

## Coordination Between EWR, Weatherization, Community Organization Assistance Programs and Bill Assistance

### Barriers:

- Funding is there, but not utilized
- Funding optimization for all parties (agency, customers, utility)
- Education and knowledge of all programs
- Permissibility and use of funds

### Opportunities:

- Create a baseline/ matrix of existing programs & services (and limitations)
  - Categorize by topics (EWR, Bill assistance, weatherization)
- Relationship development

### Additional Considerations:

- Make sure this is not redundant with CKMW activities
- Coordinated marketing/outreach
- Coordinated funding
- Do case workers know enough/ are they empowered to coordinate services?
- Can we divert more bill assistance \$ to EWR, Wx, RE?
- Roll the health and safety, walk-away (too far gone) issues into the coordination discussion
- Let's get synergies and a continuum of customer and program delivery.

### Who wants to be involved?

- Sarah Mullkoff- MPSC
- Jessica Rick- Habitat for Humanity Michigan
- Thom Phillips- Habitat for Humanity Michigan
- Laura Goldberg- NRDC
- Patrick Leahy- CLEAResult
- Nathalie Osborn- CLEAResult
- Jim Ault- MEGA
- Dave Delind- DTE
- Theresa Schmidt- Consumers Energy
- Sandy Pearson-Habitat for Humanity Michigan
- Gina Kostoff- Indiana & Michigan Power Company
- Amy Glapinski- Consumers Energy
- Ted Ykimoff- Consumers Energy
- Steve Christensen- Decibel Energy
- Shaun Wright-Community Homeworks
- Jen Dennis- SEMCO
- Yvonne Lewis- Consumers Energy
- Brad Banks- MPSC
- Chere Coleman- MCA

## Program Funding Levels

### Barriers:

- Identifying the Sources
- Funding from the utilities will come from the customers
  - Can we reduce surcharges for LI customers?
- Coordinating funding sources

### Opportunities:

- Multiple funding sources
- Matching funding from foundations or grants?
- Voluntary contribution from customers
- Possible sources of funding: USDA, MSHDA, LIHEAP, non-profits, utilities, Wx

### Additional Considerations:

- Does all this info live somewhere together online?
- Let's work on on-bill financing
- Receive funding from the healthcare sector
  - Hospital community benefit
  - Medicaid
- Please consider timing of programs. For example—give letters of commitment early on so people can apply for other programs and know they have resources.
- Funding levels can be unpredictable and not be received timely or at the beginning of each fiscal year.
- Other states have established qualified required levels of low-income spending
- What is the appropriate baseline? Percent of total portfolio? Percent relative to Residential (non-low income)? Dependent upon the population in service territory.
- Are utility LI funding levels in EWR portfolios proportionate to the percentage of low-income customers?

### Who wants to be involved?

- Tammy Bair- DHHS
- Ben Stacey- UM Urban Energy Justice Lab

## Addressing Unique Multifamily Needs

### Deliverables:

- Topics for future Multi-family-focused meeting:
  - Co-delivery by DTE + Consumers (and others)
  - Affordable Housing 101 for utilities and others
- Process mapping for affordable housing lifecycle and refinancing
- Sharing case studies and best practice programs
- Design a financing pilot
- Create clearinghouse program for EE program and EE financing info

### Barriers:

- Complex building and metering arrangements
- Subset of unmotivated landlords/residents in crisis
- Hard to reach correct decisionmaker
- Lack of capital

### Opportunities:

- Better engage MSHDA and owners going through LIHTC
- Better engage HUD and USDA
- Whole-building approach
- Easy financing via on bill, PACE low interest rate loans/Fannie/Freddie
- Solar Rooftops
- Co-delivery
- Water efficiency
- Arrearage targeting

### Additional Considerations:

- Use of housing/ local ordinance code enforcement to motivate landlord upgrades
- Why pilot rather than initial program? Pilot has limited policy/rate protection meanings
- RE could be added to this through tenant/ landlord opportunities for funding/agreement

### Who wants to be involved?

- Annika Brink- NHT
- Tim Skrotzki- Elevate Energy
- Laura Goldberg- NRDC
- Gina Kostoff- Indiana and Michigan Power Company
- Brittany Turner- EcoWorks
- Jamie Schriener-CEDAM
- Julie Cassidy- MLPP
- Amy Glapinski-CE
- Tina Reynolds- MEC

## Health, Safety, Walk-Away Issues

### Deliverables:

- Involve health care industry in EWR group
- Bring 2-3 specific representatives to these meetings
- Program changes on less restrictive services covered

### Barriers:

- Programmatic restrictions
- Specificity of Individual Needs
- Funding Limitations

### Opportunities:

- Comprehensive collaborations
- Data sharing throughout the organization
- Sharing the statewide story
- Automatic qualification of families in cross-sector programs.
  - The more streamlined the better.
  - This might be the biggest, unnecessary barrier
- Unrestricted funds
- Comprehensive and common assessments

### Additional Considerations:

- Liability
- What are the existing restrictions on how each funding source can be spent?
- Integrating other agencies as a program outreach strategy
- How to incentivize utilities to work with agencies focused on health and safety
- Common application
- If you qualify for CA or Habitat, you qualify for the income eligible programs. Have the agency apply to you in place of the family.
- Combine with coordination of programs and streamlining among utilities. This will facilitate more customer usage and connections through the nonprofits and service agencies.
- Separate pot of funds for pest remediation, mold, roofs, Wx eligibility.
- Rethink goal of an EWR measure to address its energy benefit. (Ex. Ventilation benefit in allowing maximizing infiltration seduction.
  - [DCBLNRG@gmail.com](mailto:DCBLNRG@gmail.com)
- Using technology to facilitate data storing. (E.g. One app that all implementers have access to in order to document walk-away issue with photos, description, etc.)
- Get health and safety NEBs included in CE testing

### Who wants to be involved?

- Sandy Pearson-Habitat for Humanity Michigan
- Gina Kostoff- Indiana and Michigan Power Company

- Jen Dennis-SEMCO
- Jessica Rick- Habitat for Humanity Michigan
- Thom Phillips- Habitat for Humanity Michigan
- Shaun Wright- Community Homeworks
- Julie Cassidy- MLPP
- Tina Reynolds- MEC
- Katie T.- MPSC

### **Coordinate Between Gas/Electric Water Utilities**

#### Deliverables:

- Engage water departments

#### Barriers:

- Who gets the credit
- Water municipality participation
- Define what we are coordinating

#### Opportunities:

- Coordinated event/ hub/ resource portal
- Better coordination with water municipality

#### Additional Considerations:

- Opportunities. Trading “credits” for EE impact similar to RECs
- What motivates water utilities? Do we need to change the regulatory framework?
- What are the barriers to DTE and consumers co-delivering? We need MOUs to share implementer costs and co-deliver.
- Co delivering of gas and electric utilities without overlapping territories (i.e. Consumers and DTE)
- Address cost sharing. Who pays for what? Who claims what savings? How to brand programs.
- Combine water affordability and energy affordability efforts
- Group purchasing of measures to provide more for customer
  - Who is the decision maker in this coordination?
  - MPSC does not regulate water
- Can they also share the costs?
- Overlap with behavior change programs

#### Who wants to be involved?

- Jenny Sample- Consumers Energy

## Outreach and Engagement

### Deliverables:

- Key partnership development
- Speakers Bureau/Ambassadors
- Be guided by best practices
- Focus Groups

### Barriers:

- Trust
- Technology
- Identifying audience
  - Key stakeholders other than IQ population develops and manages
- Understand perspective
- Educating and awareness of eligibility
- Eradicating the stigma of IQ
- Addressing EE as a priority

### Opportunities:

- Utilities program design and outreach meets the needs of IQ customer
- Work with existing CAAs and community organizations to reach IQ customers
  - And give them money for doing so
- One stop website for utility program offerings that is mobile friendly and tailored to different audiences.
- Targeted messaging to different segments with low-income community
- Meeting people where they are

### Additional Considerations:

- Reduce repeated burden of income qualification
  - Can DHHS help?
- How can you address MF and SFH homes with this work?
- Energy efficiency workshops that educate different segments of customers about *all* programs available in their community.
- Lack of understanding of the funding process of multifamily affordable housing and how the QAP works
- Bring in other parties to create opportunities to fund issues that create barriers of reasons we walk away from serving homeowner and families.

### Who wants to be involved?

- Jamie Schriener- CEDAM
- Julie Cassidy- MLPP
- Gina Kostoff- Indiana & Michigan Power Company
- Nathalie Osborn- CLEAResult

- Tammy Squires- Cherryland Electric Cooperative
- Lisa Pucelik- WECC/MECA
- Katie T.- MPSC
- Chelsea Stein- Michigan Energy Options
- Carmen Bender- WMES

### **Measuring and Tracking Affordability**

#### Deliverables:

- Study potential of EE and RE to achieve affordability guidance for EWR design,
- Agree on a definition of affordability that is measurable
- Toolkit for utilities, service providers to support individual clients in reaching affordability

#### Barriers:

- Getting reliable data on utility bills vs income, payment history, arrears, and distribution of (un)affordability, eviction, and energy burden
- Time, resources, \$ needed to ensure universal affordability
- Financing for increasing scale of Wx, RE?

#### Opportunities:

- Connections to rate design, existing programs
- Look at other states' models for affordability goals

#### Additional Considerations:

- Energy burden should be considered
- Need of realistic assessment of how regulatory policy is driving up energy costs (particularly electric). Energy poverty can increase dramatically.
- Include housing cost burden as overall measurement
- IQ rates?
- Please insure cost is netted with benefit both those traditionally monetized and those not (health, environment). Also, affordable over what time period? Realizing there are longer payback periods.
- Add reduced energy burden as a non-energy benefit.
- National definition for HUD is 30% income for rent and utilities.
- Whose goal do we want this to be? Utilities? This group?

#### Who wants to be involved?

- Ben Stacey- UM Urban Energy Justice Lab
- Justin Schott- EcoWorks
- Brittany Turner- EcoWorks
- Katie T. -MPSC

|                   |                                    |   |
|-------------------|------------------------------------|---|
| Sarah Mullkoff    | MPSC                               | Coordination between EWR, Wx, and Assistance Programs.  |
| Brad Banks        | MPSC                               | Coordination between EWR, Wx, and Assistance Programs.  |
| Jessica Rick      | Habitat for Humanity Michigan      | Coordination between EWR, Wx, and Assistance Programs,  |
| Thom Philips      | Habitat for Humanity Michigan      | Coordination between EWR, Wx, and Assistance Programs,  |
| Laura Goldberg    | NRDC                               | Coordination between EWR, Wx, and Assistance Programs, Addressing Unique Multifamily Needs  |
| Patrick Lehey     | CLEAResult                         | Coordination between EWR, Wx, and Assistance Programs.  |
| Nathalie Osborn   | CLEAResult                         | Coordination between EWR, Wx, and Assistance Programs, Outreach and Engagement.   |
| Jim Ault          | MEGA                               | Coordination between EWR, Wx, and Assistance Programs.  |
| Dave Delind       | DTE                                | Coordination between EWR, Wx, and Assistance Programs.  |
| Theresa Schmidt   | Consumers Energy                   | Coordination between EWR, Wx, and Assistance Programs.  |
| Amy Glapinski     | Consumers Energy                   | Coordination between EWR, Wx, and Assistance Programs, Addressing Unique Multifamily Needs  |
| Yvonne Lewis      | Consumers Energy                   | Coordination between EWR, Wx, and Assistance Programs.  |
| Gina Kostoff      | Indiana and Michigan Power Company | Coordination between EWR, Wx, and Assistance Programs, Addressing Unique Multifamily Needs, Healthy, Safety, Walk-Away Issues, Outreach and Engagement. |
| Sandy Pearson     | Habitat for Humanity Michigan      | Coordination between EWR, Wx, and Assistance Programs, Healthy, Safety, Walk-Away Issues.   |
| Ted Ykimoff       | Consumers Energy                   | Coordination between EWR, Wx, and Assistance Programs.  |
| Steve Christensen | Decibel Energy                     | Coordination between EWR, Wx, and Assistance Programs.  |
| Shaun Wright      | Community Homeworks                | Coordination between EWR, Wx, and Assistance Programs.  |
| Jen Dennis        | SEMCO                              | Coordination between EWR, Wx, and Assistance Programs.  |



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|-----------------|---------------------------------|--|
| Tammy Bair      | DHHS                            | Program Funding Levels   |
| Ben Stacey      | UM Urban Energy Justice Lab     | Program Funding Levels. Measuring and Tracking Affordability.              |
| Annika Brink    | NHT                             | Addressing Unique Multifamily Needs  |
| Tim Skrotzki    | Elevate Energy                  | Addressing Unique Multifamily Needs  |
| Brittany Turner | EcoWorks                        | Addressing Unique Multifamily Needs, Measuring and Tracking Affordability. |
| Jamie Schriener | CEDAM                           | Addressing Unique Multifamily Needs. Outreach and Engagement.              |
| Julie Cassidy   | MLPP                            | Addressing Unique Multifamily Needs, Outreach and Engagement.              |
| Tina Reynolds   | MEC                             | Addressing Unique Multifamily Needs  |
| Jenny Sample    | Consumers Energy                | Coordinate between Gas/Electric and Water utilities.                       |
| Tammy Squires   | Cherryland Electric Cooperative | Outreach and Engagement,   |
| Lisa Pucelik    | WECC.MECA                       | Outreach and Engagement  |
| Katie Trachsel  | MPSC                            | Outreach and Engagement, Measuring and Tracking Affordability              |
| Justin Schott   | EcoWorks                        | Measuring and Tracking Affordability                                       |