

Meeting Essential Needs: The Results of a National Search for Exemplary
Utility-Funded Low-Income Energy Efficiency Programs

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Common traits of leading programs include:

1. Partnerships and multi-party collaboratives formed to leverage funding from multiple sources and to increase effectiveness and efficiency of program design.
2. Services are provided through Community Action Agencies.
3. Services are coordinated through a single provider; ie one-stop shopping.
4. Sophisticated analytical and diagnostic tools are used to make recommendations and prioritize investments.
5. Whole-house approach is used, rather than investments being made in isolation.
6. Customer education is an important part of the program.
7. Programs are fuel-blind.
8. Third-party evaluations are routine.
9. Programs use innovative outreach, and serve customers outside of the traditional 'low-income' categories.
10. Programs address all housing types.
11. A broad range of investments are considered.
12. Cost-effectiveness is not the major objective.

- National Grid, New England – electric – partnership with Community Action Agencies (CAA) to provide in-home education. Funded by System Benefit Charge (SBC)
- Efficiency Vermont – fuel-blind - 'Low-Income Single Family Service' program formed to provide consistent services statewide. Funded by SBC.
- National Fuel (NF) – Pennsylvania – natural gas - Low-Income Usage Reduction Program requires all utilities to offer programs to low-income customers. NF's program targets high-use customers with arrearages, < 200% FPG. Coordinates analysis of household needs and delivery of services. Funded at 0.4% of NF gross revenues. Not clear whether funds come from SH or ratepayers.
- Golden Valley Electric Association – Alaska - electric – Audit and education programs. Program reviewed approximately every six months so that beneficial changes can be identified and implemented. Provides flexible scheduling for appointments for in-home education with goal of reaching all family members. Program materials cover all home energy usage, not just electric. Program targets high-use customers. Funded by co-op members.

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- New York State Energy Research and Development Authority (NYSERDA) – New York – ‘Assisted Multi-Family Building Program.’ Technical & financial services provided to building owners and managers. Some investments financed by New York Energy SmartSM loan, lower interest loans offered through conventional lenders, with energy savings used to finance debt. Funded by SBC.
- Low-Income Affordability Network – Massachusetts – electric and gas. Provides comprehensive coordination services for program delivery. Special efforts to reach new construction and comprehensive rehab projects. Efficiency services provided in conjunction with services like budget counseling, arrearage management, etc. Flexible program design and implementation. Coordinates standardization of individual utility programs. Funded by shareholders and ratepayers.
- Cinergy/PSI – Indiana – electric. Sliding-scale payment system for investment (refrigerators). Developed partnership with Whirlpool which enabled large-volume purchase at good price. Not clear whether this is shareholder or ratepayer funded.
- TXU Electric Delivery – Texas – electric. Provides ‘market-based’ approach to providing energy efficiency/low-income weatherization. Energy efficiency service companies apply for inclusion in program. <200 FPG. Funded by ratepayers.
- Focus on Energy – Wisconsin – Targeted Home Performance with ENERGY STAR. Provides weatherization services to households between 150% - 200% FPG. 10% co-pay. Primarily delivered through existing network of weatherization providers. Landlords are eligible - pay an ‘energy assessment fee’ of \$150 + 10% of improvements. Participants must allow all energy efficiency investments identified in assessment to be installed – can’t pick and choose. Funded through Public Benefits Charge.
- CenterPoint Energy Minnegasco – Minnesota – gas. Non-Profit Affordable Housing Project. Works with non-profit agencies, such as Habitat for Humanity, to create affordable housing. Provides incremental cost difference between standard and high-efficiency equipment. Program funded through rates.