

# Low Income Recruitment Report

## October 2021

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

### Summary:

Currently, the program is very strong with Low Income (LI) recruitment goals. We have 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 LI participants 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 PM's estimate 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 does 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 10/31/2021	Recruited (Individuals) 10/31/2021	Assigned (Individuals) 10/31/2021	Waitlist	Goal	% Completed
PGE	450	364	176	177	212	171%
PPL	68	60	0	65	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 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 10/31/2021	Assigned (Individuals) 10/31/2021	Assigned (Master Meter) 10/31/2021	Goal	% Completed
PGE	111	78	762	840	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 (and contracts signed) to reflect results as well as projections.

Total Recruitment Goals			
	Total LI Participants	PM Recruitment	LIF Recruitment
PGE	1890	1148	742
PPL	746	351	485
IDP	136	76	60

<b>Total</b>	<b>2772</b>	<b>1575</b>	<b>1287</b>
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