

From: Kathleen Hopkins [REDACTED]
Sent: Monday, June 01, 2015 3:24 PM
To: Bartlett, Sady
Cc: [REDACTED]

Subject: DSC Recommendation for AC and Heating Repair or Replacement

Please relay our thanks to the LIC Advisory Task Force (LICATF) for the opportunity to speak on behalf of the Discount Steering Committee (DSC) at the LICATF meeting Friday May 29th. In response to presenting and asking the task force to consider our original recommendation from November 2014 to maintain AC and heating repair and replacement in the 2015 budget and to Karen Hadden's request for a copy of the full list of DSC recommendations along with data on the households potentially needing AC and heating repair or replacement; all now attached. To add context to the data on households eligible for repair or replacement there is a culling effect from those eligible (277) to those that have completed the educational component and could, if have the need for repair or replacement, be eligible to receive the benefit.

We thank the LICATF for their work and for allowing us to be a part of it!

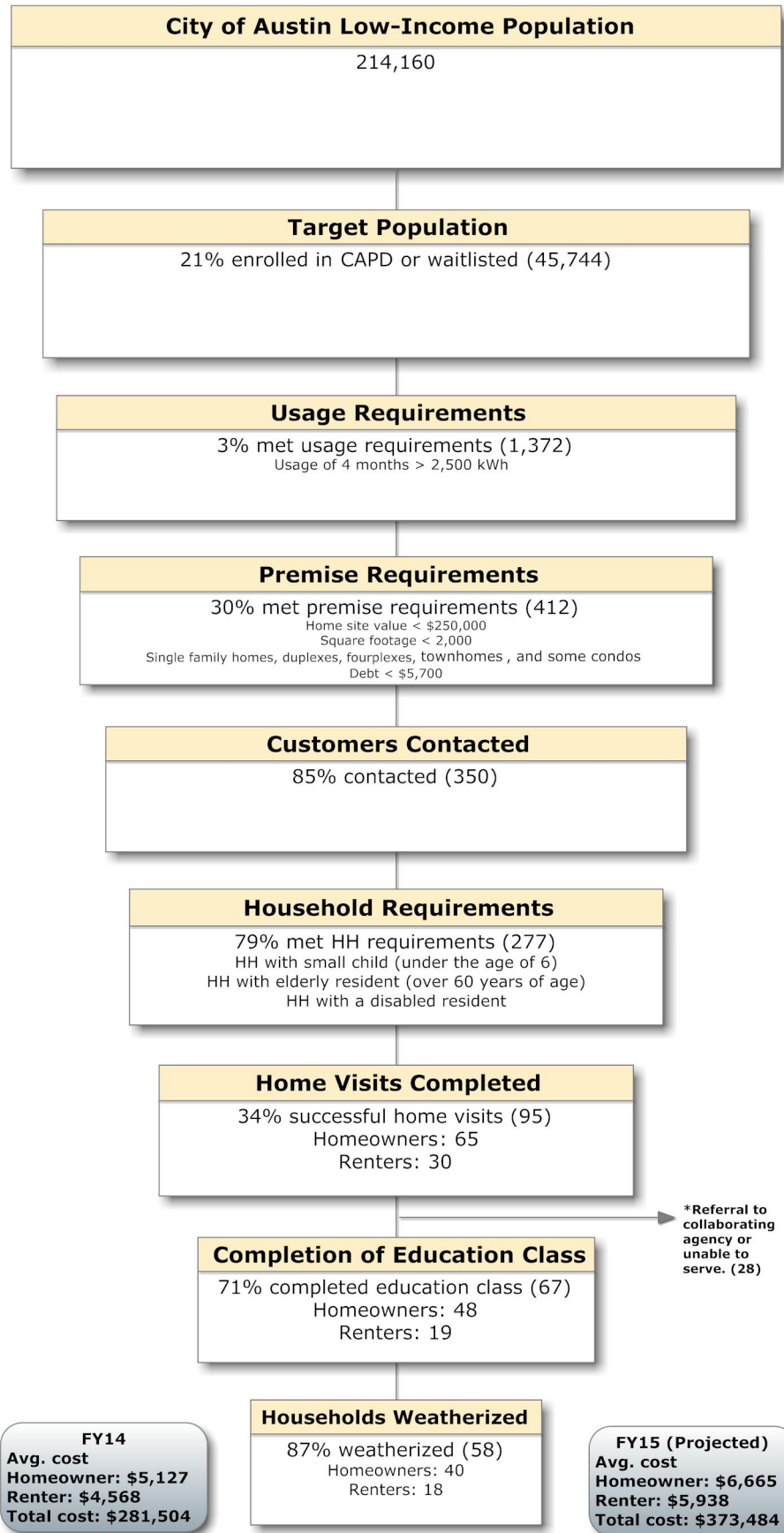
Kathleen Hopkins
Chief Operations Officer
Any Baby Can
6207 Sheridan Ave.
Austin, TX 78723
512.334.4418
www.anybabycan.org

Facebook: www.facebook.com/anybabycan
Twitter: twitter.com/anybabycan



At Any Baby Can, our mission is to empower families so children can succeed.

Priority 1





Discount Steering Committee Weatherization Decision Points



September 24, 2012

It is the decision of the committee that once all class instruction is completed the customer will be eligible for home weatherization.

Meals On Wheels JP
Caritas AC SC maa
HACA maa
Texas VFW AAK
Any Baby Can MAA
St. Austin's ASM
Travis County TO

The DSC agreed about the 2,500 kWh target for implementing weatherization and case management.

Meals On Wheels JP
Caritas AC SC maa
HACA maa
Texas VFW AAK
Any Baby Can MAA
St. Austin's ASM
Travis County TO

Agreement was made on the education topics and which ones have to be instructor guided (understanding your usage and bill, energy and water conservation, indoor air quality and budgeting) and the ones that can be self guided (source of energy and water, reduce/reuse/recycle, safety hazards and tenant rights).

Meals On Wheels JP
Caritas AC SC maa
HACA maa
Texas VFW AAK
Any Baby Can MAA
St. Austin's ASM
Travis County TO

Case management is tied directly to weatherization. Follow-up will be conducted for 18 months including conservation reminders and incentives.

Meals On Wheels JP
Caritas AC SC maa
HACA maa
Texas VFW AAK
Any Baby Can MAA
St. Austin's ASM
Travis County TO



Discount Steering Committee
Weatherization Decision Points



HEAP is limiting the average expenditure to \$5,500 per home. For CAP homes it was decided that the DSC as a committee can approve a premise expenditure of more than \$5,500 to ensure an outside party is making the final decision.

Meals On Wheels JB
Caritas SC SC maa
HACA maa
Texas VFW AKL
Any Baby Can AKL
St. Austin's PSM
Travis County TO

February 14, 2013

It is the decision of the DSC that refrigerators and other major appliances be eligible for replacement in the weatherization process. For CAP customers to receive appliances though they must first complete the education component.

Meals On Wheels JB
Caritas SC SC maa
HACA maa
Texas VFW AKL
Any Baby Can AKL
St. Austin's PSM
Travis County TO

It is the decision of the DSC that all customers participating in the program fill out an agreement for CAP weatherization. A person agrees to attend the education component, full weatherization of their home and meet kWh requirements.

Meals On Wheels JB
Caritas SC SC maa
HACA maa
Texas VFW AKL
Any Baby Can AKL
St. Austin's PSM
Travis County TO



Discount Steering Committee
Weatherization Decision Points



It is recommended priority be given to households that have 4 months of usage over 2,500 kWh. Second priority will be given to households with 6 months of usage between 1,500 and 2,500 kWh. Time will be measured in a rolling year. Customers must also agree to 18 months of follow up.

Meals On Wheels JP
Caritas sc ma
HACA ma
Texas VFW AA
Any Baby Can MA
St. Austin's PM
Travis County SO

March 27, 2013

It was decided there needs to be an exception to a customer living at the premise for 12 months in order to participate in weatherization. If the customer has lived at the premise for less than 12 months but meets one of the usage requirements, s/he may qualify.

Meals On Wheels JP
Caritas sc ma
HACA ma
Texas VFW AA
Any Baby Can MA
St. Austin's PM
Travis County SO

May 13, 2013

The DSC agrees that up to 2 appliances can be replaced. The priority follows: 1) refrigerator, 2) washing machine, 3) dryer, 4) stove and 5) dishwasher.

Meals On Wheels JP
Caritas sc ma
HACA ma
Texas VFW AA
Any Baby Can MA
St. Austin's PM
Travis County SO



Discount Steering Committee Weatherization Decision Points



August 14, 2013

We run into issues the first year with weatherization not starting until October, because it will appear far fewer homes are in the weatherization process although many will have started but not completed within fiscal year 2014. It is the decision of the DSC committee that we only count homes that have completed weatherization for the fiscal year.

Meals On Wheels JB
Caritas _____
HACA maa
Texas VFW AAK
Any Baby Can MM
St. Austin's BM
Travis County GO

Weatherization will begin in a priority zip code based on data segmentation reports and where the majority of identified homes fall. First priority will go to homes with 4 months worth of usage over 2,500 kWh. Second priority will be homes with 6 months of usage over 1,500 kWh.

Meals On Wheels JB
Caritas _____
HACA maa
Texas VFW AAK
Any Baby Can MM
St. Austin's BM
Travis County GO

It is the decision of the DSC to limit weatherization to homes valued under \$250,000. This does not include the property value.

Meals On Wheels JB
Caritas _____
HACA maa
Texas VFW AAK
Any Baby Can MM
St. Austin's BM
Travis County GO



Discount Steering Committee Weatherization Decision Points



November 13, 2013

Everyone agreed on the cap of \$8,700 as these are baseline resources (\$6,000 BSS+, \$1,200 CEAP and \$1,500 Plus 1); any customer with a balance higher than \$8,700 will not be considered for weatherization unless they bring account below the \$8,700 threshold but may be eligible for the arrearage program under development or other measures that could curtail their usage and prevent them from being further in the arrears. Once a customer successfully completes the arrearage program or agrees to curtail their usage by a mutually agreed upon measure they can then take part in weatherization.

Meals On Wheels JB
Caritas JC
HACA ma
Texas VFW AAZ
Any Baby Can MM
St. Austin's PSM
Travis County SO

Issues arise for accounts set up under the landlord's name as to who should attend education class. It was decided that in these situations the utility services must be set up in the renter's name in order to receive weatherization.

Meals On Wheels JB
Caritas JC
HACA ma
Texas VFW AAZ
Any Baby Can MM
St. Austin's PSM
Travis County SO

Currently Austin Energy's Energy Efficiency Services department cannot weatherize homes that have been previously weatherized by AE in the last ten years. DSC members agreed eligible customers should still have energy audit conducted to see what else can be done to weatherize the home.

Meals On Wheels JB
Caritas JC
HACA ma
Texas VFW AAZ
Any Baby Can MM
St. Austin's PSM
Travis County SO



Discount Steering Committee Weatherization Decision Points



DSC members agreed that AE funds should not be used to make improvements to services that are not provided by COA Utilities.

Meals On Wheels JB
Caritas BC
HACA maa
Texas VFW AAE
Any Baby Can MAA
St. Austin's PSM
Travis County TO

January 15, 2014

Per the November 13, 2013, meeting the customer balance cut-off in weatherization program was \$8,700 – determined by the max amount of financial assistance available in the community. The DSC agreed to lower that amount to account for BSS+ average assistance amount of \$3,000, not the original \$6,000 assistance amount originally calculated. The balance cut-off is now \$5,700.

Meals On Wheels JB
Caritas BC
HACA maa
Texas VFW AAE
Any Baby Can MAA
St. Austin's PSM
Travis County TO

Members decided we should give customers 45 days to respond to Austin Energy regarding their interest in taking part in weatherization.

Meals On Wheels JB
Caritas BC
HACA maa
Texas VFW AAE
Any Baby Can MAA
St. Austin's PSM
Travis County TO



Discount Steering Committee Weatherization Decision Points



February 24, 2014

For CAP eligible weatherization customers who have tampering on their account, the DSC decided to treat those accounts like any other:

- If the customer is not held accountable for tampering then we can proceed with weatherization.
- If the customer is held accountable and pays full restitution (any usage during tampering period plus any fees associated with meter replacement), then they are eligible for weatherization.

Meals On Wheels JB

Caritas LC

HACA maa

Texas VFW AAZ

Any Baby Can MM

St. Austin's BSM

Travis County TO

In regards to homes found out of scope due to concerns with cleanliness, it was the decision that:

- If the resident is already receiving services from an agency, have them contact their case manager to see if they can assist in cleaning the home.
- If the resident is not receiving services, give them 30 days to clean the home, and then make a second home visit. If they have not cleaned sufficiently, they will be deemed out of scope until their account possibly re-appears on a future list. Then can be re-visited.

Meals On Wheels JB

Caritas LC

HACA maa

Texas VFW AAZ

Any Baby Can MM

St. Austin's BSM

Travis County TO



Discount Steering Committee Weatherization Decision Points



March 24, 2014

In regards to one premise with two or more dwellings and only one electric meter it is the decision of the committee that:

- If there is an active lease agreement (landlord situation) – the home is ineligible for weatherization.
- If no active lease agreement (family member resides in secondary property) – the home is eligible for weatherization as long as both sets of family members complete the education class.
- Max of two properties/dwellings per meter on the premise, anything over is ineligible.

Meals On Wheels JB
Caritas AC
HACA maa
Texas VFW AAK
Any Baby Can MM
St. Austin's BM
Travis County BO

May 19, 2014

It is the decision of the DSC that the new limit per home be \$7,700 an increase from the September 24, 2012 decision of \$5,500. The DSC understands this is a temporary increase due to the cumulative carry over from FY 2013 and we will have to re-visit this for FY2015. The DSC wants any home that is over \$7,700 to be reviewed by Austin Energy and brought to this level of funding from this point forward.

Meals On Wheels JB
Caritas AC
HACA maa
Texas VFW AAK
Any Baby Can MM
St. Austin's BM
Travis County BO



Discount Steering Committee Weatherization Decision Points



July 16, 2014

It is the decision of the DSC that if pest control issues are brought to our attention prior to any work being done in the home, it will be the responsibility of the homeowner or landlord to address the issue before moving forward. Referrals will be provided to help resolve the issues. If work has already started on the home, AE will address the pest control issue.

Meals On Wheels JB
Caritas AC
HACA maa
Texas VFW DR
Any Baby Can W
St. Austin's PM
Travis County TO

It is the decision of the DSC that wording be included to the eligibility guidelines that a home will not be weatherized if it will be sold within 6 months of the completion of the weatherization measures.

Meals On Wheels JB
Caritas AC
HACA maa
Texas VFW DR
Any Baby Can W
St. Austin's PM
Travis County TO

October 15, 2014

In regards to waiting 12 months before re-contacting customers to enroll in weatherization program

- DSC decision: customers who never entered the weatherization process can be re-contacted prior to 12 months.
- DSC decision: customers who entered the process but did not follow through must wait 12 months before Austin Energy reaches out to them again.

Meals On Wheels JB
Caritas AC
HACA maa
Texas VFW DR
Any Baby Can W
St. Austin's PM
Travis County TO



Discount Steering Committee Weatherization Decision Points



November 19, 2014

In regards to A/C and heating system tune-up, repair and replacement as well as refrigerator replacement being removed as weatherization measures for fiscal year 2015:

- The DSC recommends A/C and heating system tune-up, repair, and/or replacement as well as refrigerator replacement for CAP weatherization households who meet the following criteria.
 1. Households with a child 6 or younger
 2. Households with a resident 60 or older
 3. Households with a disabled resident
- In addition, A/C and heating system replacement should be an option for all eligible households who have one of the following conditions applicable to their premise.
 1. Units 10 years or older
 2. Units with heat strip heating
 3. Units not in working condition
 4. Units using R-22 Freon

Meals On Wheels JB
Caritas SC
HACA maa
Texas VFW AR
Any Baby Can RA
St. Austin's PM
Travis County JD