

Low Income Recruitment Report – August 2021

This recruitment report highlights the monthly activities the Low-Income Facilitator (LIF) has conducted through August 2021, and a snapshot of current recruitment results from the LIF and Project Managers (PMs).

Summary:

This month the LIF moved the majority of the existing waitlist into the remaining open projects.

In this report, the focus is on the number of participants in the program rather than subscribed solar capacity when measuring the percentage toward the goal. This month, the PM recruitment goals were altered due to updated marketing plans and due to participants having larger subscriptions than anticipated, so fewer participants were needed to fill the 10% allocations.

In August, Portland General Electric promoted the Oregon Community Solar Program through customer utility bills. In September they will send an additional 32,000+ letters to customers that have received energy assistance recently in order to promote the LI program.

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. While the LIF did not recruit any of the Master Meter participants, these projects also filled the LIF original obligation.

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 8/31/2021	Recruited (Individuals) 8/31/2021	Assigned (Individuals) 8/31/2021	Assigned (Master Meters) 8/31/2021	Goal	% Completed
PGE	247	120	87	255	375	106%
PPL	53	42	0	75	75	156%
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 8/31/2021	Assigned (Individuals) 8/31/2021	Assigned (Master Meter) 8/31/2021	Goal	% Completed
PGE	107	75	271	*613	56%
PPL	4	4	83	88	99%
IDP	0	0	0	0	

*This number saw a significant change due to a combination of updated marketing plans and average subscriptions being larger than original projections.

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			
	Total LI Participants	PM Recruitment	LIF Recruitment
PGE	1612	672	940
PPL	538	133	405
IDP	0	0	0
Total	2150	805	1345