

Low Income Recruitment Report –

July 2021

This recruitment report highlights the monthly activities the Low-Income Facilitator (LIF) has conducted through July 2021, and a snapshot of current recruitment results from the LIF and Project Managers (PMs). Once per quarter more in-depth program updates, such as outreach activities, program developments, and the equity snapshot are provided, as seen below.

Summary:

Currently, the program has more LI participants than we have slots to fill for projects that are actively recruiting participants, meaning we currently have a waitlist for subscribers. This is in large part due to PMs working with housing groups who have master meters, filling in much of the available LI capacity.

The LIF expects LI recruitment for individuals to increase, especially in PGE territory as new progress has been made to resolve the issues around the billing hierarchy. This will make outreach significantly easier as it eliminates almost all risk for LI subscribers to participate in the program, and will be much more desirable for partners who work with those with extremely low incomes.

Additionally, COVID-19 restrictions continue to lift, though many partners are doing so slowly and cautiously.

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. Currently, all projects with LI recruitment availability have been filled.

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 from March 1, 2020.

Current LIF Participant Management						
	Current Participants 7/31/2021	Recruited (Individuals) 7/31/2021	Assigned (Individuals) 7/31/2021	Assigned (Master Meters) 7/31/2021	Goal	% Completed

PGE	239	127	63	255	263	145%
PPL	49	41	0	75	75	155%
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 have informed the LIF that they are currently recruiting. Goals will change if projects are delayed and anticipated certification dates are updated. Numbers are cumulative.

Leads: Potential participants the PM has recruited and 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. See “Program Development” for more.

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	104	73	271	1195	29%
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

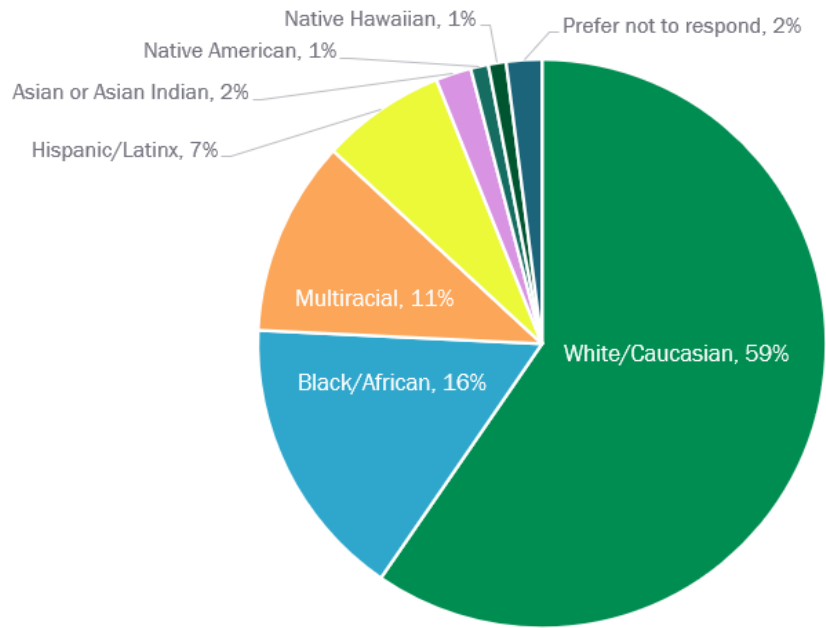
Recruitment goals for all projects, including those doing active recruitment and those that have been pre-certified but are not yet ready for recruitment through 2021. LIF and PM recruitment goals may change month to month if and/or when project timelines get pushed out to 2022.

Total Recruitment Goals		
	LIF Recruitment	PM Recruitment
PGE	849	1,207
PPL	632	207
IDP	60	76

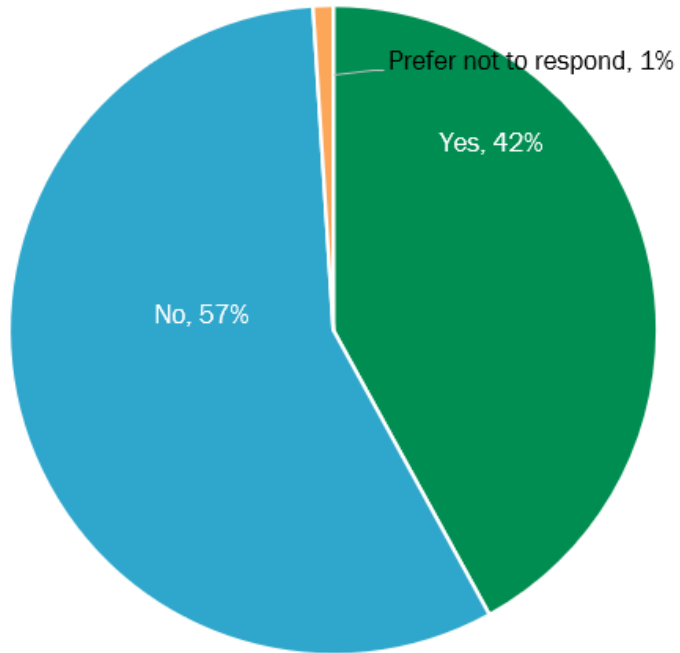
Equity Snapshot

CEP collects demographic information during intake, to ensure the Program is made available to those who have been left behind by traditional solar. Once per quarter we highlight two statistics to share here. These statistics are for LI subscribers only, and are cumulative.

What is your Race/Ethnicity?



Does anyone in your household have a disability?



Program Development

In Progress

- Exploring ways to solve arrears issues for partial payments
- Recommendations for Tier 2
- Drafting a public-facing annual report

Updates

Language Services

The LIF produced a guide for PMs to work with participants across multiple languages, and was placed in the PM resource guide [here](#). It provides step-by-step instructions on where to find live interpretation services, general costs, and how to utilize the services effectively to work with participants who are most comfortable speaking languages other than English. We already have multiple participants in the program who are not native English speakers.

Master-Meters

While this program provides many more people with the opportunity to go solar, one group that is left out are those who rent in master-metered buildings.

For this reason we have allowed PMs to work with LI housing partners with master meters to count towards the low-income allocation, so long as certain requirements are met.

- Residents within the building receive direct financial incentives (such as a check) equivalent to 75% or more of the utility savings. This gives them similar benefits to if they signed up for the program themselves.
- Residents must also be educated about community solar, so that they understand the program they're taking part in and understand that if they move, they are able to sign up for the program themselves as individuals.
- The housing facility must have 80% or more of residents that meet the community solar income guidelines

The LIF is available to work with housing providers and PMs to provide education, gather demographic information from participants, and to work out any concerns the providers may have.

One single housing partner can fill the LI capacity for multiple projects, causing a significant surge in LI recruitment goals being met, as we saw last month. A significant driver to the decision to approve these projects was due to the risks associated with partial payments from the billing hierarchy. This allowed housing providers to take on the risk instead of customers.

While working with multifamily housing in this way provides new opportunities for access, the LIF does not recommend this method become the majority of the LI carve-out.

- It sacrifices participant mobility.
- The amount a participant receives directly is reduced by up to 25%.

- Many customers qualify for LI housing but cannot get in, and they should have access to community solar.
- There is a substantial disconnect between the individual customers and the program, and continued education to customers is not easily enforceable.

Utility Billing Structure

New! The PA team and PUC have worked out solutions with Portland General Electric and Pacific Power to solve this issue for low-income participants. The plan is for these new solutions to be in place by the end of 2021. This issue is not applicable to Idaho Power at this time.

This will have a significant positive impact on outreach, enabling the LIF to include partners that work with extremely low-income communities, and will be able to reconnect with potential participants who withdrew their consideration for the program upon learning about this issue. These solutions will also greatly reduce turnover within the program, increase the efficiency of the intake process, and create a more positive long-term subscriber experience.

COVID-19 Impacts:

Despite the state opening up, many partners remain cautious and operations serving frontline communities have not yet returned to normal. We also anticipate that the Delta Variant can cause both new shutdowns and slow down a return to normal community engagement.

- CEP is still not utilizing in-person outreach methods. This will also depend on if partners choose to have events. 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. 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.
- *Low-Income Partner Engagement* is slowly improving. With utilities solving issues with the billing systems, we will be able to recommend this program to those who are in arrears, and can have discounts to help reduce those debts. This will be desirable to many partners many of whom have clients with COVID-related utility arrears.