



Phase 1

Progress Report

Prepared by DEEP's Bureau of Energy and Technology Policy

FALL 2021

**Equitable
Energy
Efficiency**



Released December 28, 2021

Phase 1

About the Progress Report

Prepared by DEEP's Bureau of Energy and Technology Policy

How do I follow along?

Accountability is critical to equity work. DEEP plans to issue updated progress reports quarterly to ensure consistent inventory of progress on the Goals of the Equitable Energy Efficiency (E3) Proceeding. Detailed descriptions of these Goals and associated Actions and progress to date can be found here.

This Progress Report summarizes the current status of the Goals and Actions. Each Action contains a color coded tracker for progress and a green squared indication of what each Action will look like when complete.

Since the release of the Summer 2021 report, the look of the color coded tracker has been updated with a 10-boxed gradient bar to reflect more information regarding the progress toward each action item's achievement. Each action item contains a blue indicator arrow to indicate the level of progress achieved in last quarter's report.

What can I expect in future progress reports?

Future Progress Reports will provide short updates regarding (1) specific progress for each action item and (2) interim steps on the horizon. DEEP plans to issue regular Progress Reports like this one throughout the E3 Proceeding.

Progress to date

E3 Phase 1 set 19 total action items, each with 10 bars of potential progress, these visuals depict the total progress to date towards achievement of all 8 goals and their 19 actions.

E3 Phase 1 Action Item Progress

■ Not Started ■ In Process ■ Complete



■ Not Started ■ In Process ■ Complete

Goal 1: Embed greater equity in decision-making

1.1 | Action

Direct the EEB to develop a plan to hire a Diversity, Equity, and Inclusion Consultant.

■ DEI Consultant hired.



Competitive hiring for a DEI Consultant is underway after several rounds of input from the Energy Efficiency Board. This position will hold a three-year term and will play a critical role in institutionalizing new equity metrics, consulting on the design and implementation of community outreach strategies, and more.

1.2 | Action

Solicit nominations for energy efficiency board membership in a more inclusive manner to increase board diversity.

■ All Board vacancies are filled using the new process.



DEEP has accepted applications and nominations for four seats on the Energy Efficiency Board: one representative each of (1) a chamber of commerce, (2) a state-wide business association, (3) low income customers, and (4) municipalities through November 15. This new process reflects DEEP's goal of making appointments more transparent and increase the diversity of the Board.

Goal 2: Enhance tracking of equity indicators in C&LM programs

2.1 | Action

Work with the utilities to assess - retrospectively and moving forward - the extent to which communities are served by energy efficiency programs.

■ Data is available and public.



DEEP has analyzed data on (1) energy burden, (2) communities of color, and (3) arrearages and shut offs for inclusion in the 2019 and 2020 Equitable Distribution Reports.

■ Not Started
 ■ In Process
 ■ Complete

2.2 | Action

Update the Equitable Distribution Report to make equity data accessible to a wider audience.

- The Equitable Distribution Reports for 2019 and 2020 are complete and a process is in place for future reports.



DEEP has created a new format for Equitable Distribution reports. The 2019 and 2020 reports will feature a refreshed, clearer, and more accessible display of relevant data and findings.

Goal 3: Develop metrics and goals to assess equitable distribution of energy efficiency funding

3.1 | Action

Broaden the current MPP metric to potentially cover medical and financial hardship customers, and include more ambitious targets to scale up the percentage of participating customers on an annual basis.

- The secondary equity metric has been modified.



The companies have updated the residential secondary metric to include all hardship customers. This metric is included in the 2022-2024 PMI structure.

3.2 | Action

Establish a baseline E3b level for Eversource and United Illuminating based on the most recent available data and establish a goal of at least maintaining the E3b figures for each utility on an annual basis.

- The E3b metric is tracked and reported in annual Equitable Distribution Reports.



In the 2022-2024 C&LM Plan term, the companies have committed to using the E3b metric to identify areas of the state with lower program participation and help them determine where outreach should be targeted.

■ Not Started ■ In Process ■ Complete

3.3 | Action

Based on the analysis of equity indicators described in Goal 2, and in consultation with the DEI Consultant, DEEP may recommend the development of new equity metrics

- Analysis described in Goal 2 is complete and new equity metrics are developed.



Following the successful hiring of a DEI Consultant (Action 1.1), DEEP plans to use the expertise of the hired DEI consultant to recommend additional equity metrics based on the newly expanded equity data and indicators being added to the Equitable Distribution Report (Action 2.1)

Goal 4: Improve program participation and impacts among moderate-income customers

4.1 | Action

Develop a definition of "moderate income"

- Final definition is released.



A definition of moderate income was established in DEEP's Final Phase 1 Determination. It defines moderate income as those with incomes above 60% of the state median income, but below 80% of the state median income.

4.2 | Action

An assessment of moderate income participation is included in the annual Equitable Distribution Report.

- An assessment of moderate income participation is included in the annual Equitable Distribution Report.



The 2019 and 2020 Equitable Distribution Reports will include an analysis of moderate-income census tracts using the definition above.

Goal 5: Streamline the eligibility process for low-income programs

5.1 | Action

Streamline eligibility based on participation in other state assistance programs through multi-lateral data-sharing across multiple state agencies and departments

- Data-sharing arrangements between departments are finalized and new eligibility criteria are created.

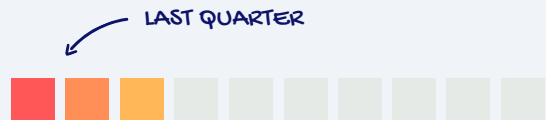


Efforts are underway to identify and address barriers to data sharing among agencies and between agencies and the utilities.

5.2 | Action

Hold a series of workshops with adequate representation to explore additional avenues for streamlining eligibility

- At least two workshops have been held.



DEEP is in the process of conducting research on how best to coordinate the various energy programs that exist. Workshop content will be developed following the compilation of that research.

5.3 | Action

Develop a tool with strong consumer protections that allows vendors to easily identify eligible customers by address to support verification and marketing activities.

- Tool is developed and in use.



During the 2022-2024 C&LM Plan term, the companies will deploy a tool that will allow communities, municipalities, and vendors to identify census tracts that meet income eligibility requirements. This tool is currently in development.

Goal 6: Improve outreach to high-need or high-impact populations

6.1 | Action

Develop community engagement practices that align with the goals outlined in this Proceeding and the C&LM Plan.

- Community engagement practices are in place and serving the communities identified as underserved in this Proceeding.

6.2 | Action

Develop a checklist to ensure that opportunities for public participation are widely shared and accessible to a diverse group of stakeholders.

- Checklist is complete and released.



The first round of applications for the utilities' Community Partnership for Energy Efficient Engagement Initiative closed on October 1, 2021. DEEP looks forward to following the results of this first round and working with the utilities and eventual DEI Consultant to apply lessons learned to future outreach efforts.



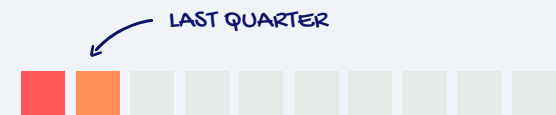
DEEP has prepared a checklist to guide public participation opportunity development. The checklist will be used across the bureau.

Goal 7: Address health and safety barriers to low-income weatherization access

7.1 | Action

Work with the Connecticut Green Bank to explore improved financing options for HES and HES-IE customers to access interest-free financing for health and safety barrier mitigation.

- Improved financing options are available.



DEEP is currently conducting research on the breadth of health and safety financing measures in the state. DEEP is also coordinating with the Green Bank on this effort to identify the gaps within the state and how to address them.

7.2 | Action

Develop a DEEP-administered program with supplemental funding sources to remediate health and safety barriers to weatherization in low-income homes.

- Program has resolved barriers in 50 homes.



After receiving stakeholder input, DEEP is in the process of completing a competitive solicitation to select a program operator(s) to administer a Health and Safety Barrier Remediation Program that will devote over \$12 million in funding over three years to preparing unsafe homes that contain health and safety hazard for energy-saving weatherization upgrades.

Goal 8: Address and remove barriers to participation among renters

8.1 | Action

Engage with both landlords and renters on the benefits of HES and HES-IE and teach them how to participate in the programs.

- Engagement practices specifically for renters and landlords are developed and implemented.



During the 2022-2024 C&LM Plan term, the utilities, as directed by DEEP, will be holding additional landlord roundtables that build off of the roundtables they held in 2021. DEEP is also exploring additional opportunities to engage with landlords on affordable housing energy retrofits.

8.2 | Action

Leverage existing incentives with federal funding and other funding sources as approved to provide a comprehensive approach to energy retrofits for affordable housing.

- 50 homes have been served by Energy Retrofit program.



DEEP has created an Office of Affordable Housing Energy Retrofits and is currently preparing to launch a stakeholder engagement process.

8.3 | Action

Maintain the landlord agreement in the interim as the utilities gather data on rental units that do not proceed due to lack of landlord approval.

- Landlord agreement has been reassessed based on data from the utilities.



In March 2021, the utilities developed a new process for collecting data on HES and HES-IE visits that did not proceed due to lack of landlord approval. Preliminary data suggests that 21% of units (33% of HES units and 14% of HES-IE units) were deferred for this reason from March-November, 2021. This information is critical to determining the extent to which the landlord approval is ultimately necessary to ensure residential-renter access to energy efficiency.

