

Energy Affordability & Accessibility Collaborative

October 20, 2021

AGENDA

9:30am 5 min	Welcome/Agenda Review	Anne Armstrong - MPSC
9:35am 10 min	Guiding Values	Briana Parker – Elevate Briana DuBose - EcoWorks
9:45am 10 min	Community Concerns and Solutions	Briana Parker – lead and All
9:55am 50 min	The Customer Journey Utility Assistance Programs: Participation/Enrollment Q&A	Moderator: Elaina Braunschweig - MPSC <i>AAA Subcommittee Lead</i> Panelists: Consumers Energy DTE SEMCO UPPCO Indiana Michigan Power
10:45am 50 min	The Customer Journey Human Service Agency Processes Q&A	Moderator: Jamie Curtis - MPSC <i>AAA Subcommittee Lead</i> Panelists: Nicole Fanjoy - True North Angela Sterner - Salvation Army Sean Scane/Tasha Ball - United Way SE MI
11:35am 20 min	Improving the Customer Journey Brainstorming Session	Moderator: Mary Wilkins – Salvation Army <i>Definitions Subcommittee Lead</i>
11:55am 5 min	Subcommittee Updates – written Next Steps	Anne Armstrong - MPSC

Update: Where We've Been, Where We're Going

Anne Armstrong - MPSC

EAAC CHARGE

To implement the Commission recommendations from the [February 18, 2021 U-20757](#) order and to file the first interim report to the docket on 12/17/2021.

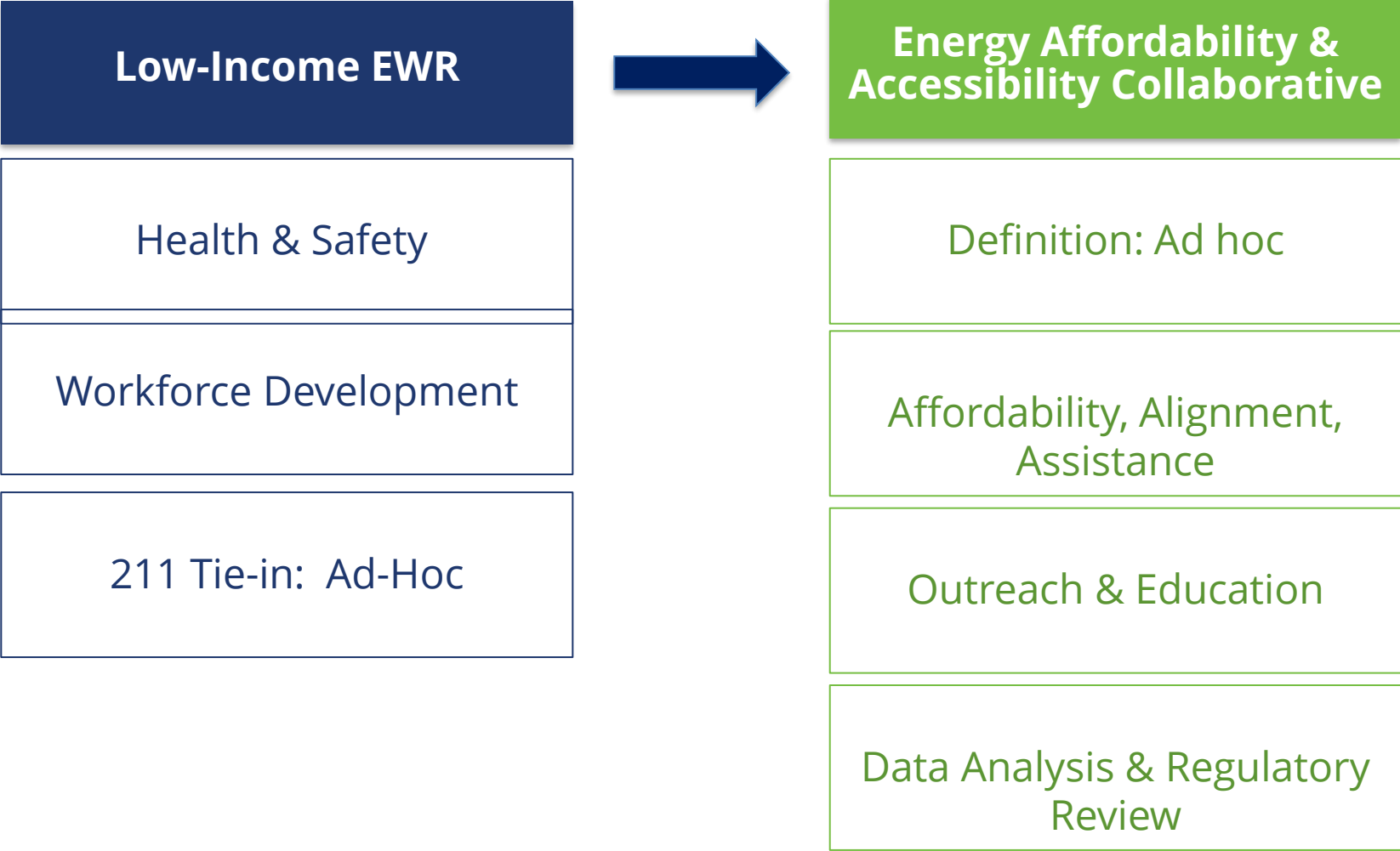
Commission Priorities:

- Ongoing COVID-19 response
- Recommend approaches for simplifying the energy assistance and customer protection systems, working with the EWR low-income workgroup
- Explore a common definition of energy affordability and energy security with the goal of reducing the number of households in Michigan with unsustainable energy burdens
- Emphasize the importance of data collection, transparency, and analysis to inform program design and policy changes
- Review rule-based protections
- Communication and engagement

TWO CONCURRENT PRIORITIES

- **COVID-19 Response**
 - ✓ Outreach and education
 - ✓ Program and policy revision to meet immediate needs and reduce immediate barriers
- **System Analysis and Recommendations for Long Term Reform**
 - ✓ Sustainable affordability
 - ✓ Establish process for high energy burden/low-income communities to influence policy development
 - ✓ Expand and Increase ease of access to services
 - ✓ Collection of data for protection, safety and equity

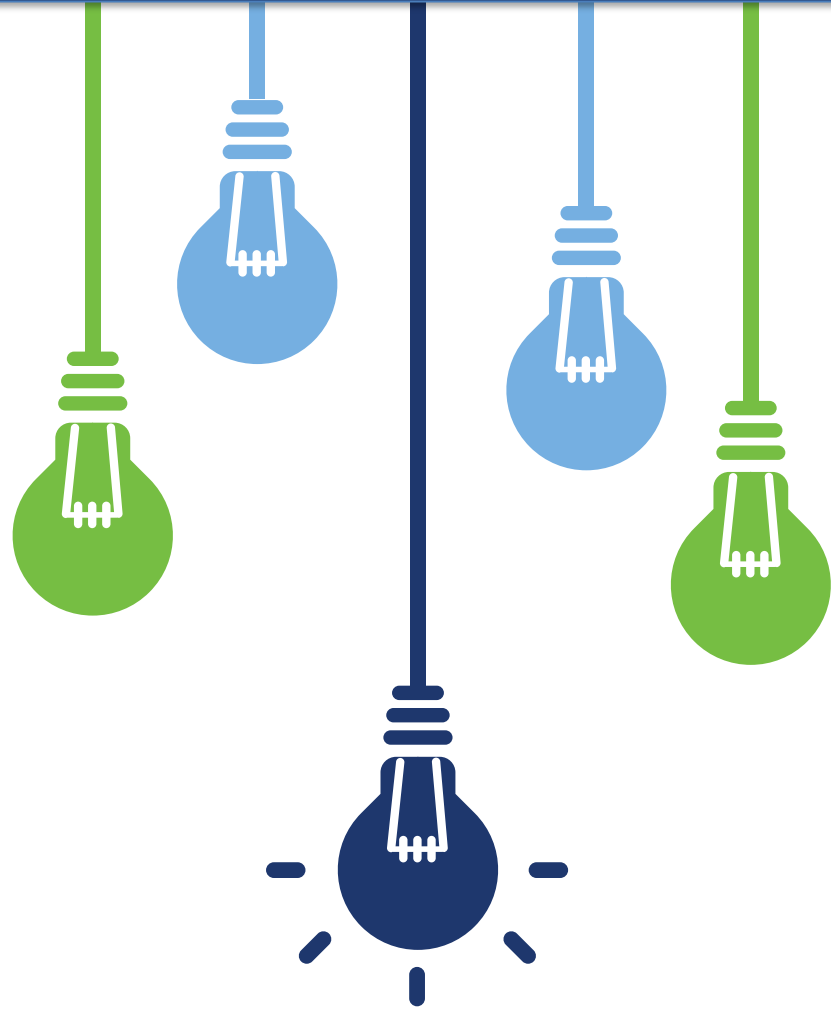
EAAC STRUCTURE



WHERE WE'VE BEEN



RECAP OF LAST MEETING



Deepen understanding of how energy assistance works in Michigan, including the energy assistance linked to rental assistance as a foundation for understanding the customer journey.



Group discussion on brainstorming the transformation from crisis assistance to prevention.



Listen to the community concerns.

TODAY'S MEETING: CUSTOMER JOURNEY

01

AAA committee
stakeholder driven



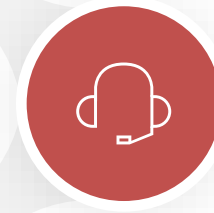
03

- Agency processes
- 211
 - MI Bridges
 - By phone or in-person



02

Utility processes



04

Brainstorming
session on
improving the
customer journey



WHERE WE'RE GOING

Customer Perspective
in future meetings

- Testimony
- Listening sessions

Continue intensive work
with all subcommittees,
including LI-EWR
subcommittees

START



Interim Report by
12/17/2021



Establish Data and Regulatory
Analysis Subcommittee



Integrate the EAAC and
the LI-EWR workgroup



ELEVATE



MPSC EAAC Guiding Values Segment

- EAAC Guiding Value: **Operate with Integrity**
- Introduction to Guiding Value: Let's Work together!
 - Define
 - Example
 - How can we enhance active listening and communication?
- **How do we implement?**
- **Follow up & Next Steps**

MPSC EAAC Guiding Values



1. Advance racial and economic justice
2. Enhance environmental justice
3. Active listening and communication
4. Operate with integrity
5. Ensure inclusion
6. Practice accountability
7. Encourage collaboration
8. Follow leadership from impacted individuals and communities
9. Education and awareness
10. Promote transparency

- **What does it mean to actively listen and communicate with communities?**

- Equity-based communication puts community first. Unlike some traditional communications models where messages are developed in a silo **for target audiences**, in an equity-based model, communications are co-developed **by communities** through close partnership with individuals and organizations who lend their time, energy and expertise to the effort.
- Inclusivity shouldn't be treated as a side project but rather fully ingrained in the culture, similarly to the way we are now all thinking about sustainability broadly. One way to do that is to get better at active listening. Active listening is at the core of Inclusion, and it ensures that barriers are dealt with by asking curious questions and doing your own research.
- **Case Example**

Guiding Value: Active Listening & Communication



- **How can we (EAAC) work to ensure that we are actively listening and communicating with communities?**

Community Concerns and Solutions

ALL

Led by Briana Parker – Elevate

The Customer Journey Utility Assistance Programs Participation and Enrollment

Moderator: Elaina Braunschweig - MPSC

Panelists: Consumers Energy

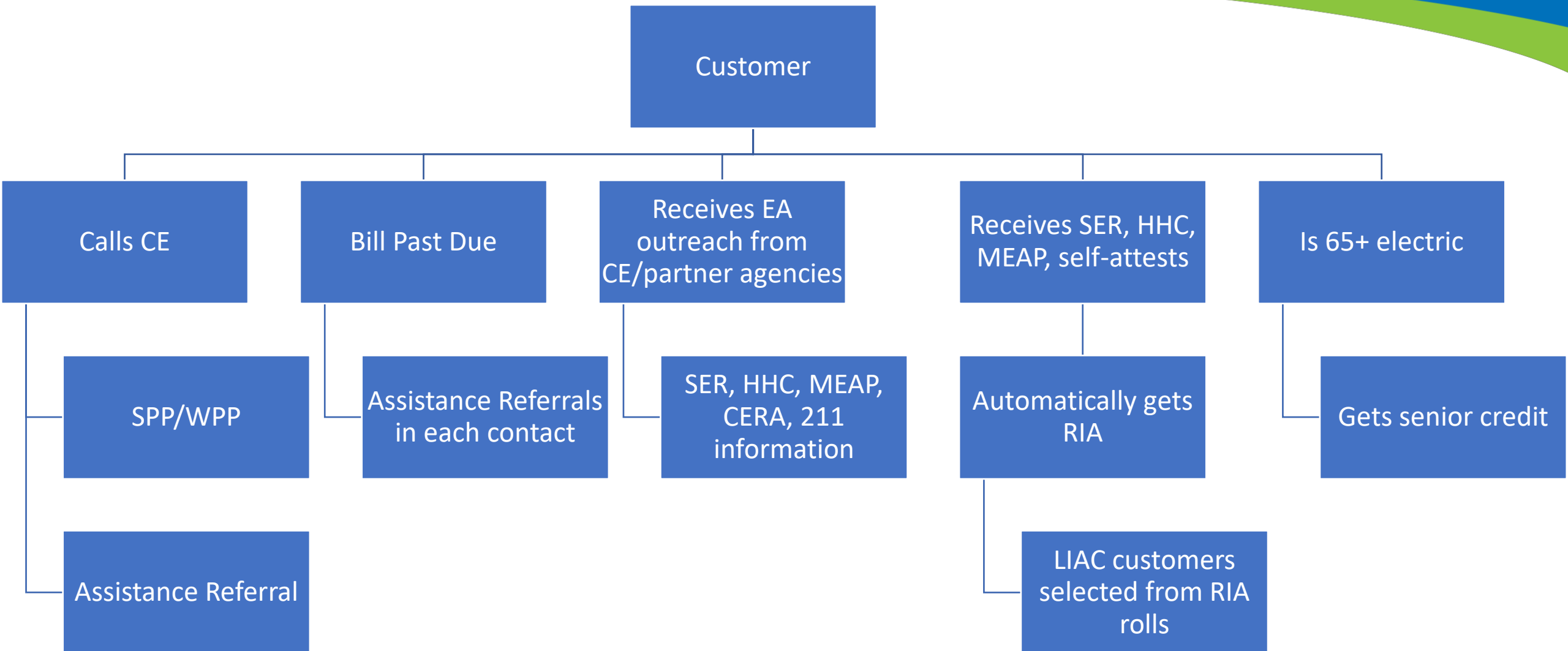
DTE

SEMCO

UPPCO

Indiana Michigan Power

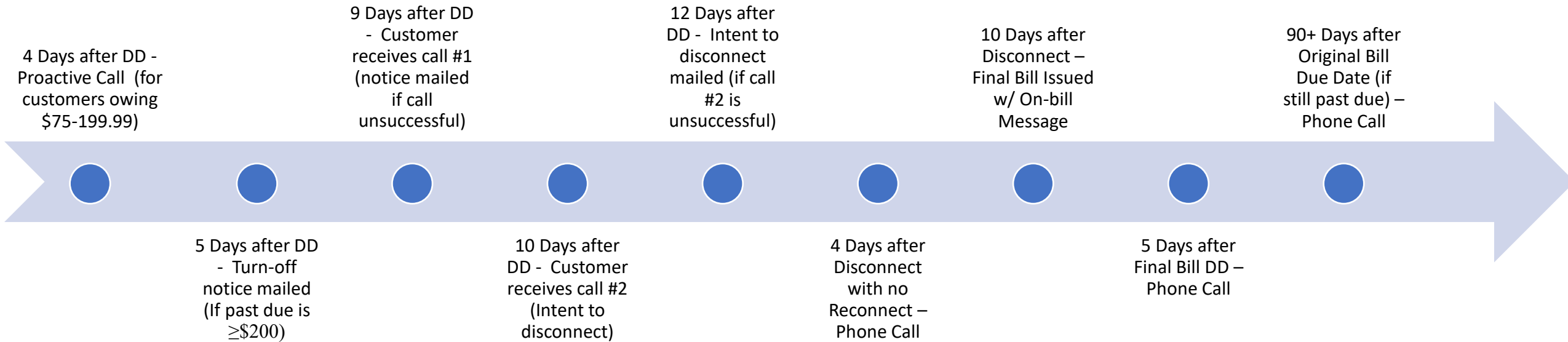
Consumers Energy Customer Journeys – Pathways to Assistance



Past Due Customer Communications - Assistance

Updated 9/14/21

Communication Timeline



*Appendix 1: Verbiage

Other Energy Assistance Communications

Regular Activities:

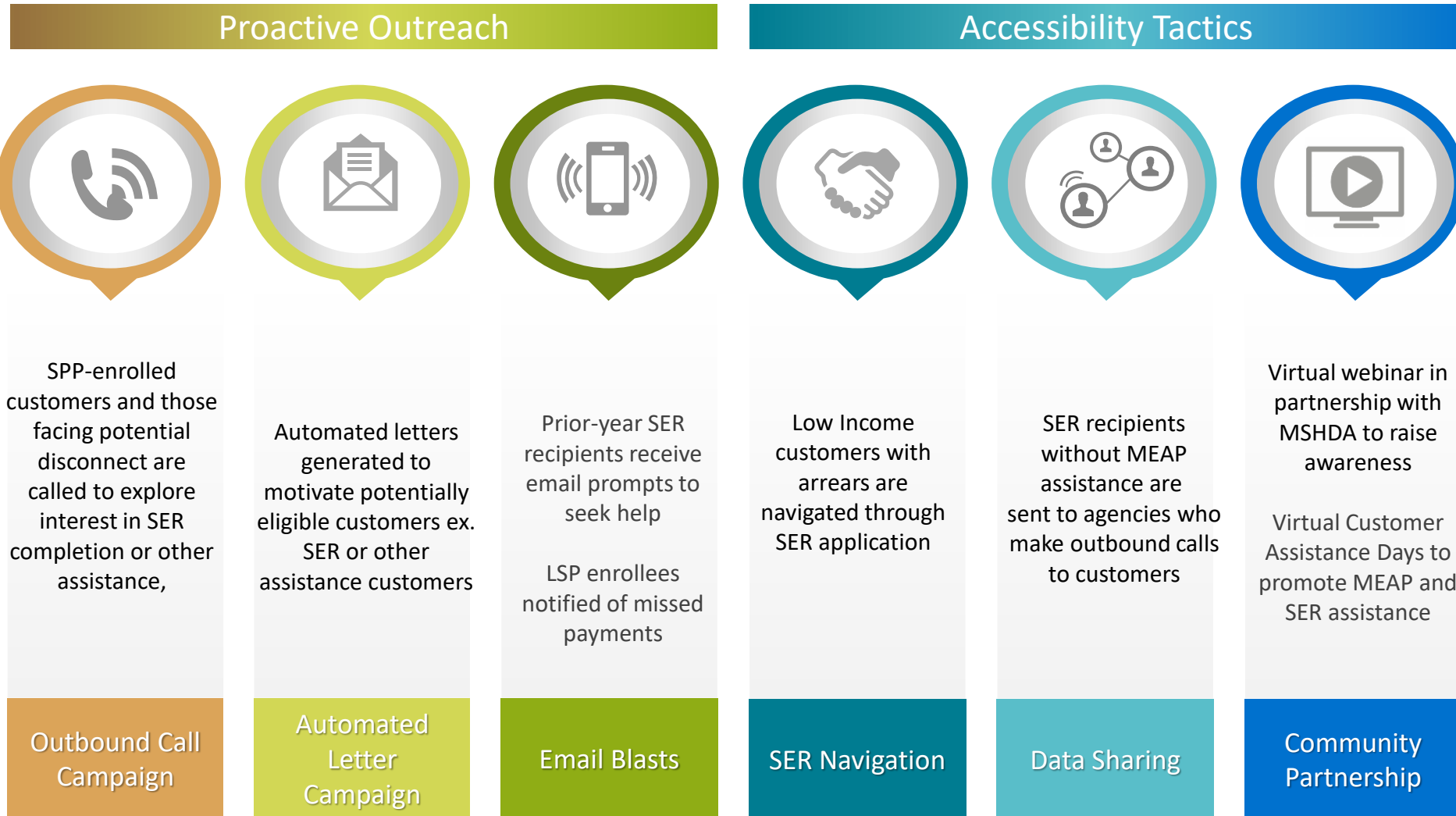
- Home Heating Credit outreach
- State Emergency Relief outreach
- MEAP/CARE outreach
 - MEAP agencies
 - CE
- CARE customer outreach for EWR services
- Community events
- Customer communications – DPOs, call center, field team, community affairs team
- Customers automatically connected to Helping Neighbors for EWR and EE services

2021 Activities:

- 2-1-1 statewide campaign
- CERA statewide campaign
- MIHAF outreach campaign*

*Outreach is performed by reaching out to customers who received assistance last year to see if they need it again in the current year.

To continue driving arrears reduction and accessibility to energy assistance, we leverage our existing processes and our targeted proactive outreach to income-challenged customers

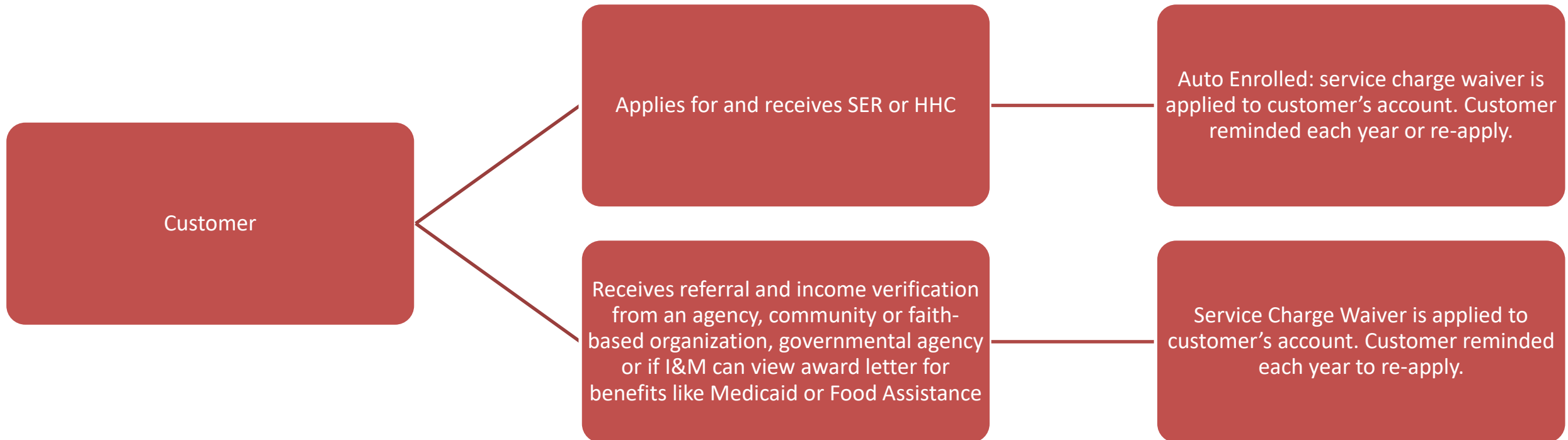


EWR and EE Offerings

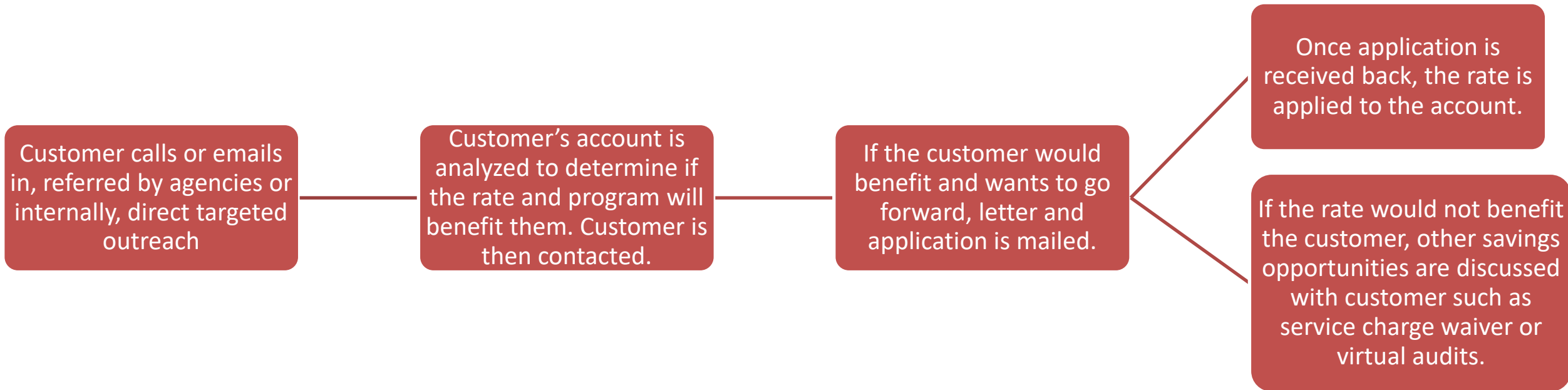
Revenue management protection team hands a list off to EWR team at DTE monthly with customers who are:

1. On shutoff protection
2. Almost eligible for LSP (APP program) but aren't because of consumption level
3. On LSP with increasing usage that could lead to disqualification

Customer Journey – Low Income Customer Service Charge Waiver



Customer Journey – Senior Citizen Discount Rate

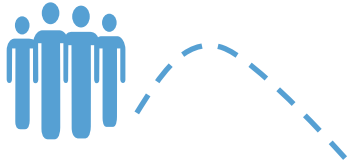


IQ Programs - Outreach

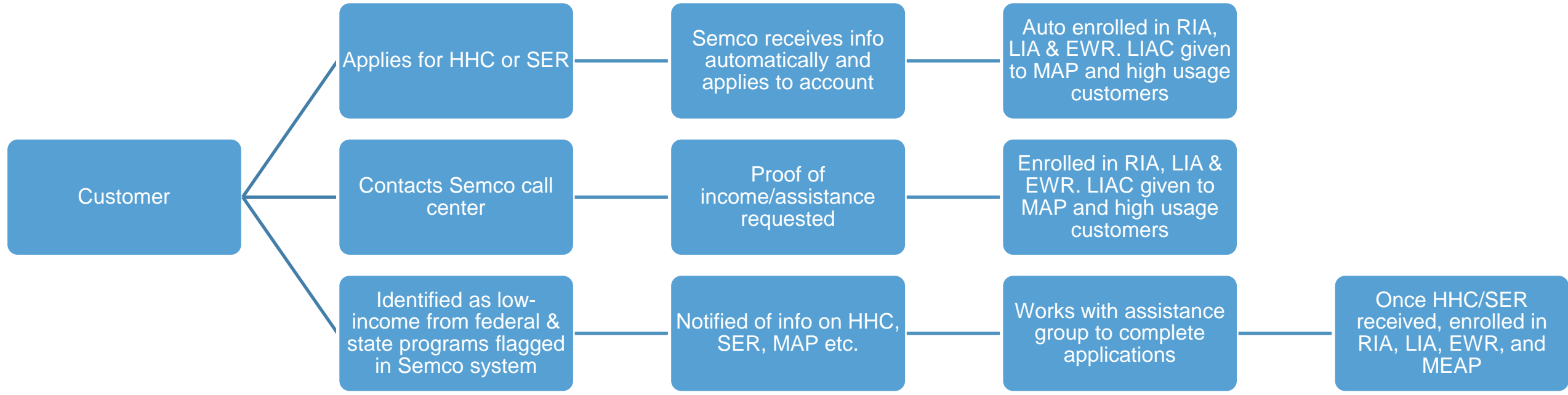
<https://electricideas.com/at-home/at-home-michigan/>

Multiple outreach efforts to market these programs:

- Targeted email campaigns focusing on various IQ EE, EE, and Customer Assistance Programs
- Targeted direct mail for all IQ EE, EE, and Customer Assistance Programs
- Outreach to income-qualified, multi-family housing complexes, senior centers, non-profits, community action agencies, faith-based groups, governmental agencies, etc.
- EE newsletters
- Bill inserts
- eHERs (Home Energy Reports)
- Boosted Social Media (1x per week each)
- Facebooks Ads
- ElectricIdeas.com cross-promotion in email campaigns
- Events and sponsorships
- Worked with agencies and other community groups to distribute program flyers to eligible clients through food commodity days, back to school back packs distribution, through case management for other programs, etc.



Utility Low-income Programs



Low-Income Outreach

- Targeted mail and outbound call campaigns
 - Regular outreach to customers identified as low-income
 - Mass communication to all residential customers to share info on available programs
- Flagging accounts in the system for outreach
 - SER and/or HHC recipients
 - Other assistance funds received (MEAP, CERA, etc.)
 - Interest in receiving assistance
- RIA recipients also enrolled in reduced rate for EWR
- Third party conducts outreach for additional EWR services

UPPCO Outreach and Programs

- Info on website
- Referrals to other agency assistance
- Bills, bill inserts, on notices
- EASE APP
- Marketing and campaign development through new low-income position aimed to liaise low-income and EWR

Leadership Questions

- What areas would you like to see improvement?
 - Not collecting income data from customers makes it difficult to reach out to customers. Need mechanism to identify customers from DHHS or Treasury
 - UPPCO looks at accounts from low-income housing areas-- outreach opportunity

Q&A and Recommendations

What recommendations do you have for the utilities for improvement?

- It seemingly should be mandatory that every household at risk of shutoff should receive a physical energy efficiency needs assessment
- Need a way to receive info from DHHS about income level, Medicaid recipients etc.
- Customers should not have to reapply for assistance each year
 - The requirement is in the statute
- Other states have website that people can connect to--presented at NEUAC--where agencies and utilities can connect to for data sharing
- Commission should investigate HMIS developed by HAND (homeless action network Detroit) and CERA database--can see where service clients are connecting

The Customer Journey Human Service Agency Processes

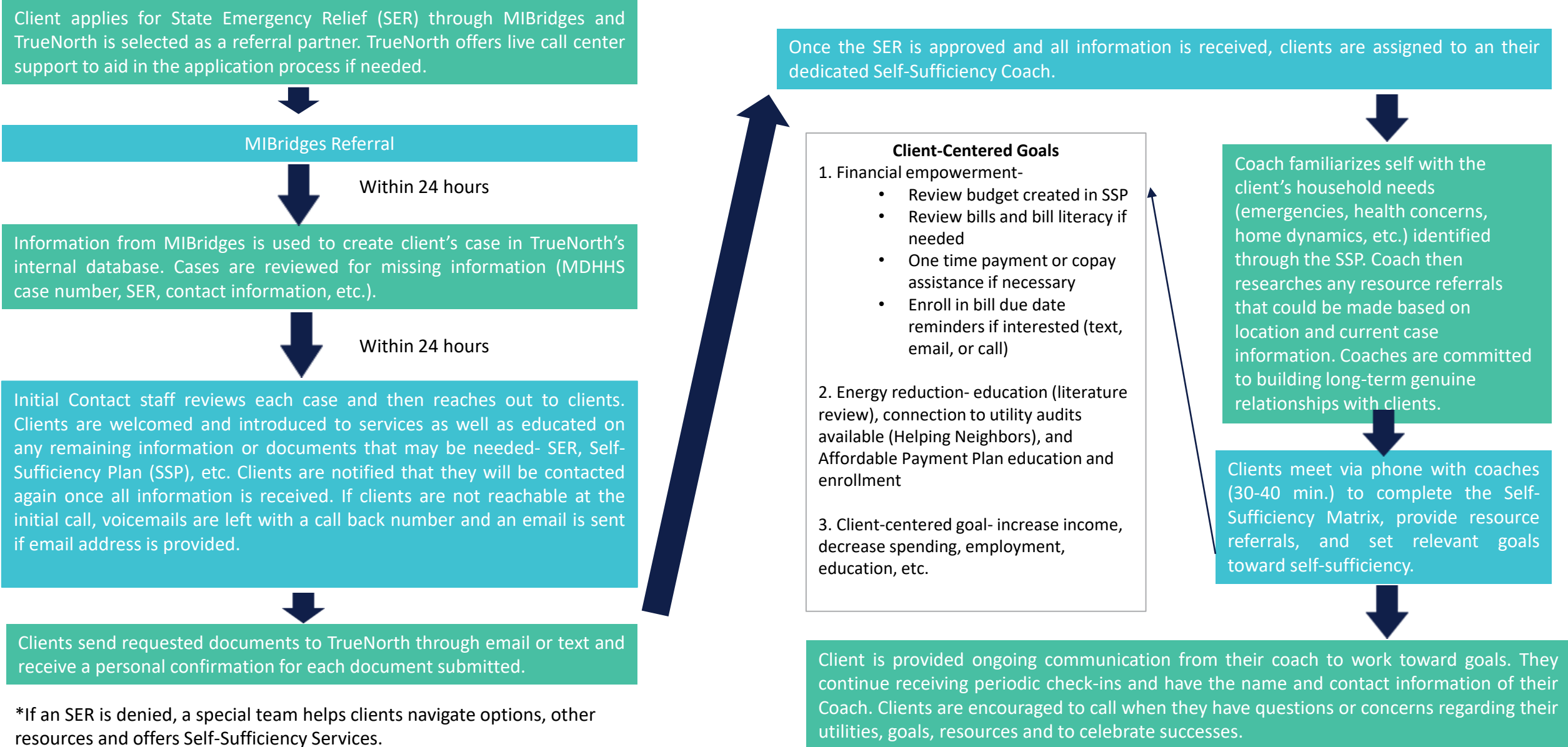
Moderator: Jamie Curtis - MPSC

Panelists: Nicole Fanjoy – True North

Angela Sterner – Salvation Army

Sean Scane/Tasha Ball – United Way SE MI

TrueNorth MIBridges Customer Journey Map





Salvation Army Customer Journey

Angela Sterner
October 20, 2021

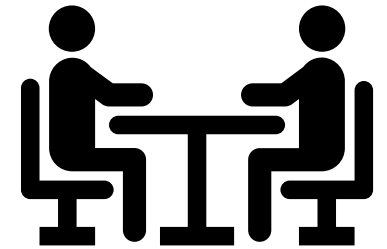


Overview

- Customer Journey via In-person & Phone
 - MDHHS State Emergency Relief (SER)
 - Michigan Energy Assistance Program (MEAP)
 - Salvation Army Services
- Challenges

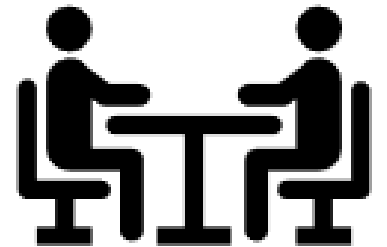
In Person Appointments-Needs to Apply for SER

- Case Manager helps customer apply for SER (customer may also need to create account)
- Discuss possible APP and bill payment assistance options once SER is received
 - Delayed crisis resolution until SER decision-place hold on customer account if possible
- Complete MEAP Energy Security Plan
- Discuss Energy and Financial Education (topic based on needs)
- Discuss options for energy optimization by energy supplier
- Place hold if applicable
- Discuss Salvation Army Case Management approach Pathway of Hope and other Salvation Army programs and services
 - Emergency food Pantry, other financial assistance, After School Program, outside referrals



In Person Appointments- Already approved SER

- Complete MEAP Energy Security
 - Discuss Affordable Payments Plan options & Bill payment
 - Customer decides which type of assistance would work best
- Discuss Energy and Financial Education (topic based on needs)
- Discuss options for energy optimization by energy supplier
- Discuss Salvation Army Case Management approach Pathway of Hope and other Salvation Army programs and services
 - Emergency food Pantry, other financial assistance, After School Program, outside referrals
- Place commitment hold if applicable
- Customer receives approval letter and additional information from the topics discussed for energy and financial education



Phone Interviews

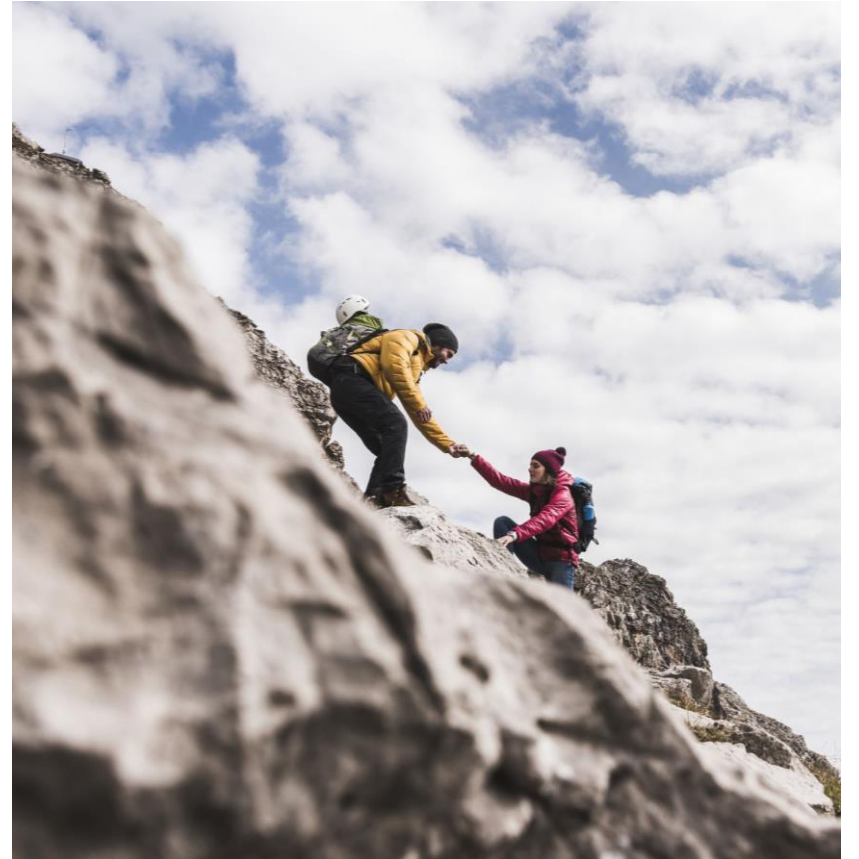
Phone interviews are almost the same as in person

- Differences
 - Obtain SER (if we are unable to, easiest way for customers)
 - Customers can use smartphone to email or text SER picture
 - Drop off
 - Add caseworker as their navigator in MI Bridges portal
 - We obtain customer verbal consent for documents
 - Documents for energy and financial education can be emailed or mailed to the customers



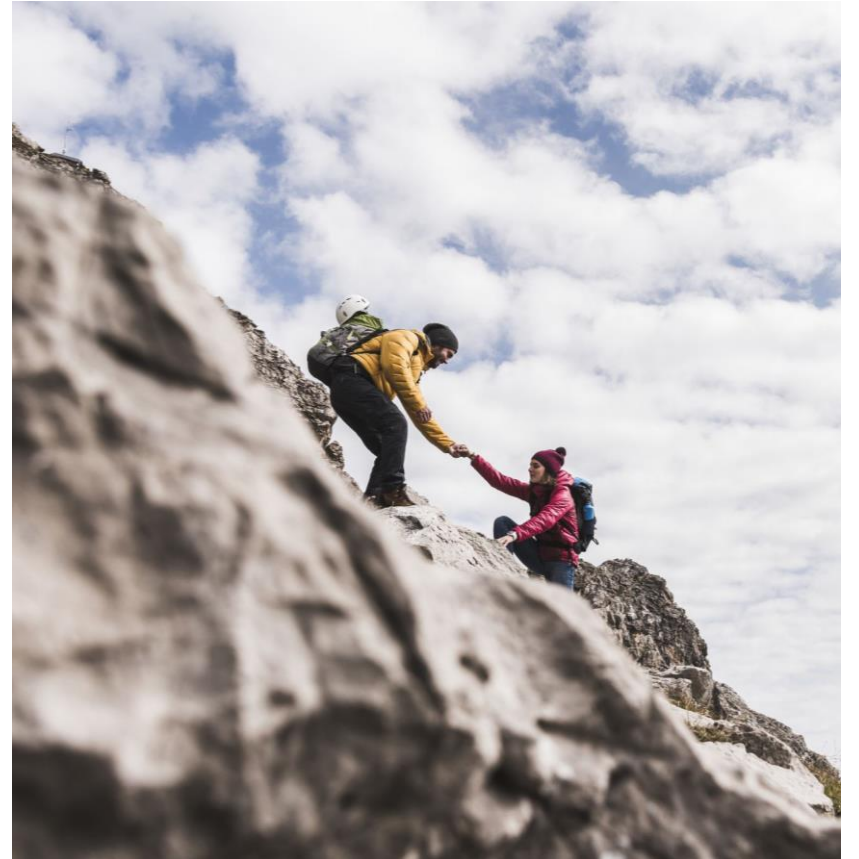
Challenges

- Length of appointments: complete application, assess needs, provide referrals, provide energy/financial education, etc.
- Crisis not resolved at appointment when we assist customers apply for SER
- Customers apply for assistance with multiple agencies
- Customers unable to get into their MI Bridges account
 - Customers cannot remember their login information
 - Phone number is already associated with another account.



Challenges (continued)

- Customers waiting for SER's
 - Customers that wait for their SER to arrive via mail then reach out for assistance.
 - Mail delay- by the time customers reach out to us for assistance they must reapply for SER because SER expired.
- SER Denials
 - Customer did not provide additional information
 - Ineligible



**United
Way**



**United Way
for Southeastern Michigan**

2-1-1 and MEAP
Presentation

Presented by Sean Scane and
Tasha Ball



Customer Journey: 2-1-1 to MEAP

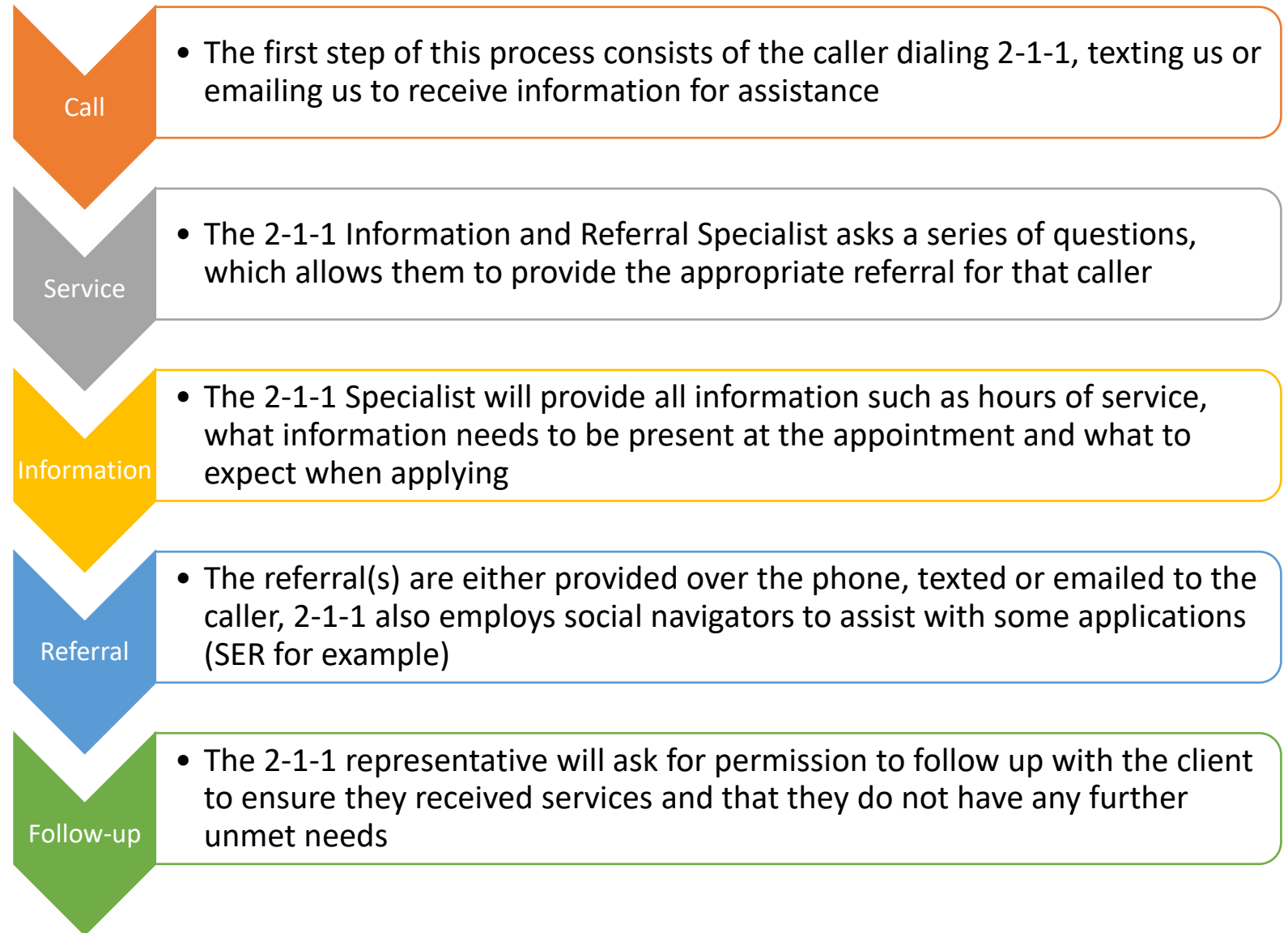
- 2-1-1 is an anonymous information and referral service that provides information and referrals to 204,054 callers per year in Southeastern Michigan
- In Southeastern Michigan, we see approximately 39,644 people call for utility services each year
- Our Information and Referral specialists utilize our 2-1-1 database that contains nearly 1,300 agencies at 2,600 sites, with over 8,500 programs to refer to in our region
- Each county has an assigned Resource Specialist, who acts as a liaison for all the organizations in their coverage area
- We frequently see utility assistance as one of the top resource requests in our region

How does the community hear about 2-1-1?

Marketing:

- We market 2-1-1 heavily as a resource for the community through various marketing methods – billboards, mailings, radio and tv spots, etc.
- 2-1-1 is also frequently mentioned by other agencies, state government and public leaders as a source for information for those who need it most
- 2-1-1 provides referrals based on location (zip code) and what the best referral for that area is for each caller
- United Way for Southeastern Michigan is one of seven 2-1-1's within the state

What does the 2-1-1 process look like in practice?



2-1-1 to MEAP at UWSEM

The majority of our MEAP program traffic at UWSEM comes through 2-1-1 referrals

When the caller receives their referral for utility assistance, they receive our agency name and phone number and the information that is necessary to apply for SER/MEAP and how to get started in the process

When our MEAP program receives a referral from 2-1-1, we assist them through the full application process if they have not already applied for State Emergency Relief

We have set up our systems to allow for callers to self-apply if they feel comfortable with that process

MEAP Application Process

We utilize 2-1-1 heavily in our MEAP program at United Way

When COVID started, we set up a MEAP call line that works similarly to 2-1-1 to provide application assistance over the phone

Throughout the application process, we screen for additional benefits that may help the caller and provide those referrals by utilizing the 2-1-1 database

If a client is not eligible for SER or MEAP services, we utilize 2-1-1 to provide referrals and services that may be more appropriate for the caller

MEAP Application Process

We ask a series of questions at the beginning of our online application that uses logic to include or exclude additional referrals/resources/information within the rest of the application. We use this application for one time assistance, APP enrollment and deliverable fuels.

United Way for Southeastern Michigan

[Programs](#) [My Applications](#) [i](#) Sean Scane

I am filling out this application with assistance from a Care Coordinator over the phone.

Yes

No

Have you applied for State Emergency Relief on or after 10/1/2021?

Yes

No

Are you seeking assistance with a co-pay with no interest of enrolling into an Affordable Payment Plan (such and DTE's LSP Program, Consumers CARE Program or SEMCO's MAP Program?)

Yes

No

N/A

MEAP Application Process

For instance, if someone is self-applying (without assistance from a Care Coordinator) and has not filled out their SER application, they will be prompted to do so:

United Way for Southeastern Michigan Programs My Applications Sean Scane

I am filling out this application with assistance from a Care Coordinator over the phone.

Yes

No

Clear

Have you applied for State Emergency Relief on or after 10/1/2021?

Yes

No

Clear

If no, please visit the following link to complete the State Emergency Relief application, and select United Way for Southeastern Michigan as your referral partner:

[Link to apply for State Emergency Relief through MI Bridges](#)

MEAP Application Process

If the client is applying for assistance and they have a provider that offers an Affordable Payment Plan, our database will pitch enrollment into the plan to them.


Step Two

You may be eligible to be enrolled into DTE's LSP program, which allows you to pay an affordable monthly payment while reducing any past-due balance that you have with DTE. Are you interested in applying for this program?

Yes

No

MEAP Application Process



We automatically refer clients to certain services based on the information we are gathering from them. For instance, if someone is a DTE client and they are applying for assistance they are automatically prompted to sign up for a Home Energy Consultation. If it was Consumers or SEMCO, it would automate for their programs as well.

DTE Home Energy Consultation

Interested in taking your Energy Saving Tips a step further? DTE offers a FREE Home Energy Consultation that you may qualify for. During this consultation a DTE Energy Specialist will visit your home to help you determine where your home uses the most energy and identify things that you can do in every room to save energy.

To receive a FREE Home Energy Consultation, sign up using this link: [Home Energy Consultation](#)

MEAP Application Process

When all the application materials are received, our Care Coordinators decide on the outcome based on the MEAP criteria:

- If someone is denied assistance, they automatically receive a referral back to 2-1-1 for additional referrals that may be able to help
- When someone is approved for MEAP for an Affordable Payment Plan, we enroll them immediately into the program via the utility database. If they were approved for one-time assistance or help with deliverable fuels, they are submitted into an approval form that we submit for payment weekly.
- For those who are approved, we use our “good news” moments to pitch A16 services and our MEAP Success Planning program. We are testing this year whether people are more likely to engage in these services after hearing the following:
 - That their application was approved
 - That they received the first payment to their account

MEAP Success Planning

In our MEAP Success Planning Program, we have four focus areas:

- Building Financial Skills
- Employment Coaching and Training
- Reducing Energy Consumption
- Maximizing Benefits

Within these focus areas, we provide direct support to clients but also utilize our 2-1-1 database to personalize referrals for services that may be able to further assist our clients in each area. This allows us to provide additional referrals that are focused on long-term goals as opposed to the short-term crisis.

Questions?

Improving the Customer Journey Brainstorming Session

Moderator: Mary Wilkins – Salvation Army

Next Steps

Anne Armstrong – MPSC

FIRST YEAR DELIVERABLES: 12-17-21 PROGRESS REPORT

- Establish consensus values for conducting meetings and outputs - *done*
- Demonstrate outreach to and participation of impacted and under-represented groups - *ongoing*
- Demonstrate on-going COVID-19 response including program adjustments; outreach & education efforts - *ongoing*
- Demonstrate progress on recommendation for energy affordability definition - *ongoing*
- Demonstrate coordination between Low Income EWR workgroup, EAAC, utilities and MPSC - *ongoing*
- Recommend structure for tying EWR programs to energy assistance programs – *staff work in progress, EAAC work scheduled for early 2022*

NEXT STEPS

- EAAC Meetings are the 3rd Wednesday of the month
- Next Meeting: November 17, 2021, **9:30 a.m. to 12:00 p.m.**
 - ✓ Community Concerns
 - ✓ Subcommittee presentations on work to date
 - ✓ Update on interim report process
- [Documents and Resources Page](#)
- Affordability, Alignment and Assistance Subcommittee update [here](#)
- Low-Income Energy Waste Reduction Workgroup next meeting is November 4, 2021, event info [here](#)

Thank You for Participating

Anne Armstrong – armstronga3@michigan.gov



BIO: Niki Fanjoy, Division Director Heat and Energy Programming TruNorth Community Services

This will be Niki's 7th year working closely with the MPSC, MDHHS and the other MEAP grantees to connect clients to emergency heat and energy needs as well as walking alongside them on their path towards self-sufficiency. Also helping with this presentation are Jacqueline Smith and Marissa Boerman, both part of the leadership team for the Heat and Energy program.

BIO: Sean Scane, Program Director MEAP and CERA Operations United Way for Southeastern Michigan

Sean has worked in various roles at United Way within the utility assistance department over the last 6 years and has helped strengthen and innovate the program to increase their impact. Sean oversees the MEAP program at United Way and ensures they are connecting their clients to opportunities for long-term outcomes.

BIO: Tasha Ball

Data and Performance Manager of 211 United Way for Southeastern Michigan

Tasha oversees the performance of 6 counties with the largest population of people in Michigan. Her background at United Way started in the utility assistance program and later moved to manage the 2-1-1 department. As the Data and Performance Manager of 211, she works to ensure UWSEM's data integrity and quality, as well as managing the day-to-day operations of the contact center.

BIO: Angela Sterner, MSW

Salvation Army

Angela has worked at The Salvation Army for more than ten years serving in various positions within energy assistance. Since April 2018 she has been in the role of the Energy Assistance Services Director. Angie participated in the Michigan Public Service Commission workgroup that revised the utility billing rules to provide protections for vulnerable customers. Angie serves on the National Energy and Utility Affordability Coalition (NEUAC) Board and on the executive committee of Michigan's Coalition to Keep Michigan Warm.

BIO: Mary Wilkins

Salvation Army

Mary is a social service professional with more than 30 years' experience serving the needs of low-income households. She earned a bachelor's degree in Philosophy from Hope College and a Master's in Social Work from Western Michigan University. For more than half her career she has been directly involved with The Salvation Army's state-wide Energy Assistance Services in Michigan as well as overseen housing, SUD treatment, financial assistance, food security and other programs as a Divisional Social Services Director. During Mary's tenure she had been an active participant in the Coalition to Keep Michigan Warm, participated in Senator Caswell's low-income energy work group, and most recently has served on the executive committee of the National Energy and Utility Affordability Coalition (NEUAC). Mary currently serves as a Program Consultant for The Salvation Army from her home in northern Michigan.