

Low Income Recruitment Report –

May 2021

The monthly recruitment report highlights cumulative recruitment statistics for the Low-Income Facilitator (LIF) and Project Managers (PMs) through the month of May 2021, along with corresponding goals and percent completed. Moving forward, more in-depth program updates, such as outreach activities, program developments, and the equity snapshot, will be provided on a quarterly basis in lieu of the monthly reports.

Goals are based on marketing plans created by PMs, which are hypothetical division of labor for recruitment. Some PMs have been able to exceed their original recruitment goals thanks to partnerships with multi-family housing, and others have struggled to meet them. The recruitment goals have shifted based on these results.

Low-Income Facilitator Recruitment Statistics

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

Master Meters: Multifamily Housing Providers with master meters who will pass on financial benefits to those living in the building. Currently the number of participants is symbolic (based on marketing plans) and not literal. This will change in the near future to reflect the actual number of customers benefiting from the program.

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.

Percent Completed: Combined recruited individuals and assigned master meters divided by the goal within the given utility territory

All numbers are cumulative with a start date of March 1, 2020.

Current LIF Participant Management						
	Current Participants 5/31/2021	Recruited (Individuals) 5/31/2021	Assigned (Individuals) 5/31/2021	Assigned (Master Meters) 5/31/2021	Goal	% Completed
PGE	195	123	55	255	310	122%
PPL	42	38	0	75	75	151%
IDP	1	1	0	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. Assigned does not mean that the participant has signed a contract with their assigned project. If a participant does not sign a contract within 30 days of intake, they are removed from the active participant list

Master Meters: Multifamily Housing Providers with master meters who will pass on financial benefits to those living in the building. Currently the number of participants is symbolic (based on marketing plans) and not literal. This will change in the near future to reflect the actual number of customers benefiting from the program.

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.

Percent Completed: Combined assigned individuals and assigned master meter divided by the goal within the given utility territory.

Current PM Recruitment					
	Leads 5/31/2021	Assigned (Individuals) 5/31/2021	Assigned (Master Meter) 5/31/2021	Goal	% Completed
PGE	99	72	271	1148	30%
PPL	4	4	83	88	99%
IDP	0	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 and PM recruitment goals may change month to month if and/or when project timelines get pushed out to 2022.

Total Recruitment Goals		
	LIF Recruitment	PM Recruitment
PGE	908	1195
PPL	571	133
IDP	60	76