

Low Income Recruitment Report – March 2021



This recruitment report highlights the monthly activities the Low-Income Facilitator (LIF) has conducted for the month of March, and a snapshot of current results from the LIF and Project Managers (PMs).

Summary:

This report will become quarterly, with monthly updates of only the recruitment numbers from this point on.

The recruitment of low-income participants continues to be slow and steady in the face of COVID-19 barriers. The Program Administration (PA) team has worked with Project Managers to boost recruitment and find creative solutions to meeting the requirements of the program. This effort may lead to significant intake spikes in the next couple of months. Paired with delays to every solar project from the original timelines, we are relatively on track to meet the low-income goals.

The PA designed the low-income program to have minimal risk to subscribers by ensuring that monthly credits will exceed monthly subscription fees. However, the Program does not operate in a vacuum and when combined with current utility billing systems, partial and skipped payments can lead to arrears to the solar program. As low-income customers are much more likely to struggle to keep up with bills, this issue, left unresolved, will have serious impacts on the program. This has also significantly slowed recruitment efforts. See “Utility Billing Structure” under Program Development for more information.

Additionally, we collect demographic information from low-income participants. Each month we will highlight different statistics about our participants, with a full report at the end of the program year.

Recruitment Results

Low-Income Facilitator Recruitment

The Low-Income Facilitator (LIF) recruits low-income customers for Project Managers (PMs) that have asked for assistance. The goal number of participants is an estimate for each utility territory that is based on the recruitment needs of each project. *This chart includes those projects currently open to recruitment/assignment.* Numbers will

change frequently based on subscription size adjustments, added/cancelled projects, recruitment delays, and extensions.

Current Participants: LI customers who have completed intake, recruited by both LIF and PMs and are still participating in the program.

Recruited: Customers recruited by the LIF that have completed intake and are still participating in the program. After 90 days of no response, participants are removed from the list.

Assigned: LIF-recruited customers that have been connected with a Project Manager. CEP is currently assigning participants from the waitlist.

Goal: Total number of participants LIF is responsible for recruiting across projects actively recruiting/ready for assignment in the reporting month, and the percentage completed toward that goal.

Numbers are cumulative.

Current LIF Participant Management					
	Current Participants 3/31/2021	Recruited 3/31/2021	Assigned 3/31/2021	Goal and % completed	
PGE	187	110	37	263	42%
PPL	36	35	0	40	88%
IDP	1	1	0	0	

Project Manager Recruitment

Many Project Managers are also conducting recruitment for their projects. This table represents all projects that have been pre-certified and are conducting recruitment this month. Goals will change if projects are delayed and anticipated certification dates are updated. Numbers are cumulative.

Leads: Potential participants sent to the LIF for intake and assignment.

Assigned: PM-generated leads are assigned to their project once intake is completed. This is counted toward the goal.

Goal: The total number of LI participants the PM’s need to reach their share of 10% of their project, and their current percentage completed.

Current PM Recruitment				
	Leads* 3/31/2021	Assigned 3/31/2021	Goal and % completed	
PGE	92	77	1195	8%
PPL	3	1	48	6%
IDP	0	0	0	

*PMs provide leads to the LIF for intake. People may change their mind before or during intake, or may be unreachable, so leads will be higher than the “assigned” number. Once customers have completed intake, they are assigned to the project.

Recruitment Projections 2021

Recruitment goals for all projects, including those doing active recruitment and those that have been pre-certified but are not yet ready for recruitment through 2021. LIF recruitment goals dropped this month as in the previous month they included projects for 2022.

Total Recruitment Goals		
	LIF Recruitment	PM Recruitment
PGE	908	1195
PPL	405	133
IDP	60	76

Highlighted outreach activities for March

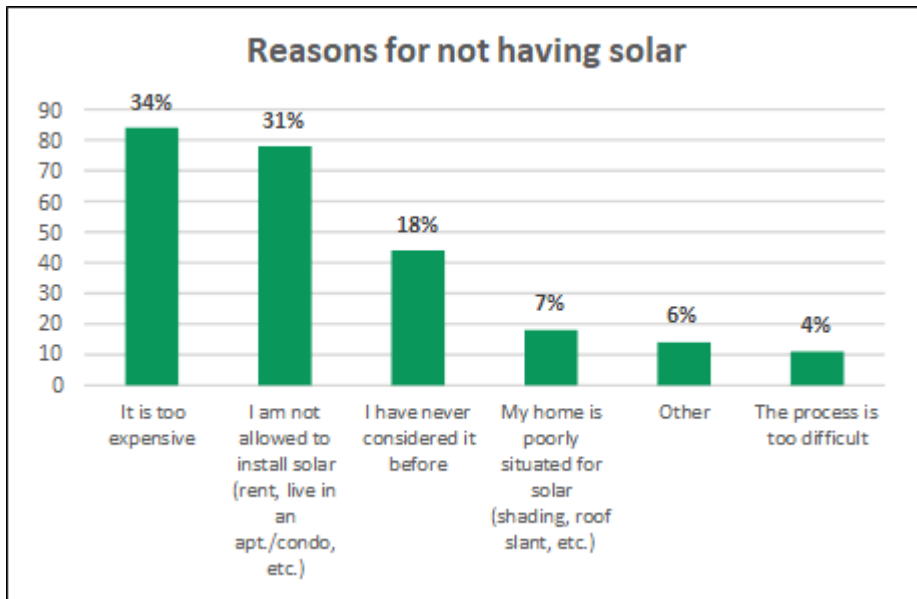
- Held 3 meetings with CBOs
- 2 educational workshops provided; 2 attended
- Coordinating with Project Managers
 - Low-income housing – participants with master meters

Equity Snapshot!

CEP collects demographic information during intake, to ensure the Program is made available to those who have been left behind by traditional solar.

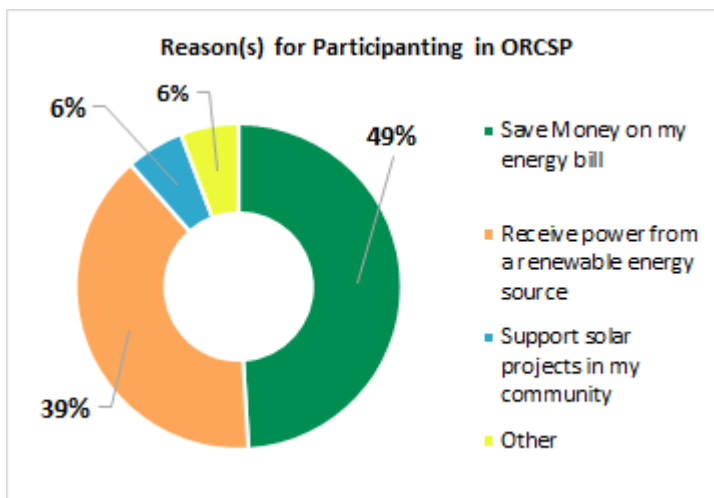
Reasons for not having solar before community solar

34% of subscribers state that rooftop solar is too expensive, followed by 31% of subscribers who say they are not allowed to install rooftop solar.



Reason(s) for participating in Community Solar

49% of subscribers say they want to save money on their electricity costs through this program, and 39% want to receive power from a renewable source.



Program Development

In Progress

- Exploring ways to solve arrears issues for partial payments
- Assigning existing LI waitlist to available projects
- Exploring the program's possible impact on existing energy assistance programs
- Drafting a public-friendly annual report
- Exploring alternative billing methods

Updates

Language Accessibility

While language accessibility is not only a barrier to low-income participants, currently the majority of multi-lingual recruitment is occurring through the LI program.

Reducing language barriers is important not only for outreach and ensuring those paying into the system have equal opportunity to take advantage of the program, but also for consumer protection, an issue highlighted by the possibility of arrears to PMs.

To make the program as accessible as possible, the Program Administration team has translated all program educational documents (currently including English, Spanish, Russian, and Vietnamese) and intake procedures, made available online or via telephone with live interpretation. Contract templates, FAQ's, and marketing materials are also translated by the PA team.

Project Managers are responsible for communication about their specific project with their participants. The PA team reached out to PMs to assess their current multi-language capabilities. The PA team has provided resources on live interpretation services for phone calls in multiple languages and we have received one response. We recognize that some financial institutions do not accept translated documentation. However, PMs are expected to provide a completed version of the contract provided by the PA team in the signer's preferred language.

The LIF encourages all PMs to provide language assistance services to non-English speaking participants. Additionally, the LIF will assign non-English speaking leads to PMs that offer language assistance services.

Update on Activity

The LIF is currently working with one PM who has offered to work with non-English speaking participants. The PM has worked with their financial institutions to accept bi-

lingual contracts, and the LIF is working with them to ensure seamless transitions from intake through the end of the process with the highest level of customer service.

Utility Billing Structure

With the current billing structure of utilities, partial payments can lead to arrears to PMs, despite the credit being higher than the monthly fee for all LI subscribers. This issue further slows down recruitment as the program is less desirable, and increases recruitment needs as it will increase turnover. The PA team and PUC are working with utilities to find solutions to this issue, which CEP anticipates will impact 25-35% of individual LI subscribers. CEP has also modified recruitment plans to focus on LI customers who can keep up with their electricity bills but make sacrifices to do so.

(For more on how arrearages occur, visit <https://www.oregoncsp.org/p/lowincome> and click on “Partial Payment Information” for a PDF)

Impact on LI Recruitment

Community Based Organizations (CBOs) who serve vulnerable communities are reluctant to support the program when partial payments will lead to arrearages for 25-35% of their constituents. Thus, we are left with an ethical imperative not to do outreach to our greatest potential partners – agencies that distribute energy assistance and food benefits, DHS (Department of Human Services), WIC (Women Infants and Children), TANF (Temporary Assistance for Needy Families), and more. These programs reach thousands of LI households each year through their programs and are now not appropriate audiences to do outreach to because the risk of participants falling into arrears is too high. The outreach market currently consists of those who meet the current income guidelines who can pay their bills each month but would like to receive discounts. This is a narrow market that significantly limits recruitment.

Energy Assistance Research

The PA team is currently working with utilities to understand if and how energy assistance is impacted by community solar subscriptions.

Oregon Housing and Community Services has confirmed that bill utility discounts will not be counted as income. The PA team is waiting for confirmation of the same from HUD housing.

COVID-19 Impacts:

Frontline communities face a large and disproportionate impact by COVID in job loss, business loss, contagion contraction, and death. Additionally, millions of unemployed

have entered the system at one time, overwhelming agencies. While the situation is still very dire for many, we anticipate that with the roll-out of vaccinations to the public, that this summer may see more in-person meeting capabilities, and easier outreach.

- CEP is not utilizing in-person outreach methods until it is safe to have gatherings again. CEP normally participates in 20+ community events and provides over 160 skill-building workshops to LI customers annually.
- *The Digital Divide* some groups of individuals do not have access to the internet at all, let alone services that allow them to live-stream content like webinars. Community centers and libraries are currently closed. This divide applies largely to low-income communities, as well as people of color and seniors, all of whom are target demographics for this program. Online outreach methods are far less effective.
- *Low-Income Partner Engagement* has improved as CBO's have learned to cope with COVID, but they are still overwhelmed with the rising needs of those they serve with limited resources. Additionally, some groups are taking on other COVID-19 related tasks such as vaccine campaigns.