

# Low Income Recruitment Report –

## December 2021

This recruitment report highlights the monthly activities the Low-Income Facilitator (LIF) has conducted through December 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 in a very strong place with our Low Income (LI) recruitment goals. As of the end of December 2021, there is a waitlist of over 150 participants currently being assigned to open projects, with more projects ready to take on assignment as soon as Project Managers are ready. Stronger program design means opportunities for diverse, efficient outreach, and we anticipate that the next tier of the program provides more reasons for optimism.

60% 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). This percentage will continue to decrease for Tier 1 as the remaining LI subscribers will be recruited by the LIF.

Proposed changes to the Program Implementation Manual will help to ensure a diverse array of LI participation in the program, and a demographic analysis of current participants will guide our next round of outreach activities so that our LI subscribers accurately reflect Oregon's LI utility customers.

### 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.

At the end of this month, we have two projects open for LI recruitment, and are currently assigning from the waitlist.

**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:** The sum of Recruited Individuals and the Waitlist divided by the goal utility territory

All numbers are cumulative from March 1, 2020.

Current LIF Participant Management						
	Current Participants 12/31/2021	Recruited (Individuals) 12/31/2021	Assigned (Individuals) 12/31/2021	Waitlist	Goal	% Completed
PGE	505	414	348	157	549	104%
PPL	86	76	4	82	4	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 no Project Managers are recruiting LI participants.

**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 12/31/2021	Assigned (Individuals) 12/31/2021	Assigned (Master Meter) 12/31/2021	Goal	% Completed
PGE	114	81	762	843	100%
PPL	4	4	314	318	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 Participants	PM Recruitment	LIF Recruitment
PGE	1689	1033	656
PPL	746	306	532
IDP	136	76	60
<b>Total</b>	<b>2573</b>	<b>1415</b>	<b>1248</b>

### *Equity Snapshot*

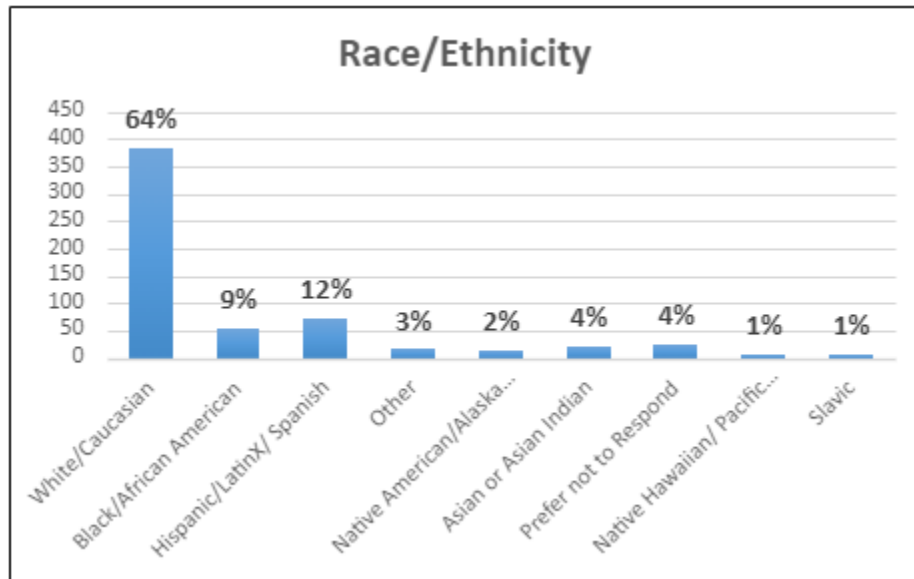
CEP collects demographic information during intake, to ensure the Program is made available to those who have been left behind by traditional solar. Once per quarter we highlight two statistics to share here. These statistics are for individual LI subscribers only, not including master metered participants, 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:

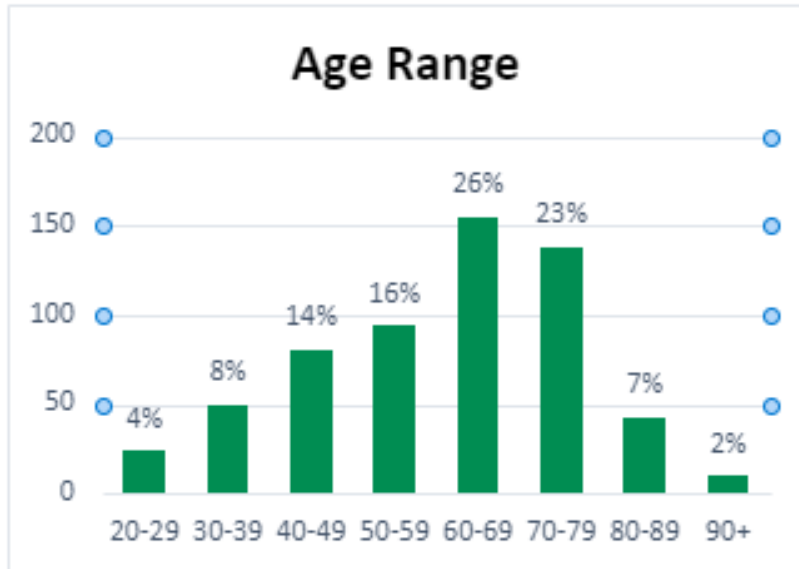
- About 33% of our participants identify as a person of color.
- 62% of our participants are or live with a person 55 years of age or older
- 10% of our participants are, or live with, a veteran.
- 50% of our participants identify as having someone with a disability in their household.

- 82% of our participants have an annual salary that is less than \$30,000

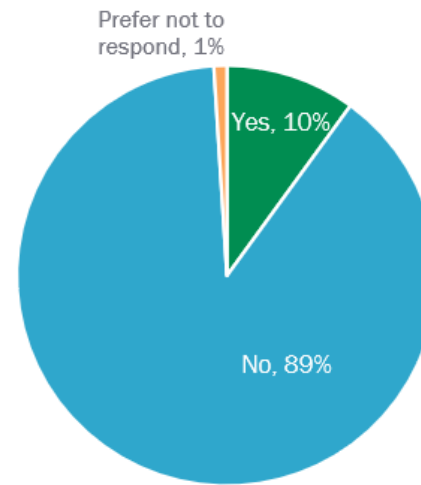
What is your Race/Ethnicity?



Age of Subscribers



Is anyone in your home a veteran?



## Program Development and Highlights

### Outreach

Outreach must be done carefully, so that the waitlist does not become too large and LI customers are not waiting for long periods of time to be assigned to a project. Long wait times on waitlists create frustration and turnover, wasting time for customers and the LIF. Once we have assigned the rest of our current LI waitlist, we will have approximately fewer than 200 PGE slots available in Teir 1.

After a demographic analysis of our reach, we noticed that the language preferences represented in low-income participants does not reflect Oregon's LI population. In December, CEP used surplus funding to hire a part-time Community Solar Spanish Campaign Coordinator in order to address the growing language needs of the program. We have already connected over 20 Spanish-speaking participants to projects and will continue this outreach into 2022. We aim to strengthen our partnerships statewide with Hispanic and Latino communities and organizations moving forward.

In addition to increasing our capacity to connect with the Spanish-speaking community, we utilized the remainder of 2021 to wrap up any active outreach campaigns and identify any areas of focus for 2022 outreach. This primarily involved making final callbacks to residents who received the PGE Low-Income Letter to ensure no one that expressed interest was missed during the flurry of calls we received. In 2022, we will conduct targeted outreach to address additional gaps in participant diversity, including households with children, people of color, residents 20-40 years old, and those whose primary language is neither English or Spanish.

We continue to regularly provide our virtual *Saving with Solar* presentation to the public. 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. We have also combined the *Saving with Solar* presentation with other existing workshops focused on energy savings and utility resilience.

The following table shows how effective different forms of outreach have been by examining who both responded to marketing and had enough interest to go through the intake process. This includes participants who are currently assigned to projects, currently on the waitlist, and those who have left the program between intake and project assignment for any reason. Please note that Project Manager Recruitment is all grouped together into one section for the ease of reporting. Project Managers utilized a variety of recruitment methods, including partnering with low-income housing providers and other CBOs, door-to-door canvassing, and physical and digital marketing.

**How Did You Hear About the Oregon Community Solar Program?**



<b>Source</b>	<b>Total Participants</b>	<b>Percentage</b>
PGE Low Income Letter	272	37%
Utility Bill Inserts & Website	116	16%
Project Manager Recruitment	114	16%
Community Energy Project Programs	107	15%
Partnership Referrals	51	7%
Physical & Digital Marketing	35	5%
Word of Mouth	18	2%
Unknown	15	2%
<b>Total</b>	<b>728</b>	<b>100%</b>

### **Program Implementation Manual (PIM) Updates**

The PIM outlines the rules of the program, and is occasionally modified with lessons learned. In the next version of the PIM, there will be a cap for master metered projects to take up 5% of the LI project threshold. In the past, 100% of the LI requirement could be met with master meters, but the problems in the program making that a necessity have since been resolved. LI customers in master meters can still take part in the program with direct financial benefit, but at least half of each project has LI customers are individuals choosing to take part in the program.

There will also be further clarification on the support PM's are expected to provide to subscribers who need or prefer information in languages other than English, such as translated contracts. The LIF will not be able to diversify LI subscribers to reflect the state if the process beyond intake is inequitable between participants.