

# Low Income Recruitment Report –

## September 2021

This recruitment report highlights the monthly activities the Low-Income Facilitator (LIF) has conducted through September 2021, including 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 is very strong with our Low Income (LI) recruitment goals. As of the end of September 2021, there is a waitlist of over 250 participants, with more projects ready to take on assignment soon. Resolution within the program means opportunities for strong, efficient outreach, and we anticipate that the next tier of the program provides more reasons for optimism.

80% of the PGE LI participants for in the program are in Master Meter housing, and are therefore not individually subscribed (see the [August report](#) for more information). However the majority of the remaining capacity within Tier 1 will be LIF recruitment, which will be approximately 590 subscribers.

### 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 assignment availability have been filled. This will not include Master Meter projects.

**Current Participants:** Individual LI customers who have completed intake, recruited by both LIF and PMs and are still participating in the program. After 90 days of no response, participants are removed from the list.

**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 signed contracts with a Project Manager.

**Waitlist:** These are LI individuals who have completed intake but have yet to be assigned to a project.

**Goal:** Total estimated number of participants, based on submitted marketing plans, that the 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<br>9/30/2021 | Recruited<br>(Individuals)<br>9/30/2021 | Assigned<br>(Individuals)<br>9/30/2021 | Waitlist | Goal | % Completed |
| PGE                                | 396                               | 313                                     | 93                                     | 211      | 93   | 336%        |
| PPL                                | 52                                | 44                                      | 0                                      | 49       | 0    | N/A         |
| IDP                                | 1                                 | 1                                       | 0                                      | 1        | N/A  |             |

## 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 Low Income Facilitator (LIF) that they are currently recruiting. Goals will change if projects are delayed and anticipated certification dates are updated. Numbers are cumulative.

Currently all Project Managers ready for LI enrollment have reached their goals.

**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:** Low-Income Multifamily Housing Providers with master meters who will pass on financial benefits to those living in the building. These numbers are updated once meters are approved by the LIF.

**Goal:** The total number of LI participants the PM's need to reach their share of 10% of their project.

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

| Current PM Recruitment |                    |  |   |      |             |
|------------------------|--------------------|--|---|------|-------------|
|                        | Leads<br>9/30/2021 | Assigned<br>(Individuals)<br>9/30/2021 | Assigned<br>(Master Meter)<br>9/30/2021 | Goal | % Completed |
| PGE                    | 107                | 75                                     | 692                                     | 767  | 100%        |
| PPL                    | 4                  | 4                                      | 296                                     | 300  | 100%        |
| IDP                    | 0                  | 0                                      | 0                                       | 0    |             |

## Recruitment Projections For Tier 1

Recruitment goals for all projects, including those doing active recruitment and those that have been pre-certified for Tier 1 but are not yet ready for LI assignment. Numbers are updated as projects are filled to reflect results as well as projections.

| Total Recruitment Goals |                          |                |                 |
|-------------------------|--------------------------|----------------|-----------------|
|                         | Total LI<br>Participants | PM Recruitment | LIF Recruitment |
| PGE                     | 1890                     | 1207           | 683             |
| PPL                     | 746                      | 351            | 485             |
| IDP                     | 136                      | 76             | 60              |

|              |             |             |             |
|--------------|-------------|-------------|-------------|
| <b>Total</b> | <b>2772</b> | <b>1634</b> | <b>1228</b> |
|--------------|-------------|-------------|-------------|

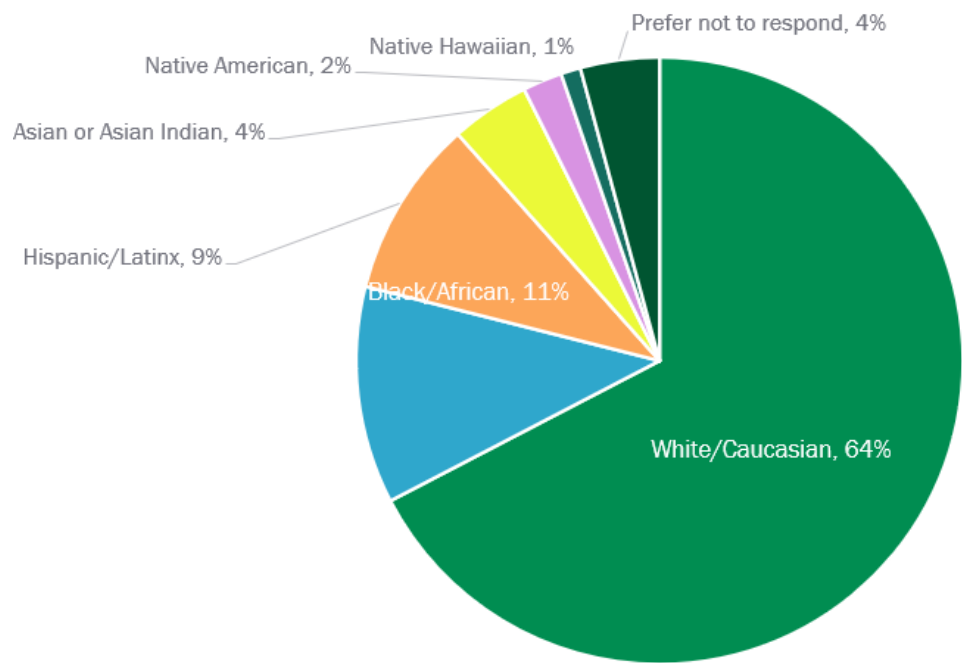
### *Equity Snapshot*

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 individual LI subscribers only, not including master metered participants, and are cumulative. These statistics help CEP to understand who is being served, and how to alter our outreach tactics in order to meet LI customers in the most equitable way possible. CEP will conduct an equity analysis of LI participant demographics later this year.

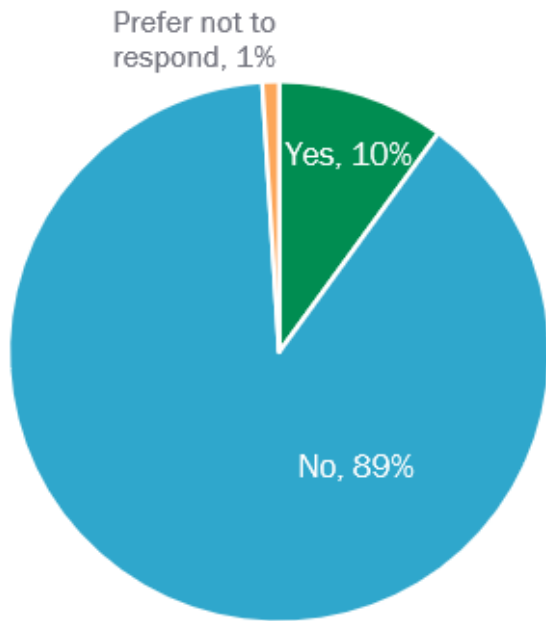
#### Demographic highlights:

- About 33% of our participants identify as a person of color.
- 10% of our participants are, or live with, a veteran.
- 50% of our participants identify as having someone with a disability in their household.

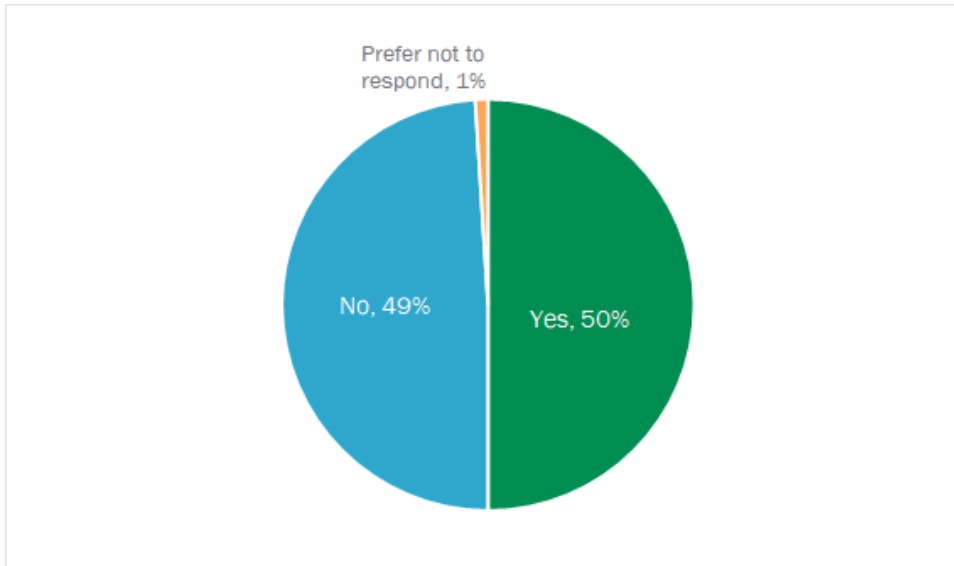
What is your Race/Ethnicity?



Is anyone in your home a veteran?



Does anyone in your household have a disability?



## Program Development and Highlights

### Outreach

With the resolution of the billing hierarchy among utilities currently recruiting CEP worked with PGE to send a large mailing to over 32,000 PGE customers at the beginning of September. To date, this letter has resulted in over 450 households calling to learn more about the program. Almost 200 of those households have completed intake and joined our waitlist by the end of September.

The annual bill insert that went out to all PGE customers in August resulted in intake appointments for five low-income households. This highlights the importance of targeted low-income outreach in reaching low-income subscribers versus general outreach. -s.



CEP has been working with local leaders to do outreach to community-based organizations (CBO) that serve frontline communities. In October there will be two long, interactive workshops with CBO's, focusing on the carve-out, funding opportunities to develop projects, conduct outreach to their communities, and partner with Project Managers.

We will also provide our *Saving with Solar* presentation to their staff and clients in addition to providing regularly scheduled public sessions. The short, 30-minute presentation covers what community solar is, how the Oregon Community Solar Program works, and the specific protections put in place for low-income subscribers. At the end of the workshop, participants can ask any questions they have about the program and qualified households can complete intake immediately or schedule a one-on-one intake appointment with our coordinator. Coordinating with community-based organizations to provide these presentations allow us to reach groups we may be unable to reach otherwise, while increasing accessibility with interpretation, cultural competency, and digital divide barriers.

CEP continues to work with Project Managers to provide effective, consistent outreach tactics to reach LI customers. CEP will offer a variety of support mechanisms, from co-presenting with CBO partners to advice on effective grassroots outreach, messaging, and more.

## **Tier 2 LI Discount**

This month the PUC approved a 2% escalator tied to a 40% subscription discount for LI subscribers. This will increase utility bill discounts significantly, and is in line with what expert stakeholders and the LIF recommended. This will make it significantly easier for the LIF to fill LI goals for the program, more closely reflects the income gap between LI and general market participants, and will have a significant impact on the lives of LI customers who participate. The LIF anticipates a decrease in turnover at every stage of the process from intake to contract signing.

## **Utility Billing Structure**

The PA team and PUC have worked out solutions with Portland General Electric and Pacific Power to solve this issue for low-income participants, it is now resolved. This issue is not yet applicable to Idaho Power customers.

Not only is this a positive development for LI subscribers and greatly improves options for outreach, but this solution may please investors in solar projects, and reduce the need for credit checks. See the [PM Billing Guide](#) for more.

### **COVID-19 Impacts:**

Despite the state opening up, many partners remain cautious in the rise of the Delta Variant and operations serving frontline communities have not yet returned to normal.

- CEP is still not utilizing in-person outreach methods as partners are not ready. 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 improving, and we expect this to continue to improve with lower risk to LI participants and higher rewards.