

# Structure and Organizing Principles for Low Income Energy Efficiency Workgroup

## Background

As part of Post-2011-Review, BPA agreed to convene a low income energy efficiency workgroup. The structure was largely undefined by the Post-2011 Review workgroup's (Workgroup 3) recommendation leaving BPA to take the initiative to move this forward. BPA has agreed to convene meetings quarterly. The workgroup provided a list of challenges and opportunities to serve as a starting point (See excerpt from *Workgroup 3 Recommendations* below).

**Mission:** The Northwest Public Power Regional Low-income Energy Efficiency Work Group aims to share information and develop best practices in order to increase low income residents' access to and uptake of energy efficiency services across the Northwest.

## Objectives

- Provide venue for utilities, advocates, and other organizations to come together.
- Increase knowledge of CAP and utility business activities.
- Find simple solutions to streamlining reporting between organizations (CAPs, utilities)
- Identify barriers and solutions to increasing low income access to EE programs.

## Structure

Facilitator: Summer Goodwin, BPA EE

Back-up facilitator: Boyd Wilson, BPA EER

Other BPA staff to be involved: Sarah Moore, Carrie Nelson, Josh Warner, Brent Barclay, Courtney Dale (weatherization contractor)

**Who is invited?** All BPA-served public utilities in the region, low income advocacy groups, community action partnerships (CAPs), Tribal governments, state energy offices and other interested parties are invited. There is an "open door" policy.

## Who will facilitate?

BPA will provide a facilitator. A steering team will provide guidance as requested by BPA.

## When and where will the group meet?

It is advantageous to hold meeting in a location that is central or move it around the region. It may piggy back on other meetings or conferences that are happening that members may be attending so as to reduce travel costs.

**Duration?** BPA commits to convening this group for one year. If after some experience has been gained (2 or 3 meetings), it is determined that BPA cannot perform this function or the

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scope is too broad for the workgroup to function effectively and efficiently, BPA may decide to discontinue convening or adjust the scope.

### **What resources will BPA contribute?**

- Facilitator and coordinator staff time
- Meeting preparation pre and post
- Access to meeting space
- Communication to workgroup and other potential workgroup members
- Report out to BPA EE, customers and other interested parties
- Provide some staff time for research and analysis of low income energy efficiency measures, grants, or other relevant program activity.
- Periodically share progress with utilities and stakeholders at roundtables, brown bags, etc. Some liaising with state agencies and public interest groups.

### **Steering Committee**

Doesn't need to be based on a formula, but should be balanced (utility/non-utility)

1. Todd Blackman, Franklin PUD
2. Margaret Ryan, PNGC
3. Van Ashton, IDEA GROUP
4. Chuck Ebert, The Energy Project -
5. Steve Jole, HACSA
6. Michael Furze, Washington Department of Commerce

**Responsibilities of Steering Committee Members:** Steering Committee convenes for one meeting prior to each workgroup meeting to confirm that the agenda looks good and one meeting after each workgroup meeting to tie up loose ends. Estimate 12 meetings in the year. This is a guiding role. Steering team members are asked to provide feedback to facilitator if workgroup is veering off course.

### **Excerpts from Historical Documents**

#### **Workgroup 3 Recommendations**

Recommendation #1, BPA Adopt a Low-Income Energy Efficiency Guiding Principle

The Preamble

- Financial constraints limit low-income ratepayers' participation in traditional incentive-based programs.

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- There are a large number of low income households throughout BPA service territory that could benefit from energy efficiency and conservations measures.
- Existing sources of funding, including state and federal resources, are insufficient to meet current needs.
- The high number of funding sources used for this work and the number of entities involved complicates effective and efficient program implementation and reporting.
- Current efforts sometimes lack coordination and could benefit from improved communication.
- Management and administration of programs usually works best when there is involvement at the local level — from the utility and low income agencies.
- One single solution will not work in every electric service territory and for every utility. Therefore, recommended actions are developed with a variety of options to choose from in order to ensure management and administration remains at the local level.

The Principle: BPA customer utilities should provide equitable access to energy efficiency services tailored for low-income customers funded through utility self-funding and/or BPA incentive dollars.

The rationale for this recommendation is to set a common framework for future work and action. The principle grew out of the concern of some stakeholders that BPA and its customer utilities lacked an adequate commitment, given the need, to low income energy efficiency. Once it was agreed to the development of a principle a sub-committee was formed and task with bring a proposal to the entire group. The sub-committee completed its task on time and presented the proposed preamble and principle to the entire workgroup. There was lengthy give and take on behalf of the all Participants and the workgroup was able to reach consensus on the both the Preamble and Principle.

Recommendation #2, Ongoing Workgroup for Low Income  
BPA reconstitute a workgroup to meet quarterly on Low Income Energy Efficiency (LIEE) in its service area to address some of the topics identified by this group, such as:

- Small utilities path to do low income work.
- Data streamlining. More comprehensive tracking system meeting requirements from U.S. DOE and BPA's Implementation Manual.
- Best practices and improved communication, coordination and collaboration:
  - Guidelines for structuring an agreement including CAP administrative costs
  - Approaches for cost control
- Align so the measures line up (US DOE requirements / Utility requirements in the IM). There are misaligned and have some conflicting requirements.
- Understand BPA's role in facilitating access to LIEE across its service territory.
- Training.
- Other topics that the workgroup may choose.

The rationale is that this was the first time in many years, if ever, that this type of Workgroup has been convened. Although we made great progress, we did not have time to develop solutions for the core issues in these meetings over 90 days. In this recommendation #2, the Workgroup asks that the dialogue continue on these important topics.

Recommendation #3, Turnkey Implementation for Low Income Programs

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BPA facilitates a method or process that would allow utilities to designate some of their EEI or other utility funds for implementation of LIEE, where BPA is the administrator of the funds.

A number of Utilities that served on this Workgroup already provide funds to their local CAP Agency to install Low Income measures that meet the specifications in the I.M. Some of the smaller Utilities may not have a CAP Agency, may not do business with the local CAP Agency even if there is one in their service area, or may not have the time, staff, or expertise to do Low Income programs. The Utilities are looking to BPA for assistance in this area. BPA provided guidance that it cannot transfer EEI funds to CAP Agencies because BPA does not have an Energy Conservation Agreement (ECA) with the CAPs. The smaller Utilities have asked BPA for additional help from BPA. It is recommended that BPA spend time to determine if and how best this could work best for the Utilities, the CAPs, other Stakeholders, and BPA.