

**LIEE Workgroup meeting notes  
Franklin PUD, Pasco WA  
July 21, 2015**

**Summary:**

After a recap of the April 21 meeting, we had a round robin of developments. Three steering committee members, Michael Fuerze (State of Washington), Van Ashton (Idaho Falls) and Chuck Eberdt (The Energy Project), have been replaced by Hans Berg (State of Washington, Wid Ritchie (Idaho Falls) and Shawn Collins (The Energy Project). A few participants reported new LIEE activities, due at least in part to the information they had gleaned through this workgroup. Jeremy Stewart (Tacoma) asked others how they are adjusting to the changes in weatherization savings estimates. Donna Kinnaman from Community Action Program of East Central Oregon presented on their program model followed by Courtney Dale (BPA), who presented recent analysis on low income measure installation in manufactured homes. Ed Monson (Benton PUD) and Dawn Senger (City of Richland) presented on their utility's LIEE programs. The final discussion was about the future of the workgroup and the group agreed that the format of the meeting and a quarterly cadence was desirable. There were some ideas for products that could be created to extend the value of the presentations to broader audiences. The group revisited the priority lists from the Post-2011 Review process and the workgroup's first meeting in November 2014 and did some multivoting on the proposed priorities. The topics and votes are included in these notes. The next meeting was tentatively scheduled for October. Since the meeting, the steering committee and BPA have set the next meeting for the morning of November 5 in Portland. The aim will be to hold every other meeting in Portland/away.

**Attendees on the phone:**

| <b>Name</b>     | <b>Affiliation</b>            |
|-----------------|-------------------------------|
| Brent Barclay   | BPA                           |
| Brian Dekiep    | NWPCC Montana                 |
| Brian Fawcett   | Clatskanie PUD                |
| Cheryl Paoli    | Idaho Power                   |
| Debra Peters    | Okanagan                      |
| Hans Berg       | WA Dept. of Commerce          |
| John Thomas     | Midstate Electric             |
| Josh Warner     | BPA                           |
| Kathy Grey      | EWEB                          |
| Kathy L. Moore  | Umatilla Electric             |
| Lisa Brown      | Oregon Coast Community Action |
| Mark Ralston    | BPA                           |
| Megan Stratman  | NRU                           |
| Nancy VanSickle |                               |
| Nathan Heber    | Snohomish PUD                 |
| Paul Rich       | ESG                           |
| Thomas Elzinga  | Consumers Power               |
| Travis Hardy    | Northern Wasco                |
| Van Ashton      | Idaho Falls Power             |
| Wendy Gerlitz   | NWEC                          |
| Wid Ritchie     | Idaho Falls Power             |

**Attendees In Person:**

|                |  |
|----------------|--|
| Alma Velasco   | Franklin PUD                           |
| Anita Clever   | Klickitat PUD                          |
| Boyd Wilson    | BPA                                    |
| Carrie Nelson  | BPA                                    |
| Courtney Dale  | BPA                                    |
| Dale Anderson  | big Ben Electric Coop                  |
| Dawn Senger    | City of Richland                       |
| Donna Kinnaman | CAPECO                                 |
| Ed Monson      | Benton PUD                             |
| Erendira Cruz  | Sustainable Living Center              |
| Eugene Rosolie | NEEA                                   |
| Jeremy Stewart | Tacoma Power                           |
| Keith Kueny    | CAP Oregon                             |
| Lindsey Hobbs  | Inland Power and light                 |
| Margaret Ryan  | PNGC                                   |
| Nancy Philipp  | Benton PUD                             |
| Pat Didion     | Milton-Freewater                       |
| Renee Coelho   | Avista                                 |
| Sarah Moore    | BPA                                    |
| Shawn Collins  | The Energy Project of Washington State |
| Steve Jole     | HACSA (CAP Agency for Lane Co.)        |
| Summer Goodwin | BPA                                    |
| Vic Hubbard    | Franklin PUD                           |
| Todd Williams  | Inland Power and light                 |
| Tom Osborn     | BPA                                    |

**Notes:****Welcome:**

Overview of April 20 meeting – Sarah Moore and Carrie Nelson of BPA gave an overview of the agenda topics and presentations from the April meeting to refresh everyone’s memory. Attendees who missed the boot camp presentation suggested creating materials that provide that information in a different format—easier to find.

New Steering Committee members - BPA announced some changes in the LIEE Workgroup Steering Committee. Van Ashton and Michael Furze will be stepping down. The Steering Committee for this coming period will include: Todd Blackman (Franklin PUD), Margaret Ryan (PNGC), Wid Ritchie (Idaho Falls), Shawn Collins (The Energy Project), Steve Jole (HACSA), and Hans Berg (WA Dept. of Commerce).

**Round Robin Developments/Announcements –**

- Travis Hardy (Northern Wasco PUD) reported that they experienced some dramatic increases in their Low Income projects as a result of their recent efforts. They have completed 25 LI projects this year, up from zero last year. They are collaborating with their CAP agency in The Dalles on Income Verification. Recently they included a bill stuffer and other advertising (including radio PSA) to promote their Low Income program support opportunity, leading to a very good response. Most jobs have been on very high needs

homes and have gone relatively smoothly. Some reasons for success cited were the Utility's willingness to work with the CAP and a CAP that could be responsive as the homeowner applications started to pick up. The homeowner can choose the contractor.

- Margaret Ryan (PNGC)-of her 14 member utilities-6 members have had low income programs. 3 of them had never done the work before. Steve Jole (HACSA) has helped them by going to their offices and sitting down and helping utilities and CAPs collaborate.
- Community EE program has received additional funding-so can continue work in Walla Walla. Focus-hard to reach markets and alternate fuels.
- Jeremy Stewart- Regarding the savings changes in weatherization measures. At Tacoma they had to make program changes. They dropped windows and some attic insulation was restructured. They must not have a heat pump, must show a winter heating curve and 8 kWh per square foot. Jeremy asked what others are doing. Most utilities have not done anything. Inland is considering similar changes.
- Eugene Rosalie-RTF will likely approve low-E storm windows because they are coming out cost effective across all heating zones.

#### Community Action Program of East Central Oregon – Donna Kinnaman

They started with one partner, Milton-Freewater. And compliance to waiting list was also a barrier. The CAP covers a large geographic area of East Central Oregon. They developed partnerships with Umatilla Electric and Hermiston Electric. One barrier to taking on more projects was compliance with all Federal program funding requirements. By working with Boyd Wilson (BPA Energy Efficiency Representative), CAPECO was able to talk through some of the additional capacity opportunities (one auditor, 60 jobs a year) they are now contracting out audits. Oregon CAAs are required to spend funding by a certain date or they get reallocated (relevant to flexibility of language around allocation) lag times were too long. The utilities pay some of the performance payment to help with travel, audits, admin, etc. they do not have to pay prevailing wage.

CAPECO's delivery design:

- Produce a list of eligible households to utility,
- utility can also refer household and be given preference,
- utility then assesses home to determine if they want to fund the project through a drive-by assessment, ensure that the home meets the threshold for electric heat, allows the utility to control the use of their utility funds. This reduces the number of homes to be completed with high repair needs.

Pros and Cons:

- Pros – diversified funding base, created greater opportunity for more homes
- Cons – change of staff at agency and one at utility created some confusion, sharing of reporting requirements was received after first submissions, lag time from final paperwork submission to utility payment was longer than expected. They would like to figure out how to shorten this payment timeline.
- They are currently able to use all of the Low Income measures that BPA has made available.

*Group Discussion:* Is anyone doing Low Income DHPs? Some utilities and CAPs commented that they are starting to do some. Jeremy Stewart of Tacoma commented that they are doing quite a few. Group members suggested that it would be useful to have a presentation/discussion at a future workgroup meeting on DHP for low income *lessons learned, how to keep prices low, and tactics for training occupants on how to use the thermostat, etc.*

#### [Manufactured home, Trends and Changes – Courtney Dale, BPA](#)

Courtney provided an overview of statistics of LIEE measures being completed in manufactured homes as well as single income measures.

- Tacoma thinks there will be more pick up of air sealing with prescriptive air sealing. Now it is easier-no calculation, it is square foot. Anyone who qualifies for air sealing, is almost guaranteed for qualifying on deemed measures. CAPs can pay to have contractors trained for utility.
- Todd Blackman (Franklin PUD)-program design has prescriptive air sealing in almost every measure of weatherization, included inside these measures. CAAs have to blower door every house. There was a discussion about windows-and how both CAA and BPA programs work. Duct sealing is less cost effective now because of prevailing wage, asbestos abatement, etc. Tacoma is doing LIEE ductless heat pumps (DHPs). Steve Jole (HACSA) is using utility funds for low income weatherization. Cowlitz PUD is looking into adding them to the LIEE program. Interested in looking at examples of DHP applications. Good example for leveraging funding with CAAs.

[Presentation by Ed Monson, Benton PUD](#) – Benton does extra oversight for low income. They try to inspect most projects. There are variables for how states interpret the regulations. DOE is the only grant funding in Oregon that goes to 200% of poverty level. Hans Berg (Washington Commerce)-It has been changed so that it is incorporated, but it is not the only consideration. There is a “high energy burden” aspect.

Presentation (no slides) by Dawn Senger, City of Richland. They are launching a new LIEE program for the first time ever. They are going to do their own income verification. They are a municipality and are able to work with another part of the City of Richland to access Community Development Block Grant funds from HUD. They will choose what money can move the fastest for specific LIEE things.

Final Discussion: Has the group set out what we wanted to accomplish? We went through list of workgroup priorities and posed the questions: What would your top priority for this workgroup be? What do you think could help increase acquisition of low income energy efficiency? Is there something that this workgroup could do? Someone else could do?

- Reporting was talked about-The Energy Project will make note carry on that request if needed.
- Donna Kinnaman (CAPECO) talked about the difference in lag time from when jobs are completed to when they are reimbursed and trying to better understand it.
  - o Eugene-some utilities won't pay the CAP until they are paid by BPA.
- What do we want to share best practices for? Could payment and funding cycles be part of this?
- Moderate/near low income.
  - o The gap in Washington from 125 percent to 200 percent of poverty.
  - o Sarah Moore (BPA)-We can serve them now. It's just a higher incentive. It is utility money.
  - o The RTF was looking at this-moderate income. The RTF was looking at rural areas; some measures are just getting started-where in I-5 corridor they are done. The 7<sup>th</sup> power plan is discussing moderate income. What is low income in our region? If the conversation is not happening here, where would it?
  - o Margaret Ryan (PNGC)-7<sup>th</sup> power plan. The RTF small rural residential sub workgroup is working on this subject. That is just talking about measures. We would like to come up with measures that fall into this category. Community Development Block Grant (CDBG) goes by median income. Energy Trust of Oregon has a program that covers the low income (moderate income) that isn't reached.
  - o Todd Blackman (Franklin PUD)-it's the great untapped sector-that are rate payers.
  - o Sarah Moore (BPA)-This group is essentially a lost opportunity.

- Idea: Low income clearing house-of work to be done. Matchmaking service. Bundling services in remote areas. You could still bundle moderate and low income. Could even bring down prices. Can a utility focus in a certain area at one time for weatherization?
- Hans Berg (Washington Commerce)-are there concrete examples of not spending funding. Does this happen? What are barriers?

### **Feedback with tally of votes or other action noted**

- **Workgroup format and cadence** - Quarterly meetings good
- **Future Topics for Discussion/ Barriers to Remove**
  - o Could show income verification process - planned
  - o Cash flow issues, is delay in payment to CAP due to missing reporting requirements 8
  - o What is the definition of low-income? Currently 200% for BPA LI measures. We could broaden focus to high income households 15
  - o Highlighting what is working well between CAPs and utilities 21
  - o Understanding air sealing and how to claim through BPA 7
  - o Encourage contractors to serve rural areas, help them bundle (idea: Bundling services so that one contractor can go out and do a bunch of projects, something like Match.com or low tech solution like during a certain time period in a certain area) 12
  - o CAPs have fewer of their own crews these days - will get data from market assessment
  - o not enough funding to meet the need, explore alternative funding 16 –need to hear more about what was meant
  - o LIEE measures are expensive, controlling costs 21 – need to hear more about what was meant at the next meeting
- **Outreach**
  - o Regional coordinators meeting boot camp recap 11
  - o Efficiency Exchange conference – at least one session will be proposed
  - o Explaining to utilities, what’s in it for them? Directly or indirectly via media outlets 7
  - o Could record and post boot camp - planned
- **Data needs**
- Who are the CAPs working with which utilities? – being captured in market assessment
- Where are CAP funds being left on the table? – no votes

### **Next Meeting**

October 28 in Chelan was the **tentative** date and location for the next meeting. [Since the meeting, the steering committee and BPA have set a meeting date of the morning of November 5 in Portland. The plan will be to hold every other meeting in Portland and the other meetings away.]