due to wood smoke. That air quality issue can impact the region economically. It is hard for new businesses, etc. The Regional Solutions Initiative provides for a local committee to make a recommendation to the legislature for the highest priority projects for funding. In 2015, they received \$1.5 M to do a woodstove change out program. It has been running for a year. So far they have had about 95 projects total. They have replaced with ductless heat pumps or better stoves. The tax credit program can be a challenge for low income customers to leverage.

5. **BPA Work on Non-Energy Benefits:** Phillip Kelsven, BPA, reported out on research on non-energy benefits research that BPA is doing. There are Weatherization and HVAC measures that are on the edge of cost effectiveness. MA has done research. Also the WAP evaluation did some work. There is a research plan on Conduit that lays out a literature review of what is out there currently and methodologies. He is working with the Regional Technical Forum on guidelines language. It may be possible to include this in the RTF's Total Resource Cost ratio. For example, fire prevention, indoor air quality, safety (children) are things that could be included in the non-energy benefits.
6. **Efficiency Exchange, Low Income Cross Fit:** Sarah Moore, BPA, went over what happened at the Exchange conference breakout session on low income energy efficiency (notes attached). It was a "Cross-fit" theme with trainers and tables for each of the four main states represented at the conference (MT, OR, ID, WA). There was a great turn out. Steve Jole and Shawn Collins mentioned that more utilities have become involved in this workgroup as a result of the session. There was a lot of interest in the nuts and bolts on how to get started. Ken Robinette reported that he was at the Idaho table and they talked about how CAPs work with IDEA group which has a contract directly with CAPs. They also talked about the audit process and how we can streamline invoicing. As a result of connections at the conference, there will be a PTCS training to certifying 15 cap agencies in Idaho in August. For utilities in MT, CA, WY, NV, the session was very much an introductory program. They got a basic overview and discussed how they can make the resources go further.
7. **Launch and Request for Feedback on [Quick Start Guide](#):** Carrie Nelson provided an overview of the launch of this new regional tool and led a discussion of how to promote it. Suggestions included a road show and a utility hosted event that presents the quick start guide. The group agreed that there should be away to solicit feedback on the QSG.
8. **BPA Utility Programs Update:** Jess Kincaid briefly reviewed low income measures and provided a briefing on Low E storm windows which will be in the October Implementation Manual.
9. **Wrap-Up and Next steps:** The Next meeting will likely be in mid- or late September in Portland. September 15<sup>th</sup> was suggested. Topics of interest included the renter market and split incentives; CAP and utility budget communication, how to avoid that last minute scramble; and how caps and utilities can work together for outreach to potentially eligible customers. There is interest in soliciting feedback on how the Quick Start Guide is valuable to folks who are new to the workgroup and this work. Utility staff who is interested in serving on the workgroup steering committee should contact Summer Goodwin by July 11<sup>th</sup>.

Meeting notes prepared by Carrie Nelson and Summer Goodwin, BPA.

Attachment: Notes from Low-Income Cross-Fit session at 2016 Efficiency Exchange Conference

## LOW-INCOME CROSS FIT, 2016 ENERGY EFFICIENCY EXCHANGE SESSION

### Major Themes Discovered (there were many other topics discussed)

- Participants would like training on logistics such as: paperwork, documentation, contracts, reporting, SIR versus deemed measures/ measure list
- Participants would like a detailed discussion of funding solutions including other funding sources and financing and how to spread funding around
- Participants would like to look more into mobile home replacement and upstream market efforts
- Participants would like guidance on building and maintaining CAP/ utility relationships
- Participants would like to discuss servicing rental properties

### Summary of Notes Captured on Note Pads

#### Notes by State

##### **Idaho:**

- Share Current Partnerships
- Paperwork submitted by agencies
- Differences in utility programs and Idaho efficiencies
- Who retains documentation?
- How specific is language in contracts
- Understand how the utilities and CAPs work together
- PTCS training in Idaho

##### **MT, CA, WY, NV:**

- Creative / innovative solutions
- Budget considerations vs. Need and how to prioritize
- Value of homes versus the measure cost
- Learning what is offered, others are doing and how to implement
- Financing low and moderate income
- What support stakeholders need from BPA
- Split incentives (tenant/ owner) for LI
- For profit work to develop revenue
- SIR, energy savings calculations – software versus deemed approach
- Options for financing
  - Private capital
  - Loans
  - Rural utility service (USDA)
  - CDBG
  - Tribal funding
  - EGIA loan
  - Question: what problems does financing solve

##### **Oregon:**

- Reaching more clients
- Renters
- Upstream efforts
- Social media – targeting specific demographics
- CAP/ utility communication
- Uses of funding for leveraging
- Manufactured home replacement
- Costs
- Priority list used in WA
- Nonprofit purchase of parks
- BPA exploring a cash for clunkers program
- HSG presentation (not sure what that is)
- Upstream manufacturer efforts

**Washington:**

- Low-income baby steps
- Non-owner low-income
- Low-income WX CAP working with utilities
- Successful reporting tools
- Reach more people
- Learn more about BPA grant program
- Funding projects that exceed BPA funding
- Spending less money
- Easier/ quicker certification
- Financing options
- NGO collaborations
- Regional needs
- Managing DHP projects
- Gap between rebates and cost
- Renters
- Establishing a relationship with a CAP