

# Advancing Energy Affordability – National Grid's Versatile Approach



Low Income Forum on Energy Statewide Meeting; Albany, NY  
May 23, 2017

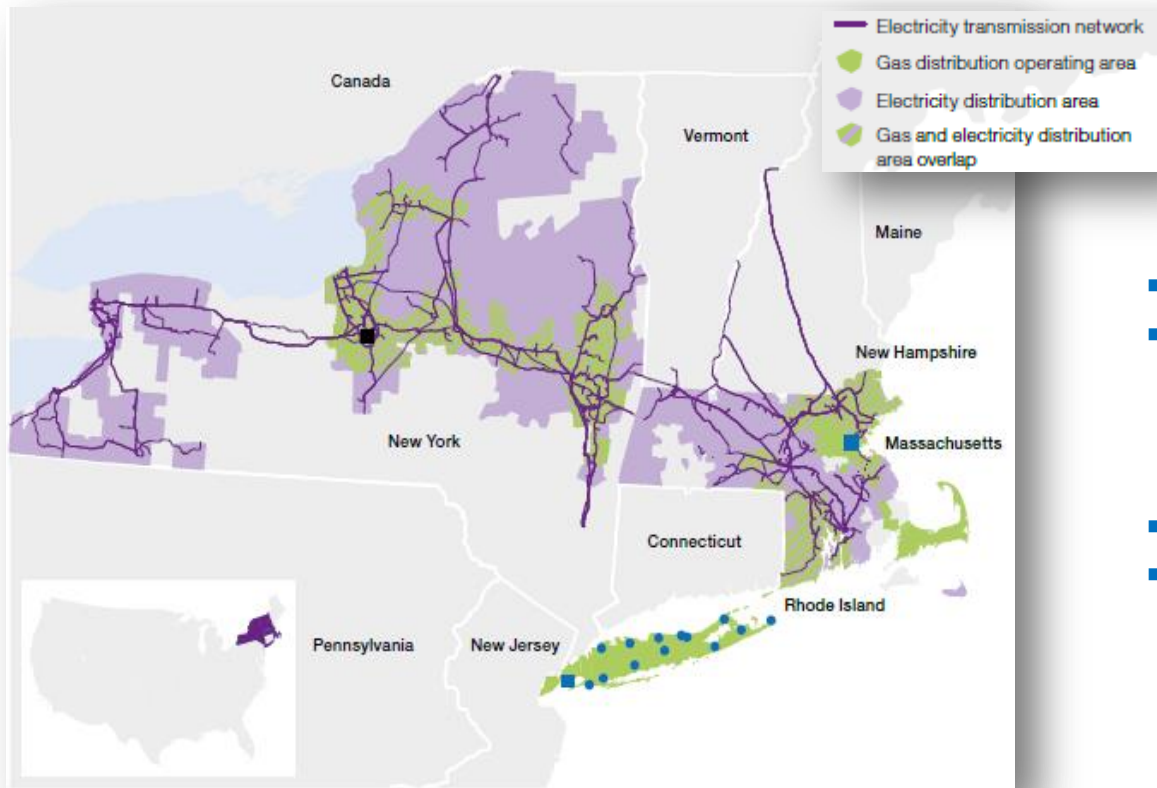
# Agenda

- Introduction to National Grid – Brittney Pietro
- Customer Advocacy and Low Income – JoAnn Zales
- Income Eligible Natural Gas Conversion Programs – Kevin Grandjean
- HEAT (Home Energy Affordability Team) – Carolyn King
- Multi-Family Programs – Rachel McCrea
- Questions and Answers

# National Grid's U.S. business

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*National Grid is one of the world's largest investor owned utilities, with more than 7 million gas and electricity US customers and 22,000 employees in the U.S. and U.K.*



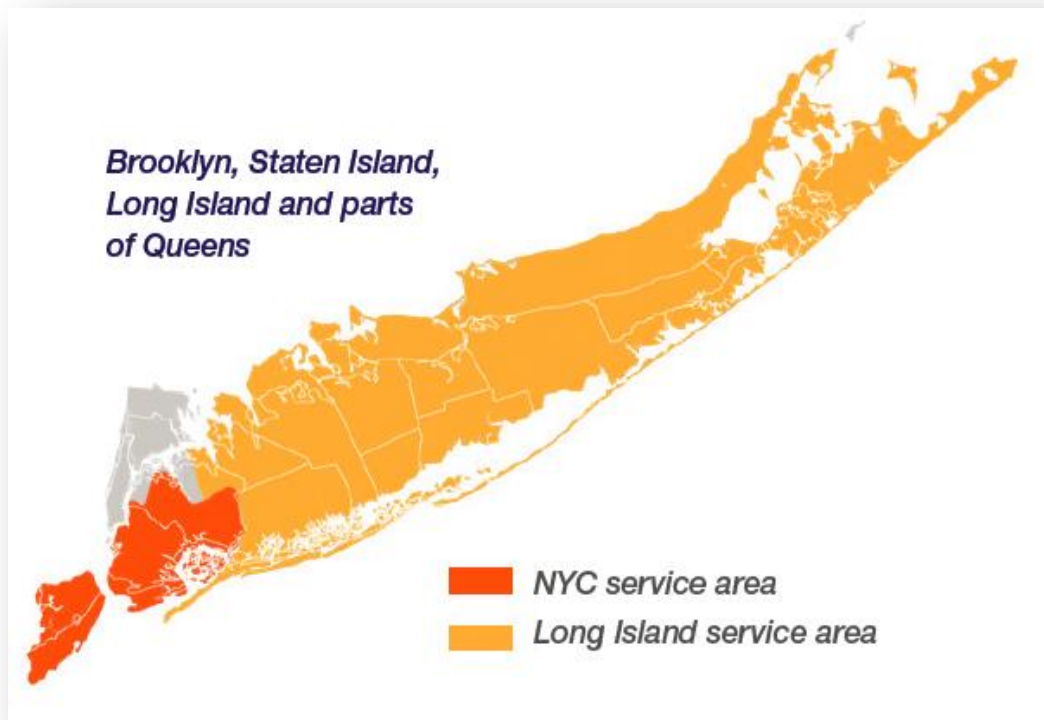
## National Grid U.S. by the numbers

- 3.4 million electric customers
- Electricity transmission network of 8,800 miles of overhead line; 100 miles of underground cable, 380 transmission substations
- 3.6 million gas customers
- Gas network of 35,000 miles of gas distribution pipeline; 490 miles of gas transmission pipeline

# National Grid Downstate New York (DNY)

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*National Grid is committed to the future of energy in Downstate New York*



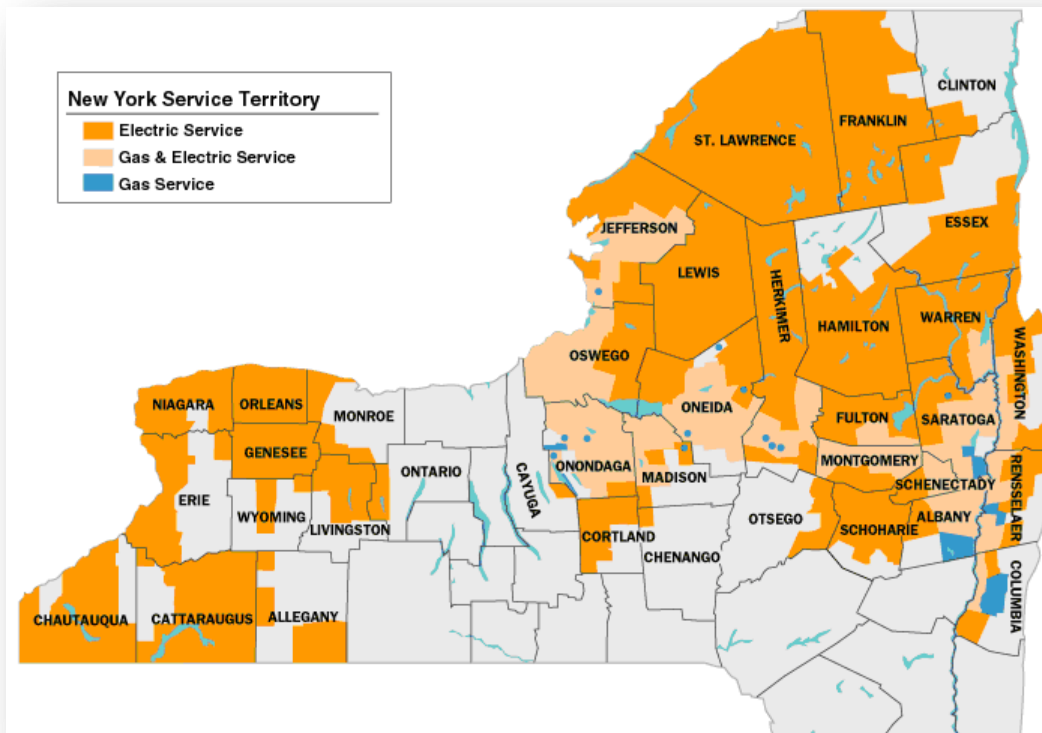
## **The Brooklyn Union Gas Company and KeySpan Gas East Corporation**

- 4,000 employees in downstate New York
- 1,800,000 million natural gas customers
- 12,000 miles of existing natural gas pipelines
- \$3 billion of investment planned 2017-2019
- 15,000 new service connections since 2016
- 113 miles of new gas main installed since 2016

# National Grid Upstate New York (UNY)

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*National Grid is committed to the communities we serve across Upstate New York.*



## Niagara Mohawk Power Corporation

- 4,000 employees in upstate New York
- 1.6 million electricity customers; 594,000 gas customers
- Serving customers across 24,000 square miles
- \$1.5 billion invested annually in operations and maintenance
- \$1 billion of annual capital investment
- \$710 million paid in state and local taxes

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# National Grid Consumer Advocacy & Low Income



# Advancing Energy Affordability through Advocacy and Outreach

- Low Income Components
- Consumer Advocacy Overview
- Grassroots Campaign
- Customer Assistance Expos
- National Grid's Consumer Advocacy Outreach Center – Brentwood, NY (Long Island)
- National Grid Low Income Programs
- Home Energy Assistance Program (HEAP)
- Energy Efficiency



# National Grid Low Income Programs

- Variety of low income programs using various components
  - Arrearage Management
  - Energy Efficiency
  - Energy AffordAbility Program
  - Discount/Credit
  - Arrears Forgiveness
  - Reconnect Fee Waivers
  - Fuel Funds
  - National Grid Consumer Advocacy Group





# Consumer Advocacy

## Consumer Advocacy

- National Grid has 15 Consumer Advocates that cover 48 counties and boroughs – there are 9 Consumer Advocates in Upstate New York, 2 Consumer Advocates in New York City and 4 Consumer Advocates on Long Island
- Work one-on-one with customers and agency staff – at agency locations
- Some of the assistance provided to customers experiencing financial difficulties are:
  - specialize payment arrangements
  - deferred payment agreements
  - bill extender program
  - third party notification
  - hospitalized customer assistance plan
  - budget plan
  - on line bill-pay



# Consumer Advocates

## Overview

- National Grid Consumer Advocates are available to assist low-income, unemployed and “special needs” (elderly, blind, and disabled) residential customers experiencing financial hardship by:
  - Providing information to customers about programs and services that are available from National Grid and other community services organizations.
  - Programs include but are not limited to:
    - Home Energy Assistance Program (HEAP)
    - Temporary Assistance
    - Care & Share Fuel Fund (UNY)
    - Energy AffordAbility Program (EAP)



# Consumer Advocates

## Overview

- Making home visits to housebound customers when needed
- Conduct presentations to consumer groups and agencies on financial assistance programs, energy saving tips, and customer payment options.
- Hold Customer Assistance Expos where advocates and agency partners offer on-the-spot assistance to customers
- Grassroots outreach “Advocates in Action” – where advocates work side by side at various agency partner locations with customers one-on-one.



# Consumer Advocates

## Grassroots Campaign

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## Grassroots Campaign

Advocates go out into their communities and work with customers and agencies one on one with their laptops. Examples of agencies:

- Department of Social Service
- Office of the Aging
- Veterans' Organizations
- Senior Housing
- Senior Centers
- Food Banks
- Domestic Violence Shelters

# Consumer Advocates

## Summary

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### In Summary:

- Advocates assist customers in areas that go beyond their utility service. National Grid understands that all the needs of our customers impact their ability to maintain continuous service and we are prepared to help our customers in many ways.
- Through extensive outreach and education, Advocates are able to form relationships with government agencies and charitable groups to work cooperatively in meeting all the needs of our vulnerable customers.
- Advocates update their knowledge on a regular basis to make ensure their ability to refer customers for assistance that is appropriate for their needs.
- We continue to monitor the trends of the areas we serve in order to proactively reach out to groups and identify unexpected segments of customers requiring assistance.
- We provide highly relevant demographic knowledge which is critical to advocacy success.
- Treat our customers with respect and ensure their dignity.
- Embrace the diversity of our customer base and ensure our programs meet their needs.



# Customer Assistance Expo

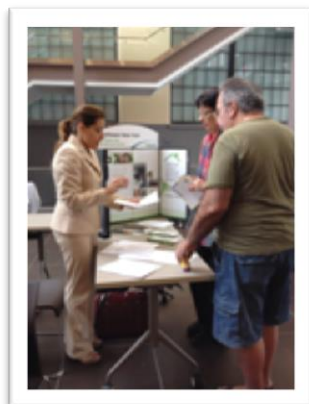
Life Can be Hard, but finding assistance should not be

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## Customer Assistance Expos:

- Provide low income customers with ways to connect with the resources they need, all under one roof in one day.



# Customer Assistance Expo

Life Can be Hard, but finding assistance should not be

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## Expos Offer Opportunities:

- To work one-on-one with customers and agencies in their neighborhoods.
- To work as a community team – maximizing resources  
Most important they provide hope to customers who feel like there is no place to turn.

## Customer's have said:

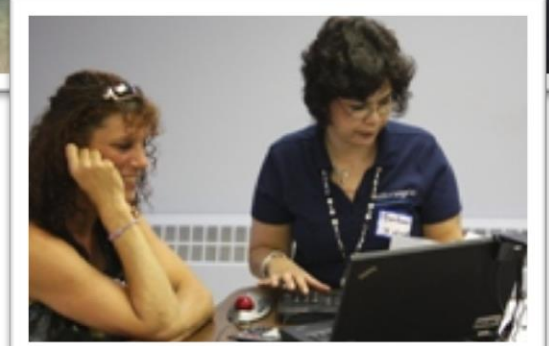
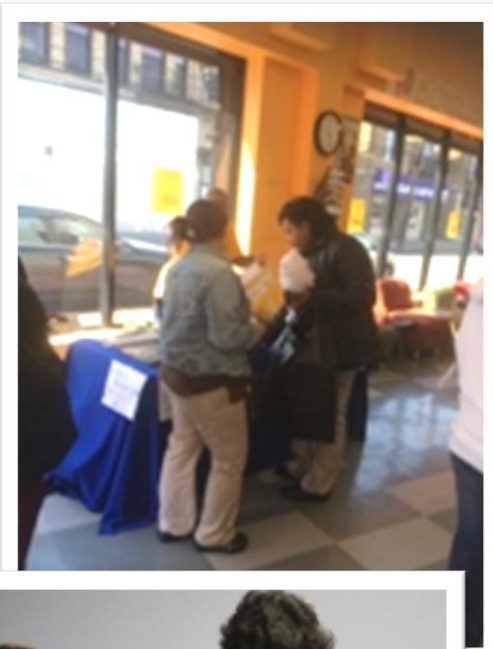
- “I didn’t know so many people cared.”
- “When are you going to do this again?”
- “Now I can sleep tonight – you are my angel.”





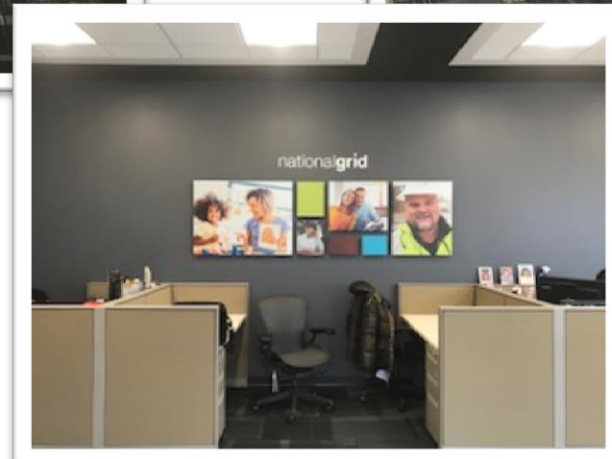
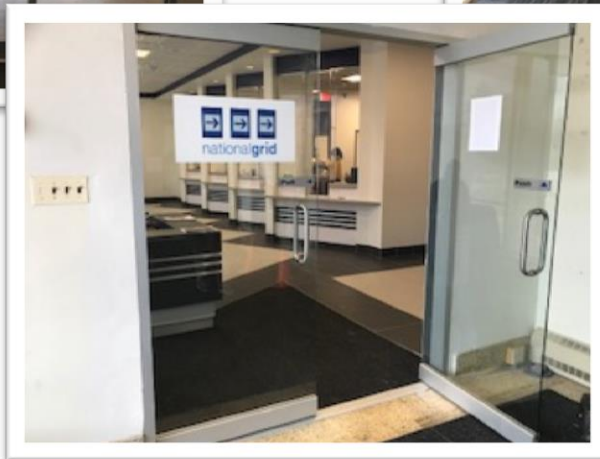
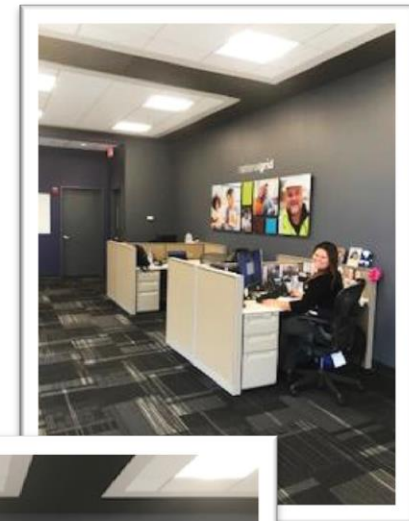
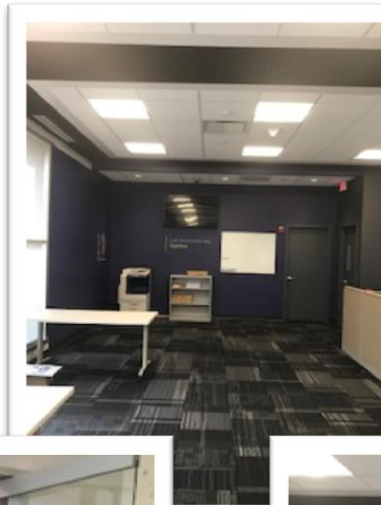
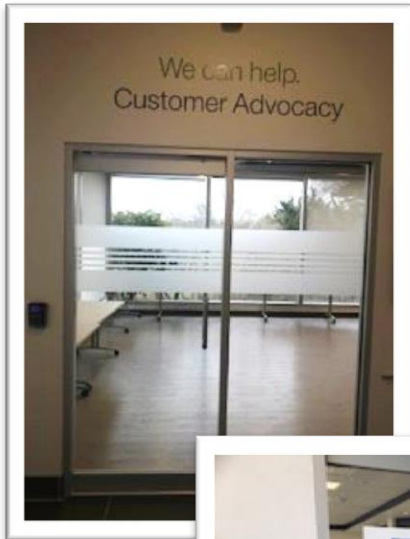
# Consumer Advocacy

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# Brentwood Customer Advocate Center Long Island

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# National Grid's – New Brentwood Center

## Long Island



## Overview

- Consumer Advocates will be on-site at the new National Grid Customer Advocacy Outreach Center in Brentwood to provide one-on-one assistance to income eligible and vulnerable customers in meeting their home energy needs. Advocates connect customers to programs and services offered by National Grid as well as other local community agencies. They also provide energy efficiency tips and gas safety information.
- We will be focusing on customers who are vulnerable, income eligible, seniors, veterans, unemployed and underemployed, and that have medical conditions including disabilities.
- National Grid is excited to have this first of its kind Customer Advocacy Center where they will host outreach and educational events such as: Customer Assistance Expos, Financial Literacy Programs, meeting with our community partners and hold other community related events.

# Upstate Low Income Programs

## Energy AffordAbility Program

- The Energy AffordAbility Program (EAP) assists income-eligible customers with managing home energy bills. EAP is replacing the current Income Basic Service Charge Credit. EAP is automatic with receipt of, and continued enrollment in the Home Energy Assistance Program (HEAP).
- EAP bill credits are based on the customer's HEAP benefit. HEAP benefits are structured in a way to ensure that the households with the lowest incomes and the highest energy costs receive the highest benefit.

## Reconnection Fee Waiver

- A one time waiver reconnection fee for HEAP recipients who had their service disconnected for non-payment.



# UNY Energy AffordAbility Program (EAP)

## Energy AffordAbility Program

- Regular HEAP benefits include a base benefit – Tier 1
  - If applicable, two add-ons are available to assist the neediest households.
- Households whose income falls within the lowest income levels will receive a \$26 add-on. (HEAP + 1) – Tier 2
- Households with a vulnerable member (under age 6, age 60 or older, or permanently disabled) will receive a \$25 add-on. (HEAP + 1) – Tier 2
- Households may receive both add-ons, if eligible, for a total increase of \$51 to the base benefit (HEAP + 2) – Tier 3.
- Households currently on the Direct Voucher (DV) or Guarantee (GU) – Tier 4.
- Households identified on the NYC HRA File, and the OTDA file match – Heating – Tier 1 and Non-Heating – Tier 5.
- In NYC and on Long Island customers can qualify for EAP with proof of qualifying programs other than HEAP.



# Fuel Fund Administered by HeartShare

## Upstate New York

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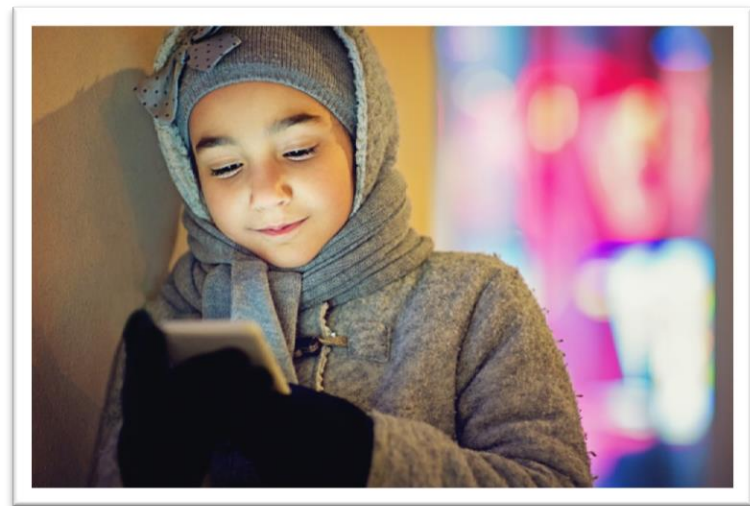
## Care & Share

Provides financial assistance for households facing energy-related emergencies HEAP eligible households.

- Company contributes \$250M

## Eligibility Criteria

- National Grid Customer
- HEAP eligible
- Exhausted all HEAP



# Fuel Funds Administered by HeartShare

## New York City

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### Neighborhood Heating Fund

- Provides financial assistance for eligible households facing energy-related emergencies.
- National Grid contributes \$150K annually.

### **Eligibility Criteria**

- Eligible customers must live in Brooklyn, Queens, or Staten Island.
- Customers must meet the income guidelines of the Home Energy Assistance Program (HEAP). One grant per heating season.





# Fuel Fund Administered by United Way

## Project Warmth

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### Project Warmth

- Project Warmth is a community-based partnership between National Grid, local businesses, and not-for-profit agencies designed to help Long Island families suffering from recent financial hardships to meet their heating needs, regardless of fuel type.

### Eligibility

- Customer must have received HEAP first, and also need a termination notice to apply for Project Warmth.

### For a Referral

- Eligible customers can call United Way's 2-1-1 Information line by dialing 2-1-1 or 1-888-774-7633 for a referral.



# Home Energy Assistance Program

## Overview

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**HEAP** is a federally funded program that assists low-income New Yorkers with the cost of heating their homes. HEAP also offers an emergency benefit for households in a heat or heat related emergency.

- Regular HEAP – Used for assistance for the customer's main source of the household's heat – opens historically in November. No utility shut off is needed – income based. Food Stamp/SNAP customers receive this automatically
- Emergency HEAP – Used for emergency assistance (utility shut off needed and income eligibility) for the customer's main source of heat – opens historically in January.
- Good to know:
- There continues to be a tenant of record requirement for emergency HEAP. As with regular HEAP, the client must only prove that they reside in the residence and that it is their primary residence. They must be customer of record for emergency HEAP.
- A household that has already received both regular and emergency HEAP for non-utility fuel heat may still be eligible for a heat-related domestic emergency benefit if electric service is necessary to operate the furnace or the thermostat.

# Thank you!

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REMARKS (If it has changed since last issue, please attach a statement)

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# UNY (NMPC) Income Eligible Natural Gas Conversion Program



# Program Details

## Overview:

- The goal of the programs is to help assist customers who would never be able to afford a natural gas conversion the opportunity to do so.
- The Low Income programs are made up of:
  - Enhanced Rebate Conversion Rebates – Effective July 2014 – provides reimbursement of up to \$7500 to Weatherization Agencies assisting low income customers installing natural gas heating equipment.
  - CIAC Relief Program– Effective April 2018 – increases footage allowance to 150’.
- Approved budget: \$1 million for incentives.

## Outreach and Marketing:

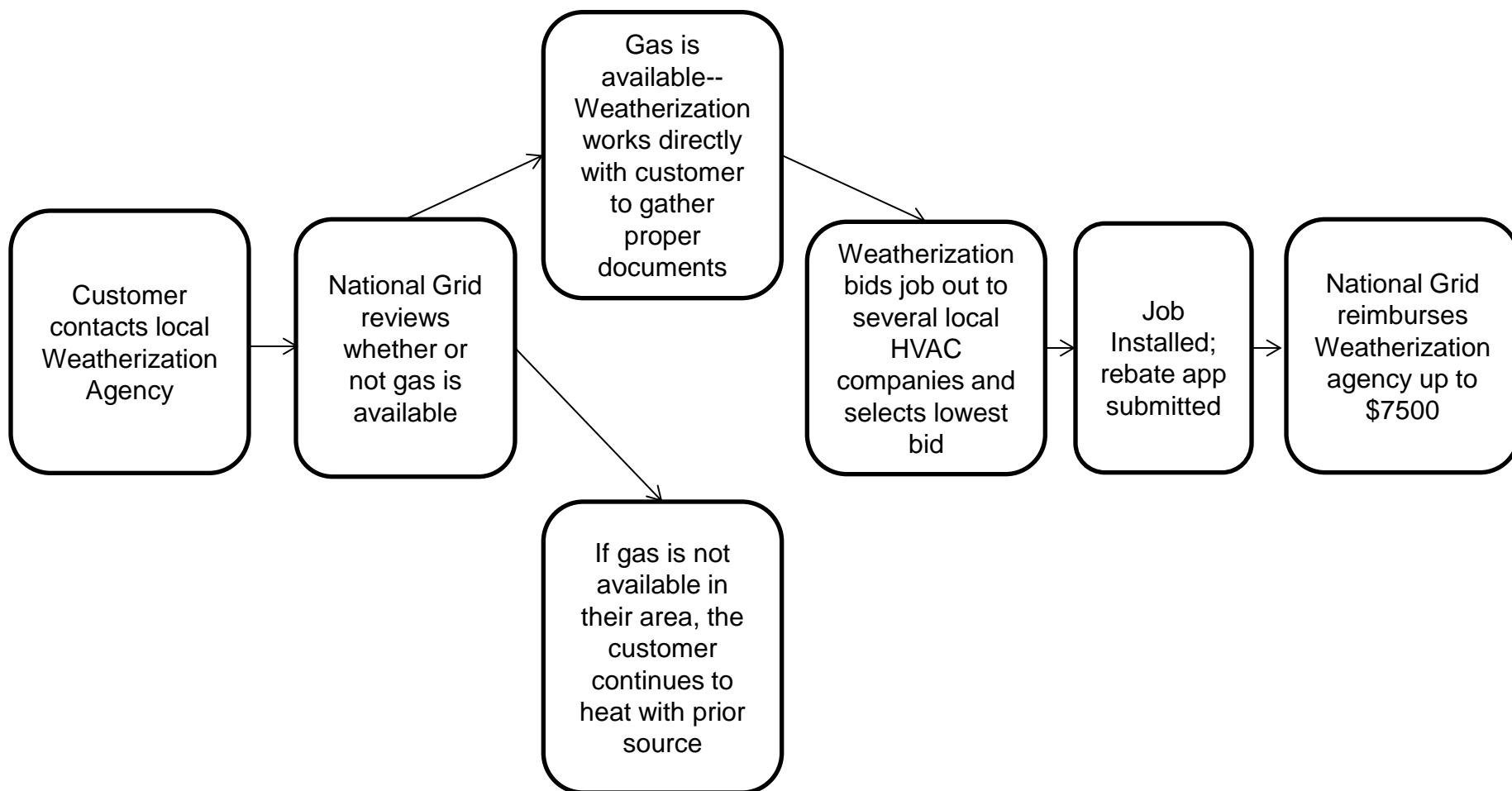
- Referrals to the programs come from National Grid Consumer Advocates and Weatherization Agencies.



# Program Eligibility

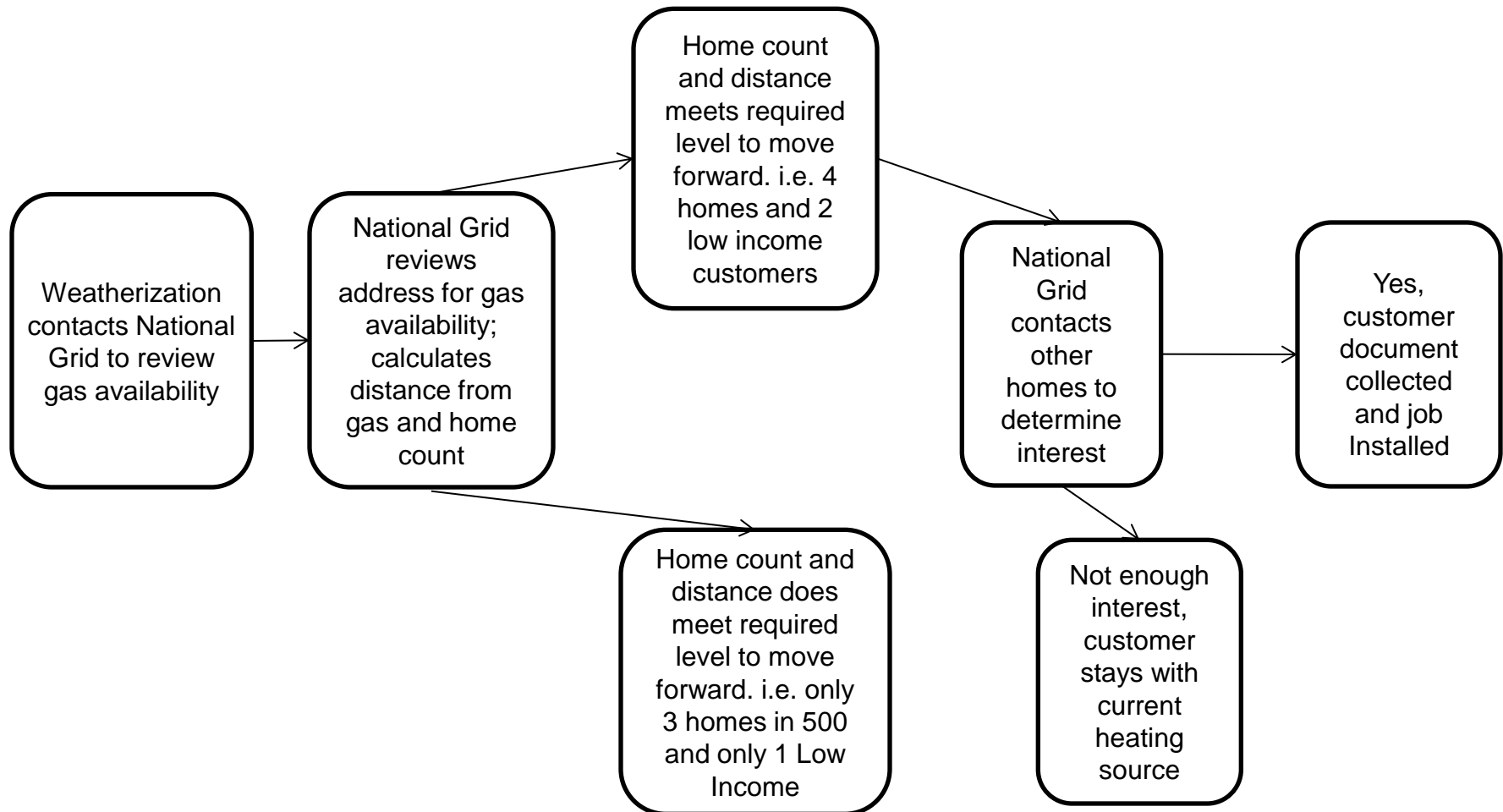
- Customer eligibility is based on eligibility for National Grid's other low-income programs such as the Energy AfforAbility Program (EAP), which qualifies customers if they receive assistance from the following programs:
  - Home Energy Assistance Program (HEAP)
  - Medicaid
  - Supplemental Nutrition Assistance Program (SNAP)
  - Temporary Assistance for Needy Families (Family Assistance)
  - Safety Net Assistance (Public Assistance)
  - Supplemental Security Income (SSI)
  - Veteran's Disability Pension
  - Veteran's Surviving Spouse Pension
  - Child Health Plus
- Customers not receiving any of the above assistance are eligible if they make less than 60% of the state median income (SMI).

# Customer Enrollment Process





# CIAC Relief Program Process



# Thank you!



**NMPC:**

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# DNY (KEDNY/KEDLI) Income Eligible Natural Gas Conversion Program



# Program Details

## Overview:

- The goal of the program is to help those customers who would never be able to afford a natural gas conversion the opportunity to do so.
- Income Eligible program was filed as a component of the Company's KEDNY KEDLI joint proposal and approved in December 2016.
- Approved budget: \$4.5 million for incentives.
- Program was launched in January 2017.

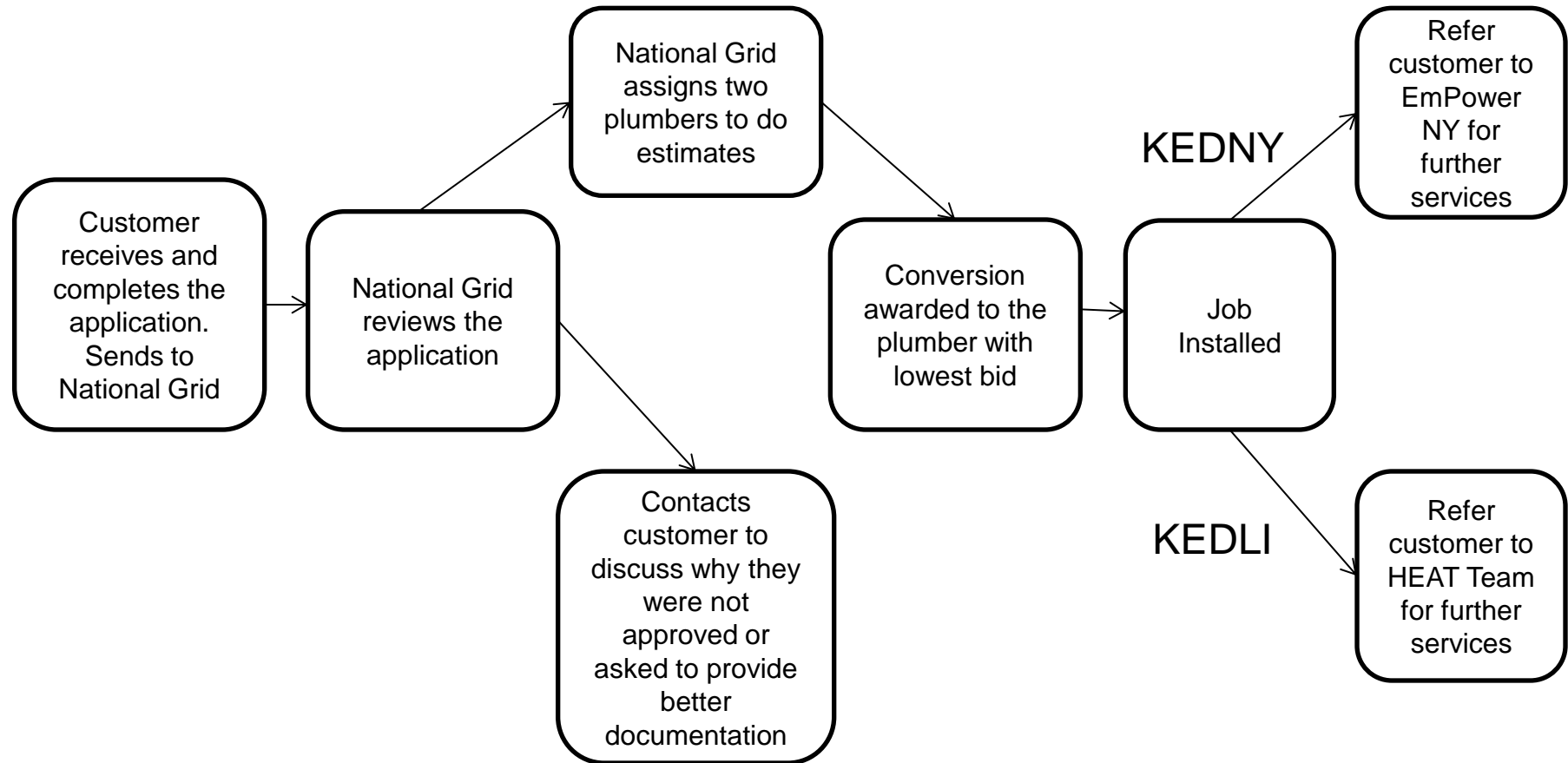
## Outreach and Marketing:

- National Grid's marketing team targeted customers who received HEAP payments through Direct Marketing tactics.
- Referrals to the program come from consumer advocates at National Grid and at PSEG-LI, HeartShare, NYC HRA as well as our Value Plus Installers.

# Program Eligibility

- Customer eligibility is based on eligibility for National Grid's other low-income programs such as the Energy AfforAbility Program (EAP), which qualifies customers if they receive assistance from the following programs:
  - Home Energy Assistance Program (HEAP)
  - Medicaid
  - Supplemental Nutrition Assistance Program (SNAP)
  - Temporary Assistance for Needy Families (Family Assistance)
  - Safety Net Assistance (Public Assistance)
  - Supplemental Security Income (SSI)
  - Veteran's Disability Pension
  - Veteran's Surviving Spouse Pension
  - Child Health Plus
- Customers not receiving any of the above assistance are eligible if they make less than 60% of the state median income (SMI).

# Customer Enrollment Process

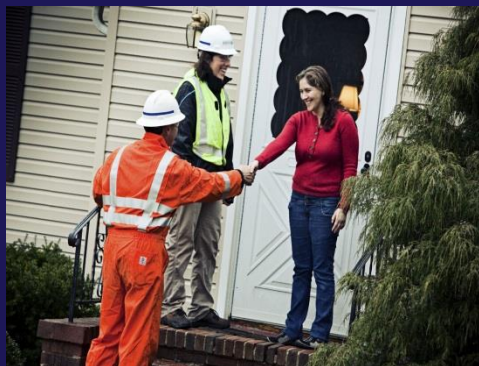


## Community Partnerships

- Coordinating outreach efforts with both National Grid and PSEG Long Island consumer advocates to identify potentially eligible participants.
- Works with HEAT program to identify customers who would be eligible for additional energy savings measures.
- Participating in community events that provide education and outreach to customers.
- NYC program is administered in partnership with HeartShare a Brooklyn based non-profit who help homeowners apply for HEAP.



# Thank you!



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**KEDLI:**

Christine Kiviat

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# KEDLI Income Eligible Energy Efficiency Program Home Energy Affordability Team (HEAT<sup>SM</sup>)



# Program Scope

- The goals of the program are to achieve energy savings and reduce bill impacts through education and implementation of energy efficiency measures and increase the health, safety, and resiliency of income eligible customers' homes.
- The program was filed as a component of the Company's KEDNY & KEDLI Joint Proposal and approved in December 2016.
- Approved budget: \$1.75 million total for administration, implementation and incentives, with a 15% cap on administrative costs.
- CLEAResult was selected as the program's implementation vendor through the Company's procurement process.
- The program was branded as HEAT<sup>SM</sup> and launched in April 1, 2017.

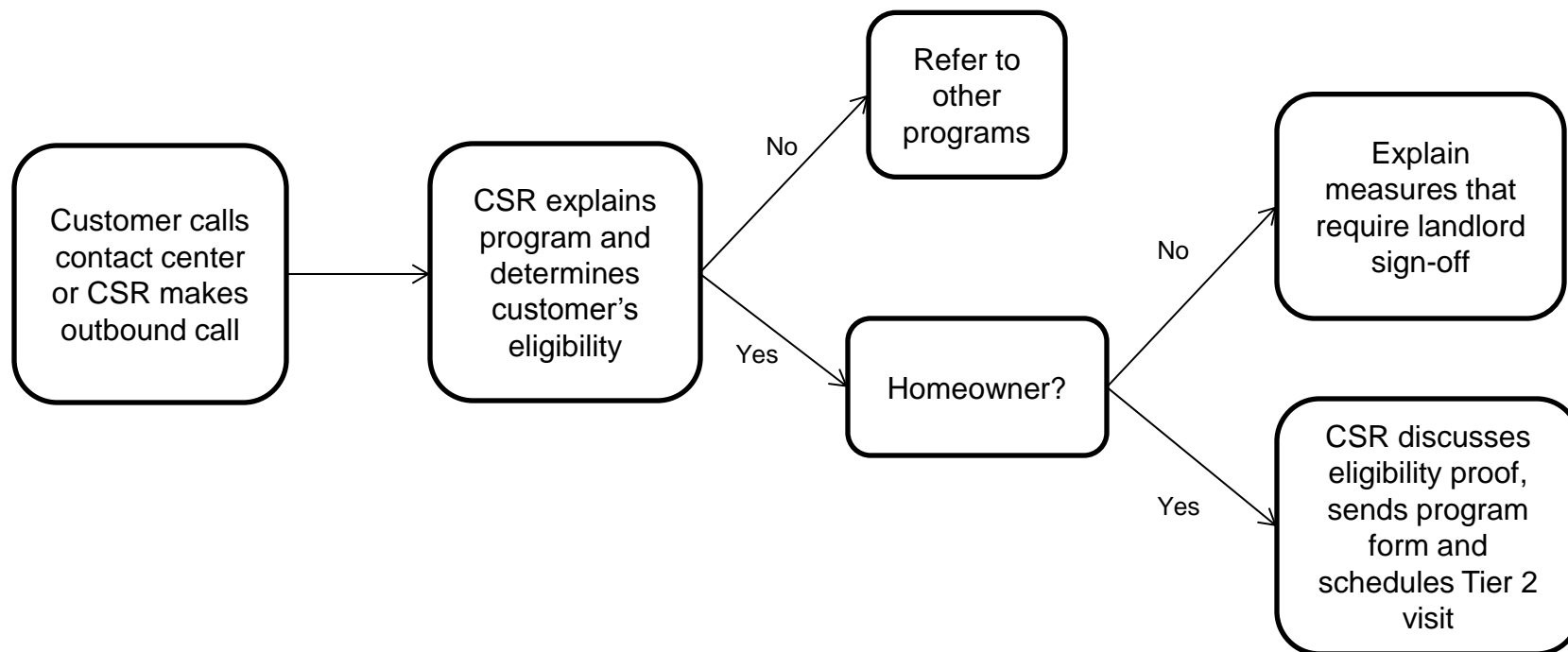
# Program Description—Tier 1

## ■ Marketing and Outreach

- National Grid's marketing team targets Energy AffordAbility Program (EAP) participants and customers who received HEAP payments through various marketing channels.
- Referrals for additional services for income qualified customers are received from the National Grid Income Eligible Natural Gas Conversion Program.
- CLEAResult performs the following outreach tasks:
  - Conducts outbound calls to approved customer lists
  - Works with National Grid and PSEG Long Island consumer advocates to identify potentially eligible participants
  - Participates in community events that provide education and outreach to customers

# Customer Enrollment Process

- CLEAResult operates a Customer Contact Center that provides full service to customers; available M-F, 8am-6pm



# Program Description—Tier 2

## ■ Home Energy Assessment & Health and Safety Check

The HEA is a “walk-through” style energy evaluation of a customer’s home, focusing on how all the household systems work together, and identifying any elements of concern or areas for improvement. As part of the HEA, the gas appliances, heating system and gas energy-consuming equipment are examined to determine their impact on the home’s energy efficiency.

During the HEA, the following measures may be installed in the customer’s home:

- Faucet Aerator .5 & 1.0 gpm
- Low Flow Showerhead 1.5 gpm
- Low Flow Handheld Showerhead 1.5 gpm



# Program Description—Tier 3

- Prescriptive Measures - Recommendations from Home Energy Assessment and Health and Safety Test
  - Smart Programmable Thermostat
  - Air Sealing
  - Duct Sealing
  - CO Detector
  - Attic Prep Work (baffling, soffit vents, etc.)
  - Attic Insulation
  - Attic Hatch (zipper tent, kneewall hatch, ceiling hatch, drop tent)
  - Air Leakage Sealing
  - High Efficiency Heating Equipment (Gas Furnaces, Boilers)
  - Energy Star Tankless Water Heater
  - Energy Star Storage Tank Water Heater

# Program Description—Tier 4

- **Custom - Health and Safety & Resiliency**
  - Miscellaneous Tier 4 Project (other Health and Safety fixes, etc.)
  - Smoke Detectors
  - T&P Drip Tubes
  - Ventilation Improvements
  - Emergency Heat Referrals

# Earnings Adjustment Mechanism

- An Earnings Adjustment Mechanism (EAM) was filed with the PSC in order to earn on REV-aligned activities that are intended to produce deeper and longer lasting beyond those of traditional Energy Efficiency programs.
  - Tier 3: 0.007% of annual budget per household served
  - Tier 4: 0.014% of annual budget per household served

# Thank you!

**Toll free number: 1-844-375-HEAT (4328)**

**E-Mail: NGridLIHEAT@clearresult.com**



**KEDLI:**

Carolyn King

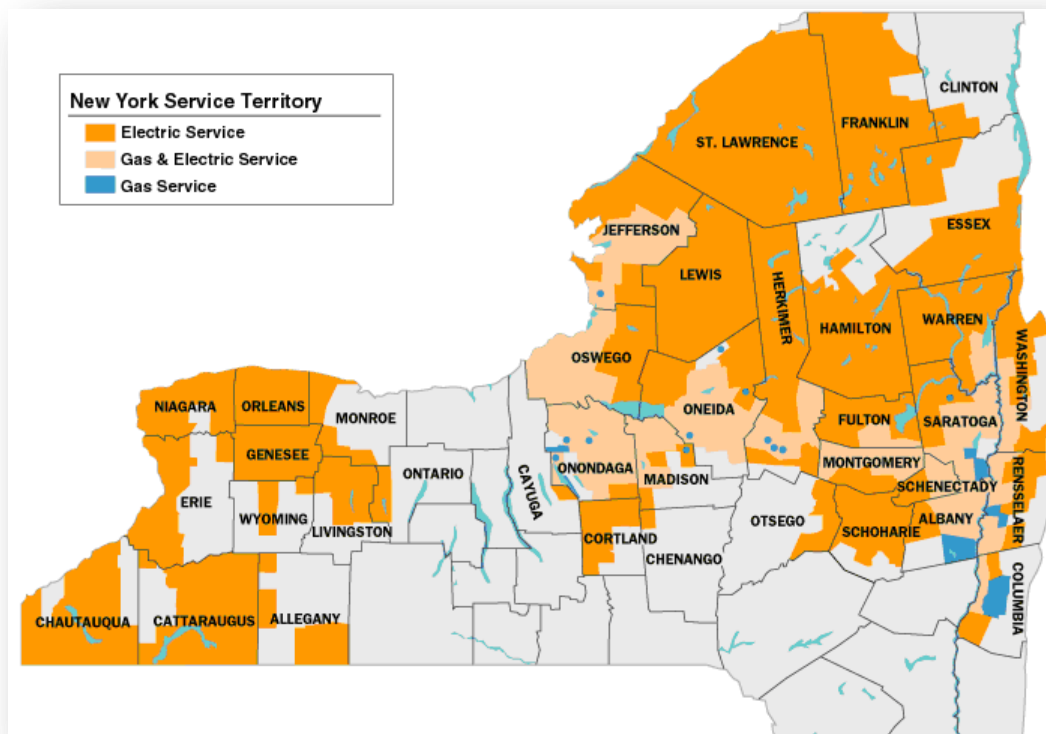
315-428-5329

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# UNY (NMPC) Energy Wise Multifamily



# Program Scope



- Expand Energy Wise Multifamily Program to Low to Moderate (LMI) income properties
- Additional \$1.7 million electric and \$300,000 gas dedicated to LMI incentives
- RISE Engineering was selected as the program's implementation vendor through the Company's procurement process
- Program offered for NMPC (UNY) service territory



# Program Description

## Benefits

- More affordable, comfortable units that improve occupancy rates.
- Lower energy bills for tenants and/or owners.
- A more even and comfortable temperature throughout the building.
- Reduction in CO<sup>2</sup> emissions for any energy used that produces fossil fuels.

# Customer Eligibility

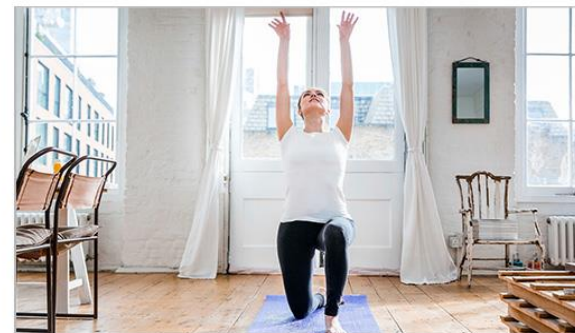
- Building or complex with 5+ units
- National Grid electric and/or gas customer
- Building owner/agent must apply
  - Landlord
  - Property Manager

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Comprehensive energy solutions  
keep comfort and savings aligned.



Bigger energy-efficient solutions mean better results for your whole property, whether it's saving energy, money, or ensuring the satisfaction of your residents.



[Discover incentives](#)

Restrictions apply. See website for details.  
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# Program Eligible Measures

- **FREE Energy Assessment**
- **FREE Direct Install Measures:**
  - LED screw-in lighting
  - Faucet Aerator .5 & 1.0 gpm
  - Low Flow Showerhead 1.5 gpm
  - Low Flow Handheld Showerhead 1.5 gpm
  - DHW Pipe Wrap
  - WIFI Thermostats
- **Incentives available for:**
  - Common Area Hardwired Lighting
  - Air Sealing

# DNY (KEDNY/KEDLI) Energy Wise Multifamily



# Customer Eligibility

Installation of free high efficiency water and heating saving measures (\$250 to \$600 Value per apartment).

- 5 dwelling units or greater in New York City and Long Island National Grid Gas Service territories (KEDNY and KEDLI).
- Must be on a firm multifamily gas heating rates.
- Temperature controlled (TC) and interruptible gas heating rate customers are not eligible.

# Program Eligible Measures

## **Free installation of high efficiency measures may include:**

- Kitchen Faucet Aerators - 1.50 GPM
- Bathroom Faucet Aerators - 1 GPM
- Restricted Flow Showerheads 1.75 GPM
- Steam traps (Limited Time)

## **Implementation Vendor:**

**Association for Energy Affordability, Inc. (AEA)**

**Contact info: 1-800-427-6318**



# Thank you!



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