

# Energy Affordability & Accessibility Collaborative

June 16, 2021

## Agenda Items

10:00 5 min	Welcome/Agenda Review	Anne Armstrong - MPSC
10:05 15 min	Guiding Values	Briana Parker - Elevate
10:20 15 min	Self Sufficiency Definition Presentation	Kristen Bolds – St. Vincent de Paul
10:35 5 min	Survey #1	
10:40 40 min	Energy Affordability Standards Panel	<p>Moderator: Monica Martinez Coalition to Keep Michigan Warm</p> <p>Panelists:</p> <ul style="list-style-type: none"> <li>• Aimee Gendusa-English – National Community Action Partnership</li> <li>• Bethany Stutzman – United Way Jackson</li> <li>• Shama Mounzer – Wayne Metro Community Action Agency</li> <li>• Roger Colton – Fisher, Sheehan, and Colton</li> </ul>
11:20 20 min	Elements of an Energy Affordability Standard Group Discussion	Monica Martinez Coalition to Keep Michigan Warm
11:40 5 min	Survey #2	
11:45 10 min	Collaborative Structure Subcommittee Roll-out	Anne Armstrong - MPSC
11:55 5 min	Next Steps	Anne Armstrong - MPSC
12:00	Adjourn	

# 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.

Priorities stated in the order are:

- Ongoing COVID-19 response
- Affordable Energy Bills: Explore the adoption of a common definition of energy affordability and energy self-sufficiency with the goal of reducing the number of households in Michigan with unsustainable energy burdens
- Simplifying the energy assistance/energy waste reduction (EWR) application and eligibility process
- Affordable payment plans (APPs)
- Structures for EWR and energy assistance linkages
- Data collection, transparency, and analysis
- Review of rule-based protections
- Communication and engagement

# MPSC Expectations

The foundation of this work group is to create an environment where broad and varied input is made possible to provide guidance to the Commission in making formal policy decisions on energy affordability and accessibility. Staff is committed to achieving consensus when possible. Staff is ultimately responsible for making final recommendations including accurately reflecting participant input and writing reports based on the group discussion.

# Guiding Values

Briana Parker – Elevate

# Breakout Group Assignments

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

# Self-Sufficiency Definition

Kristen Bolds – St. Vincent de Paul

# Getting to a Definition for Self-sufficiency

Presentation of the work of MEAP Workgroup  
Monitoring and Evaluation Subcommittee

# History

- Born out of the MEAP Workgroup Monitoring and Evaluation subcommittee.
- Tasks:
  - Examine data points, data collection methods, and reporting strategies to find the most suitable strategy to evaluate MEAP's long-term effectiveness.
  - Develop a Logic Model for MEAP evaluation
- Sample guiding questions
  - How do we measure success?
  - What key evaluation questions should we be asking?
  - How many households are achieving self-sufficiency as a result of MEAP interventions

# History

During the subcommittee's first formal meeting a few things became evident....

We cannot evaluate/measure a “thing” that can't be defined!

- Each stakeholder seemed to be using varying definitions of “self-sufficiency”.
- We decided to survey various MEAP grantees and utility companies to determine the disparity among how we defined self-sufficiency.
- We researched how self-sufficiency had been viewed through the lens of the MEAP RFP, and LIHEAP.
- Decided to present “options” to the workgroup for a vote.

# Some Feedback We Received

- Will the vote be binding definition? Or one used for functional purposes?
- How will a definition impact all stakeholders (especially ones that may define self-sufficiency significantly differently?)
- 64% of grantee and utility company survey respondents indicated that self-sufficiency should be defined broadly, while 36% indicated that the definition should be limited to energy self-sufficiency.
- However, when we analyzed the collected pros and cons provided by each responded for each, there was great concern related to the ability to execute on the requirements of implementing, collecting data for, tracking and measuring success for a program focused on broader, long-term self sufficiency.
- Sentiment: “self-sufficiency is very complex”!!!

# Broad vs. Focused Definition

Broad, Comprehensive Self-sufficiency Definition	Limited Energy Self-Sufficiency Definition
<p>Pros:</p> <ul style="list-style-type: none"><li>• Provides a holistic viewpoint (6)</li><li>• Allows us to address needs outside of utilities (2)</li><li>• Leverages grantees' internal resources</li><li>• Demonstrates the full "value" of the MEAP program</li><li>• Financial independence</li></ul>	<p>Pros:</p> <ul style="list-style-type: none"><li>• Easier to standardize metrics (8)</li><li>• More realistic goal (2)</li><li>• Less subjectivity</li><li>• Fewer, and more manageable resources required</li><li>• Allows for "flexibility" in providing other self-sufficiency services</li></ul>
<p>Cons:</p> <ul style="list-style-type: none"><li>• Requires more time and resources to implement and measure (8)</li><li>• May be more difficult to gain statewide grantee buy-in (3)</li><li>• Makes the scope of work too broad (3)</li><li>• May lose support of utilities</li><li>• Lack of existing best practices; heavy lift</li><li>• Complex data interpretation</li></ul>	<p>Cons:</p> <ul style="list-style-type: none"><li>• May be too limiting in focus (3)</li><li>• Oversimplifies the issue (2)</li></ul>

# MEAP Grantee Survey Definitions

Common self-sufficiency definition themes across GRANTEES:

- Reduced energy burden and/or reduced need for energy assistance (5 respondents)
- Having enough resources to sustain household needs without public assistance (4 respondents)
- Meeting basic needs while decreasing the need to rely on public assistance (3 respondents)
- Customer achieving their individual goals (2 respondents)-*specific to person-centered planning/goal-setting tools used by some organizations*

# MEAP RFP Definition

The purpose of this Request for Proposals (RFP) is to obtain proposals from public or private entities or local units of government that will outline plans to: assist in the resolution of energy crisis situations and work with eligible households to develop a self-sufficiency plan that will enable participants to become or move toward becoming **self-sufficient**. A self-sufficiency plan includes assisting participants with the following: **paying their energy bills on time; budgeting for and contributing to their ability to provide for energy expenses, which includes enrollment in a utility affordable payment plan (APP) if the household meets enrollment eligibility criteria; and utilizing energy services to optimize on energy efficiency.**

# U.S Dept. of Health and Human Services – LIHEAP Definition

“Assurance 16 provides funding to assist grantees in **helping clients attain energy self-sufficiency.**

(It) is intended to **develop information and energy education materials to LIHEAP clients over and extended period of time.** It can include:

- providing resources to clients to aid them in communicating more effectively with energy vendors in order to maintain services,
- Providing information on reducing energy usage and obtaining energy efficiency services, and
- Working with clients to improve financial management skills that help clients proactively manage energy bills.”

*“Provide services that **encourage or enable households to reduce energy needs, thereby the need for energy assistance...**”*

- Sources: <https://liheapch.acf.hhs.gov/delivery/sufficiency.htm>; <https://liheapch.acf.hhs.gov/docs/A16.pdf>

# Next...

We examined common themes that exist across viewpoints and proposed the following three simplified definitions for a Workgroup vote:

- A. The household's basic needs are being met while the reliance on public assistance is decreasing.
- B. Clients are achieving individual goals.
- C. The household's basic needs are being met while the reliance on public assistance is decreasing and the client is achieving individual goals.

# The Vote

Self-sufficiency:

“Household’s basic needs are being met while minimizing reliance on public assistance.”

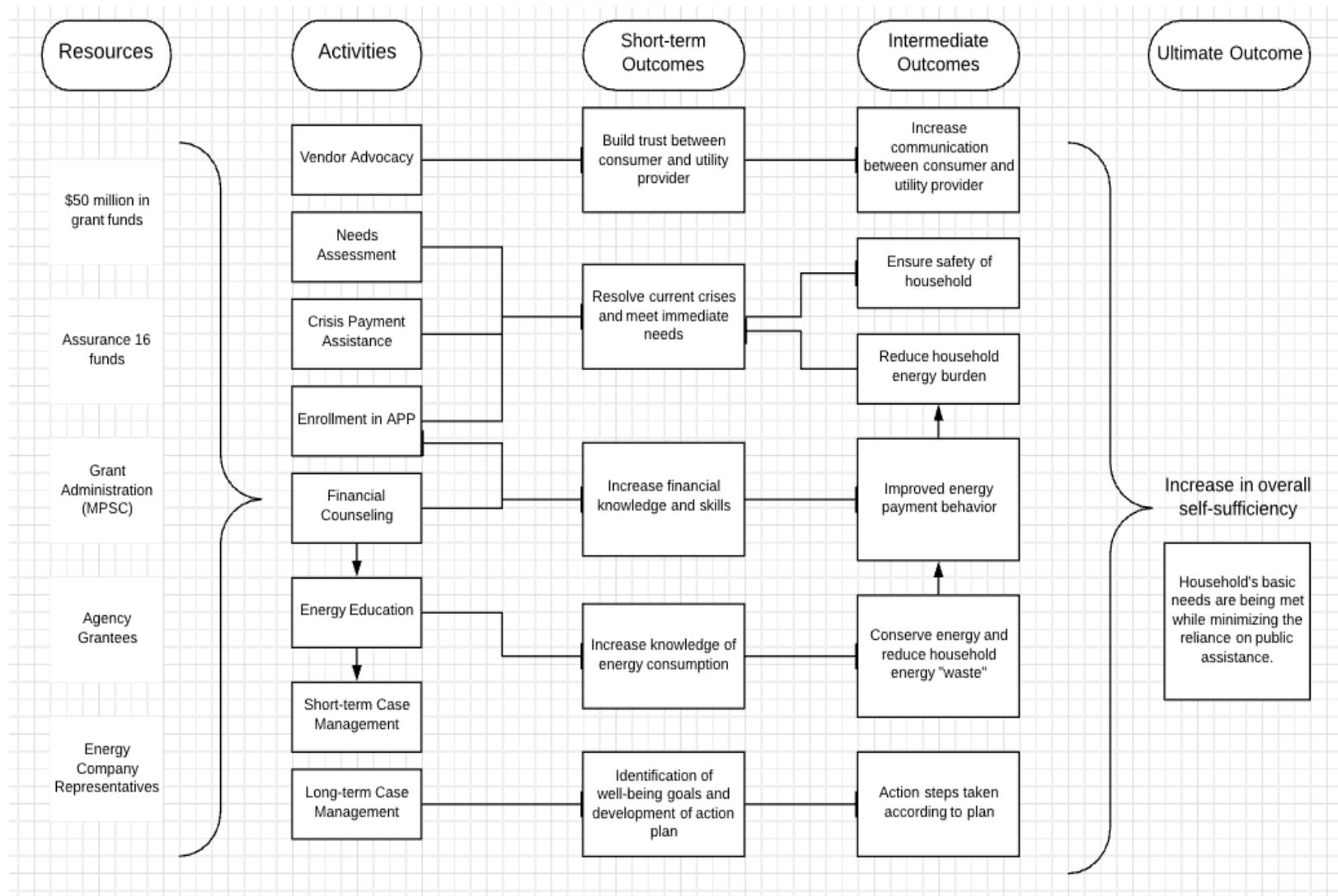
# What We learned

- No common themes found with regard to how success is measured for “self-sufficiency”.
- Some grantees defined success as an individual metric obtained after a specific intervention (graduating from an APP, decreased need for utility assistance or job attainment)
- Some grantees used growth on the Arizona Self-Sufficiency Scale or Financial Well-Being Scale.
- Ironically, no grantees mentioned “energy burden” as a potential measure of success.
- There was much work to do to find common success metrics for self-sufficiency.

# How We Managed

- Focused on activities and metrics that would lead to short- and interim outcomes aimed at energy self-sufficiency. (Within our control)
- Broader self-sufficiency definition being the more long-term “aspiration”.

# Example



# Questions



# Survey #1

- See link in chat
- Results posted on screen and in link in chat

# Energy Affordability Standards Panel

Moderator: Monica Martinez - Coalition to Keep Michigan Warm

Panelists:

- Aimee Gendusa-English – National Community Action Partnership
- Bethany Stutzman – United Way Jackson
- Shama Mounzer – Wayne Metropolitan Community Action Agency
- Roger Colton – Fisher, Sheehan and Colton

# Elements of an Energy Affordability Standard Group Discussion

Monica Martinez, Coalition to Keep Michigan Warm

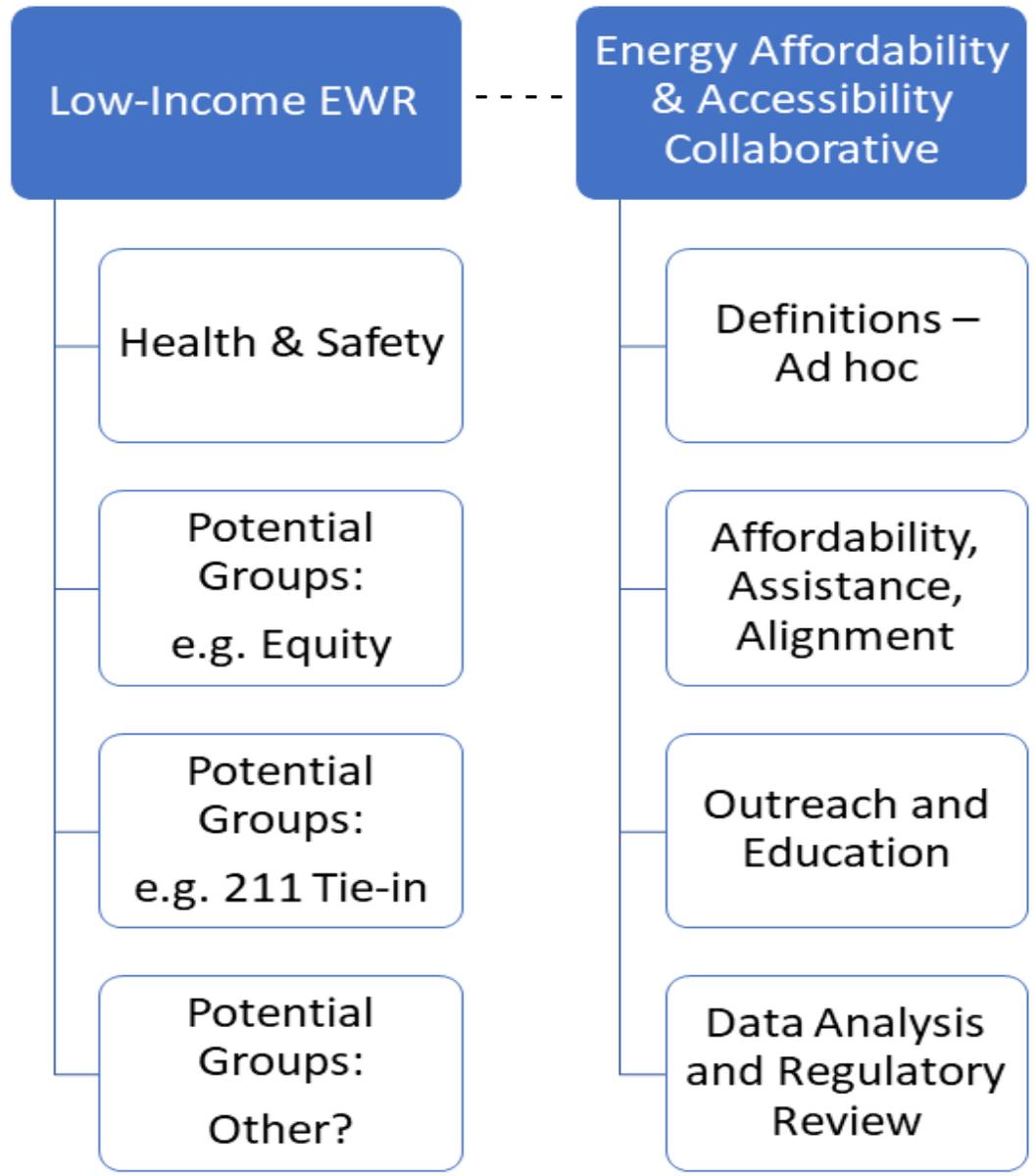
# Survey #2

- See link in chat
- Results posted on screen and in link in chat

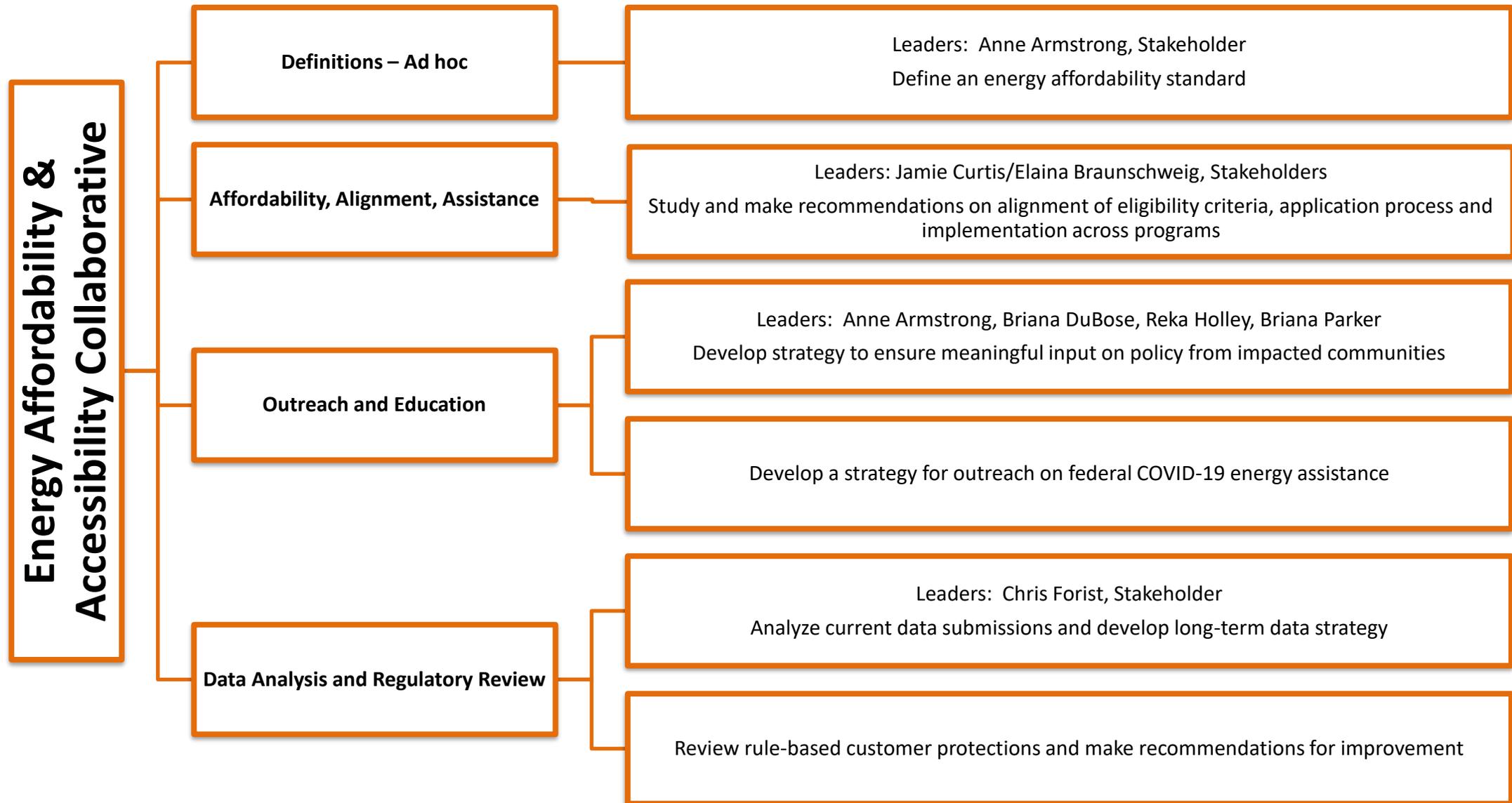
# Collaborative Structure Subcommittee Roll-out

Anne Armstrong - MPSC

# EAAC Structure



# EAAC Subcommittee Structure



# Next Steps

- EAAC Meetings are the 3rd Wednesday of the month.
- Next Meeting: July 21, 2021, 10:00 a.m. to 12:00 p.m.
  - Walk through MPSC shutoff/arrearage data site
  - Update on federal energy assistance programs
- August 18 meeting will feature Commissioner Phillips
- Please consider participating in a subcommittee. Sign up through this link:
  - [Energy Affordability and Accessibility Collaborative Subgroup Sign-up \(office.com\)](#)
- [EAAC Website](#)

# Thank You for Participating

Anne Armstrong – [armstronga3@michigan.gov](mailto:armstronga3@michigan.gov)



# Kristen Bolds, Director

## Energy Assistance Programs at St. Vincent de Paul

Kristen has over 15 years of experience as a non-profit professional leading programs aimed at providing basic needs and self-sufficiency services. Her experience includes leading teams in collaborating to bring life to ideas for solving social problems by designing user-centered solutions, and by taking them from concept through to execution. She has been working in the utility assistance space since 2013. She presented some of her work at NEUAC in a presentation “Teaming Up to Provide Self-Sufficiency Services for Low-Income Customers” in 2016.

Kristen is a former director of 2-1-1, United Way for Southeastern Michigan and is the current director of Energy Assistance Programs at St. Vincent de Paul.

- [LinkedIn](#)

# Monica Martinez

## Coalition to Keep Michigan Warm

Ms. Martinez serves as principal of Ruben Strategy Group LLC. With Ruben Strategy, she works with major national associations, non-profits, coalitions, and businesses to help develop their markets, create strategic pathways to solutions, and empower their organizations. She specializes in limited income energy solutions, the utility of the future, and workforce development engagement. Monica served in key positions in state government - former Michigan Public Service Commissioner, Deputy Director for Legislative Affairs for the office of the Governor, and as Senior Policy Advisor in the Michigan Senate. In those capacities she helped formulate and implement Michigan's first renewable energy standard and Michigan's first fund designed for low-income energy customers.

[LINKED IN](#)

# Roger Colton, Principal Fisher Sheehan & Colton

Roger Colton directs FSC's work in the firm's Boston office. Roger is an attorney and economist and specializes in regulatory economics, community planning, affordable housing, consumer protection, poverty economics, and fair housing. He is best known for providing assistance in the design, implementation and evaluation of cutting-edge poverty programs. Roger obtained his law degree from the University of Florida and his graduate economics degree from Antioch University.

[RESUME](#)

# Aimee Gendusa-English, Project Director National Community Action Partnership

Aimee is a project director for The Energy Partnerships Project. She is an experienced and dedicated advocate, speaker, trainer and advisor for any gas, electric or phone related concern, in particular those affecting at-risk populations.

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# Shama Mounzer, Executive Director Wayne Metropolitan Community Action Agency

At the WMCAA, Shama is responsible for strategic leadership and operational oversight of integration and is focused on promoting mission and increasing effectiveness of key programs to service low-income families in Wayne County. She is consistently designing, leading and implementing social services programs to eliminate poverty and empowering communities to be strong, healthy and thriving. She envisions communities where all people have hope and opportunities to realize their full potential.

# Bethany Stutzman, Community Solutions Director United Way Jackson

Bethany has over 17 years of experience with United Way of Jackson County. This includes managing the MEAP grant; system change advocacy; collaboration and program planning; community development; delivering trainings on topics such as outcome development and Collective Impact; and program evaluation.