

WORKSHOP #2: INCOME ELIGIBLE SERVICES

▶ November 10, 2020

IES OVERVIEW

- ▶ **IES serves households that have income levels that are at or below 60% of the State Median Income.**
- ▶ **Buildings served include single-family and multifamily buildings, with units occupied by homeowners or renters.**
- ▶ **Program services are designed to comprehensively address all energy end uses:**
 - Mechanical and lighting systems, weatherization of the building shell, and appliances.
- ▶ **PAs are responsible for IES energy efficiency program delivery.**
 - By statute, the Low-Income Energy Affordability Network (LEAN) is the Lead Vendor that provides IES under contract to the PAs.
 - LEAN is comprised of the full contingent of Community Action Programs across the State.

BACKGROUND/CURRENT STATUS

- ▶ **COVID-19 expected to increase the number of low-income households in MA.**
 - Impacts likely to be borne more by groups historically underserved by efficiency programs, including people of color.
- ▶ **PAs have historically met or exceeded statutory requirement IES spending, but differences in service exist across service providers and amongst specific groups of customers.**
- ▶ **Opportunities for increased participation and savings include:**
 - Deeper savings measures that can help replacing lighting savings
 - Heat pumps, WiFi thermostats, insulation and air sealing of masonry buildings
 - Multifamily building with naturally occurring affordable housing (NOAH) and those being rehabilitated or recapitalized
- ▶ **Need to ensure reporting supports program assessment and improvement**

WORKSHOP TOPICS

► **Five topics will be addressed in the workshop to focus on ways in which IES can continue to lead and innovate in 2022-2024:**

1. Ensuring equitable service
2. Measures: increasing heat pump installations and introducing new measures
3. Strengthening multifamily pipelines and protocols
4. Ensuring adequate budgets
5. Improving data and systems for program assessment and improvement

IES RECOMMENDATIONS: ENSURING EQUITABLE SERVICE

- ▶ **Determine if there are differences in service levels by Community Action Program (CAP) territory, PA territory, or PA program (gas or electric) that are not warranted by differences in proportions of low-income households. Develop and implement strategies to correct unwarranted service differences.**
- ▶ **Expand efforts to enroll customers newly eligible for IES services as a result of COVID.**
- ▶ **Develop complete detailed mapping of customer journey for those who may be isolated by limited English proficiency (LEP), from first point(s) of contact, through intake, application, assessment, installation, and quality assurance. Utilize mapping to develop and implement a strategy to improve service to LEP customers.**

IES RECOMMENDATIONS: INCREASING HEAT PUMP INSTALLATIONS AND INTRODUCING NEW MEASURES

- ▶ **Increase heat pump installations, including by identifying and prioritizing cost-effective applications, developing protocols to standardize decision-making, and identifying and addressing barriers to installation.**
- ▶ **Increase opportunities for participation in active demand reduction, including developing protocols for determining appropriate households for installation of WiFi thermostats for energy efficiency and demand reduction. Include follow-up, when necessary to provide customer support.**
- ▶ **Test and deploy new technologies, such as interior foam for masonry buildings, in order to increase energy and demand savings.**

IES RECOMMENDATIONS: STRENGTHENING MULTIFAMILY PIPELINES AND PROTOCOLS

- ▶ **Develop and implement a strategy for increasing and improving service to multifamily buildings, including naturally occurring affordable housing. This should include:**
 - Working with the MA Dept. of Housing and Community Development, US Dept. of Housing and Urban Development, and public housing authorities to identify and reach out to owners and managers of small multifamily buildings that are part of the certificate-based Section 8 program
 - Utilizing PA account data and Multifamily Census to identify multifamily buildings
- ▶ **Develop and implement strategies to provide more flexibility for multifamily building undergoing scheduled rehabilitation, renovation, or refinancing, to enable installation of deeper energy-savings measures.**

IES RECOMMENDATION: ENSURING ADEQUATE BUDGETS

- ▶ **Income eligible budgets should increase to reflect expected increases in the number of low-income households due to COVID. IES budgets should also increase to reflect revised measure mixes and improved protocols. The Plan should incentivize additional spending on income eligible programs.**

IES RECOMMENDATIONS: IMPROVING DATA AND SYSTEMS FOR PROGRAM ASSESSMENT AND IMPROVEMENT

- ▶ **Strengthen regular reporting in order to identify areas of improvement and resources needed to support comprehensive and equitable service to all submarkets. Reporting should provide insight into specific program activities and buildings served, as well as identify where program designs are working well or need modification. Reporting to the EEAC should allow differentiation of program activities by more granular parameters including:**
 - PA and CAP territory
 - Program (gas, electric)
 - Service type (Appliance Management Program, weatherization, heating system)
 - Building size (number of units)
 - Resident status (owner or renter)

IES RECOMMENDATIONS: IMPROVING DATA AND SYSTEMS FOR PROGRAM ASSESSMENT AND IMPROVEMENT

- ▶ **Develop and implement statewide computerized audit that can provide regular and consistent information to support identification of best practices and needed continuous improvement as well as reporting to the Council and providing data for EM&V.**

IES RECOMMENDATIONS: OTHER

- ▶ **Ensure that best-practice models for participant recruitment and interaction are being followed uniformly to increase participation. This includes use of a single point of contact for multifamily building owners and the mixed-income protocols.**
- ▶ **Realize program savings from investment in benchmarking, providing building owners and managers who have participated with information on building energy performance over time.**

THANK YOU

Questions

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