Survey Conducted by VEIC of

New Hampshire Community Actions Agencies Regarding

Administration and Implementation of the NH Home Energy Assistance Program

February 2020

****

RESPONSE #1

1. **What are the top three (3) ways in which the current administration and implementation of the HEA program is working well in NH and for your CAA specifically?**
    - -They are managing the program competently for the needs of our CAA.
    - -Funding is released in a reasonable time and the ability to have fast turn-around on invoices is critical.
    - -Case by case exceptions are reviewed as needed, which is very beneficial for our clients.
    - -The ability replace heating systems through HEA is essential to our CAA.

2. **What are the top three (3) challenges facing the successful administration and implementation of the HEA program moving forward in NH and for your CAA specifically?**
    - They are managing the program competently for the needs of our CAA.
    - The HEA Program is an invaluable partner for our CAA- without that support we would not be able to provide the level of service to our clients that we are currently able to.

3. **Recognizing that NHSaves is a statewide brand (but not a statewide delivery mechanism) and that each of the four NH utilities administers HEA separately for its customers, is there consistency in program delivery across the four utilities?**
    - We don't experience any difficulties in how each utility administers the HEA Program. The differences are negligible and do not impact our program delivery.

4. **What information does your CAA receive about the annual budget for the HEA program you will be delivering? Does the information you receive enable your agency to plan accordingly for staffing levels, workforce development, and other key program elements for the year?**

    a. **If not, what changes would improve your agency's ability to budget and plan for your HEA responsibilities for a given year?**
        - It would be helpful to have production goals available earlier in the year so we can plan accordingly for staffing, etc.

5. **The 17-136 Docket indicates that each CAA will receive "right of first refusal" for all HEA-funded projects. Is that occurring?**
    - Yes. And it is an extremely important factor in our ability to best serve our clients in our catchment area.

a. **If not, what changes would achieve "right of first refusal" effectively?**

6. **The 17-136 Docket (Section 2, page 57) describes an approach to delivering HEA with certain roles identified for the "lead utility." Is the "lead utility" process working effectively for your CAA?**
   - N/A

   a. **If not, what changes would achieve the "lead utility" approach effectively?**

7. **Under current HEA delivery, how does your CAA handle "no heat" situations and heating system replacements?**
   - Per State Guideline, Policies and Procedures we are compliant and don't have an issue being compliant.

   a. **Is this approach resulting in customers being assured of having heat, including in emergencies?**
   - Yes. We are very effective at responding to emergencies within 24 hrs or sooner.

   b. **If not, what changes would ensure customers do have heat, including in emergencies?**

8. **Please offer any other suggestions for ways to continue to improve the administration and delivery of HEA to NH utility customers.**
   - We feel the utilities are doing a fine job in managing the program for the needs of our CAA and our clients.

****

RESPONSE #2

1. **What are the top three (3) ways in which the current administration and implementation of the HEA program is working well in NH and for your CAA specifically?**
   - The current administration does an outstanding job of compiling and extracting data to present the programs performance to the PUC.
   - The current administration has been very proactive in seeking ways to leverage resources with other programs within the state. For example, the addition of allowing heating system replacements has been crucial in helping low income stay in their homes and maintain a safe living environment. There are limited funds available for this much needed service which must take place prior to weatherization. The utilities recognized this unmet need and have incorporated replacement heating systems into the program.
   - The current administration has a very strong understanding of technology and has developed a database which allows CAA's to invoice the utilities while also meeting the requirement of a Department of Energy Approved Energy Audit. This creates efficiencies within a program that not long ago was using double entry on every job. The current administration is working with the CAA's and State OSI to ensure any changes to this system maintain current efficiencies.

2. **What are the top three (3) challenges facing the successful administration and implementation of the HEA program moving forward in NH and for your CAA specifically?**
    - There is an inconsistency amongst delivery of services and required B/C within the utilities.
    - The current workforce is one of our largest concerns. We need more HVAC tech's, weatherization installers, electricians and auditors.
    - The uncertainty of an actual budget and knowing if they money will be there for the jobs in progress. There is also a concern of funding being moved to another territory or assigned to a consultant without CAA being aware.

3. **Recognizing that NHSaves is a statewide brand (but not a statewide delivery mechanism) and that each of the four NH utilities administers HEA separately for its customers, is there consistency in program delivery across the four utilities?**
    - No and this is one of our largest concerns.

    a. **If there is not consistency, what are ways in which consistency could be achieved and would such consistency improve program delivery for your CAA and for the utility's customers?**
    - How heating systems are addressed (IE standalone, what to do when Energy star isn't available)
    - The ability to pay for training
    - The CAA right of first refusal on low income work
    - The ability to move a job from gas to electric or electric to gas when either is out of budget (Lead utility)
    - Requirement for a high B/C with some utilities or jobs
    - Different invoicing procedures

4. **What information does your CAA receive about the annual budget for the HEA program you will be delivering? Does the information you receive enable your agency to plan accordingly for staffing levels, workforce development, and other key program elements for the year?**
    - Some utilities give an estimated count of the number of houses we can weatherize for our county while others will give us an estimated dollar amount with a goal of the number of houses we weatherize or the savings we need to achieve. All budgets are based on reimbursement and we need to be ready for that figure to be adjusted throughout the year as another territory spends more/less or if a high savings multi comes up and the utility wants to push for the multi.

    a. **If not, what changes would improve your agency's ability to budget and plan for your HEA responsibilities for a given year?**
    - Ultimately it would be nice to receive a budget amount and know we have that figure to work off for the entire year. If B/C doesn't have to achieve a 1 or greater in low income then we should push for complete/deep weatherization in these homes. For low income families taking the time away from work for audits, retrofits, and inspections can be extremely difficult so the less visits the better. Focusing on the highest savings for the least amount of money can leave some homes with unmet needs and now almost impossible to achieve an overall SIR of 1 or greater which removes them from the ability to have that work performed with federal funds too.

5. **The 17-136 Docket indicates that each CAA will receive "right of first refusal" for all HEA-funded projects. Is that occurring?**
    - For the most part we only see this become an issue around multifamily work. When a for profit consultant finds a low income multifamily they will pass it through the CAA however sometimes the utility will contract with the consultant as opposed to working through the CAA thus reducing the CAA low income budget for that territory. There are times when CAA's need to hold back on a multifamily job **as it would exhaust their budget completely leaving them no avenue to deal with customers who call with no heat issues in emergency situations.**

    a. **If not, what changes would achieve "right of first refusal" effectively?**
    - If the utility is approached with a low income multi they should contact the CAA. There needs to be an understanding on how to handle this when it can leave a budget shorthanded or close off a territory for the year.

6. **The 17-136 Docket (Section 2, page 57) describes an approach to delivering HEA with certain roles identified for the "lead utility." Is the "lead utility" process working effectively for your CAA?**
    - No this isn't working well for our CAA

    a. **If not, what changes would achieve the "lead utility" approach effectively?**
    - If the customer is funded by both gas and electric then we should be able to move that job to the other utility, if the primary heat utility cannot pay for it out of the low income budget. Last year was very problematic when we had money left to spend with one utility but were overspent with primary heat utility yet the primary heat utility would not release the jobs to the other utility.

7. **Under current HEA delivery, how does your CAA handle "no heat" situations and heating system replacements?**
    - We do our best to fund heating replacements with non NHSAVES money however no heats continue to be a huge burden on our clients and often we have exhausted all other funds and are forced to look to utilities to help. Our clients are extremely lucky to have the utilities able to assist in this area but the delivery by each utility is different making it difficult on auditors to know whether or not they can assist.

****

RESPONSE #3

1. **What are the top three (3) ways in which the current administration and implementation of the HEA program is working well in NH and for your CAA specifically?**
    - The program is effectively managed by highly competent staff who have technical understanding of energy efficiency work but who also have a thorough understanding of the individual needs of the CAA's.
    - The HEA program managers effectively balance the needs of the program with program goals and objectives.
    - The OTTER platform, though antiquated, is effectively managed with good turnaround times.

2. **What are the top three (3) challenges facing the successful administration and implementation of the HEA program moving forward in NH and for your CAA specifically?**
    - The number one challenge is the capacity in the field to handle increased program production.
    - With the increased production expectations, the HEA program should seriously consider expanded funding of incidental repair measures in order to capture those sites that have needs that might cause their project BC to be too low.
    - Blind budgeting has shown the need for better communication with CAA's regarding budget figures as opposed to converting those figures into unit completions. This method of budget management contributed to the HEA program falling short of its goals in 2018.

3. **Recognizing that NH Saves is a statewide brand (but not a statewide delivery mechanism) and that each of the four NH utilities administers HEA separately for its customers, is there consistency in program delivery across the four utilities?**
    - Eversource is our main utility with Unitil as a secondary and NHEC providing a few completions annually. Except for being BC (benefit/cost) sensitive, Unitil follows guidelines established by Eversource.

    - **If there is not consistency, what are ways in which consistency could be achieved and would such consistency improve program delivery for your CAA and for the utility's customers?**
    - N/A

4. **What information does your CAA receive about the annual budget for the HEA program you will be delivering? Does the information you receive enable your agency to plan accordingly for staffing levels, workforce development, and other key program elements for the year?**
    - Question 2, Bullet 3

    - **If not, what changes would improve your agency's ability to budget and plan for your HEA responsibilities for a given year?**

5. **The 17-136 Docket indicates that each CAA will receive "right of first refusal" for all HEA-funded projects. Is that occurring?**
    - Yes

    - **If not, what changes would achieve "right of first refusal" effectively?**

6. **The 17-136 Docket (Section 2, page 57) describes an approach to delivering HEA with certain roles identified for the "lead utility." Is the "lead utility" process working effectively for your CAA?**
    - Most of our work is through Eversource and yes, the process is working fine. Frank Melanson works very well with our staff and contractors while being sensitive to the needs of Unitil on dual utility projects.

    - **If not, what changes would achieve the "lead utility" approach effectively?**

7. **Under current HEA delivery, how does your CAA handle "no heat" situations and heating system replacements?**

- No heat calls are handled with a shorter timeline than weatherization retrofits. We typically return a call within 1 hour and will send a licensed HVAC technician to the site same day. During colder weather conditions these jobs take priority, they also give us an opportunity to perform a site visit and look for energy efficiency opportunities. In the past the jobs were predominately funded through the HRRP program, however over the past twelve months we have relied more on the HEA program to fund these replacements. We currently look at all no heat calls as a potential weatherization package that can be funded by HEA along with leveraging from other sources.

a. **Is this approach resulting in customers being assured of having heat, including in emergencies?**
Yes

- **If not, what changes would ensure customers do have heat, including in emergencies?**

8. **Please offer any other suggestions for ways to continue to improve the administration and delivery of HEA to NH utility customers.**
    - A check itemization listing the batch and WO #'s would be helpful when sending payments to CAA's
    - A monthly or even a quarterly itemization listing payment to the CAA along with the batch and WO #'s would greatly assist our fiscal department.

****

RESPONSE #4

1. **What are the top three (3) ways in which the current administration and implementation of the HEA program is working well in NH and for your CAA specifically?**
    - Utility program managers understand our limitations and work with us to help achieve goals and serve clients in need
    - Utilities are very open to funding training events which is very helpful
    - Utilities want CAA's to succeed in reaching as many clients as possible
        - (however it seems from the outside perspective that the PUC may stand in the way of some of the assistance the utilities would like to provide)

2. **What are the top three (3) challenges facing the successful administration and implementation of the HEA program moving forward in NH and for your CAA specifically?**
    - Budget ramp-up happening too quickly to keep up with production demand
    - Limited qualified workforce in NH
    - Obtaining funding for vehicles and staffing ramp-ups

3. **Recognizing that NHSaves is a statewide brand (but not a statewide delivery mechanism) and that each of the four NH utilities administers HEA separately for its customers, is there consistency in program delivery across the four utilities?**
    - There are some inconsistencies:
        - Some fund measures that others are not open to funding
        - Some take longer to pay invoices, or hold invoices due to internal budgeting issues
        - Some are not as communicative, or take excessive time to respond to inquiries

- Some want us to hit aggressive production goals, but are not open to funding certain measures or projects that may be necessary to complete the entire project

a. If there is not consistency, what are ways in which consistency could be achieved and would such consistency improve program delivery for your CAA and for the utility's customers?

- Utilities could collectively come up with accessible written guidelines, available to the CAA's for reference.

4. What information does your CAA receive about the annual budget for the HEA program you will be delivering? Does the information you receive enable your agency to plan accordingly for staffing levels, workforce development, and other key program elements for the year?

- We receive general production goals for each utility, but have not received any for 2020 as of yet.
- We have a limited workforce, so staffing can be a big issue if we do not have the capital to invest

b. If not, what changes would improve your agency's ability to budget and plan for your HEA responsibilities for a given year?

- More upfront financial support, such as an advance for tools/equipment budget or staffing ramp-ups.

5. The 17-136 Docket indicates that each CAA will receive "right of first refusal" for all HEA-funded projects. Is that occurring?

a. Yes. We are empowered to decide if a project should commence in a home, or if the home should be deferred due to excess moisture issues, structural issues or other health and safety concerns.

b. If not, what changes would achieve "right of first refusal" effectively?

6. The 17-136 Docket (Section 2, page 57) describes an approach to delivering HEA with certain roles identified for the "lead utility." Is the "lead utility" process working effectively for your CAA?

a. The lead utility is excellent, although it seems that the other utilities may not be completely on-board with the lead utility at times.

b. If not, what changes would achieve the "lead utility" approach effectively?

- N/A

7. Under current HEA delivery, how does your CAA handle "no heat" situations and heating system replacements?

- We respond as soon as possible with a heating system assessment and electric space heaters to be used as a courtesy until heat is restored. If the overall weatherization project must be deferred due to structural or safety issues, the availability of funding can be an issue. It would be helpful if the utilities would fund stand-alone heating systems without the need to perform a complete weatherization project.

a. Is this approach resulting in customers being assured of having heat, including in emergencies?

i. Yes. Provided we can proceed with weatherization and there is alternative funding available if weatherization cannot proceed.

b. If not, what changes would ensure customers do have heat, including in emergencies?

i. N/A

****

RESPONSE #5

1. Three ways HEA is currently working well:

- The utilities participate in statewide meetings and conference calls with OSI Weatherization, which keeps us all on the same page
- There is T&TA funding available through the utilities which has been very helpful in training contractors and auditors and Weatherization staff
- Frank Melanson, in particular, is an advocate for both the HEA program and the CAPs, recognizing our challenges and our opportunities

2. Three challenges of the HEA program and our CAA specifically:

- The different calculations used by HEA vs WAP for energy loss/energy savings; leveraging funds is encouraged but it takes a lot to get things to line up for a specific project between the two programs which requires a lot of admin attention to "get it right"
- The lack of a consistent software between the two programs which is, again, an administrative burden
- The challenge of building capacity (enough trained staff/trained and available contractors) to meet the needs of the production demands

3. Consistency:

- We don't oftentimes hear conflicting messages from individual utilities but the majority of our work comes through Eversource.

4. Budget information:

- We are provided with a production schedule that focuses more on the number of completed jobs, by utility and by county, than on specific dollar amounts
- While we are not given specific budget numbers, the message has consistently been to complete jobs and that the funding is available

5. "Right of First Refusal":

- Yes, the utilities certainly work to ensure that CAAs are given first access to jobs
- They have made it a point to say that CAAs must be able to keep up with production goals if we want this system to remain the same
- For us specifically, even working with partners such as Resilient Buildings (Dana Nute), the jobs are funneled through the CAAs and that has been very impactful in a positive way

6. Lead Utility:

- Yes, Eversource is identified as the lead utility and that is working well

7. No Heat Situations:

- No heat calls are given priority
- Priority means reaching out to them first and as quickly as possible
- Once it's been determined that a heating system repair or replacement is possible, work is scheduled with a heating tech/contractor
- We are usually at the mercy of their availability
- We do try to work with the household if there is a wait time between identifying a no heat situation and the work being completed (talking with them about other temporary housing options, talking with them about any secondary heat source they may have available in the meantime such as a wood stove, providing "on loan" space heaters - we have 5 or 6 we loan out at this point, or working with Terra through Warm Dollars for other options)

8. Other suggestions/comments:

- The HEA program provides CAAs with more flexibility than the regular Weatherization programs; this is appreciated
- Additional admin funds would be helpful
- Program advances would be helpful to continue to get contractors paid in a timely fashion without impacting agency cash flow since everything operates on a reimbursement basis; but even that is better with HEA because the individual job is uploaded and invoices in OTTER as soon as it's complete rather than waiting for a once a month billing process for all jobs
- It would be so helpful if the utilities could work with their other contractors to try to advocate for them to work with the CAAs and the HEA program; they are probably the biggest customer for some of their contractors which gives them a voice and their assistance with recruiting additional qualified contractors for the HEA program could have major positive impacts on overall production outcomes