

**VALLEY CLEAN ENERGY ALLIANCE  
COMMUNITY ADVISORY COMMITTEE**

**Staff Report - Item 5**

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**TO:** Community Advisory Committee

**FROM:** Rebecca Boyles, Director of Customer Care and Marketing  
Sierra Huffman, Program and Community Engagement Analyst

**SUBJECT:** Electrification Retrofit Rebate Outreach Program (ERRO) Update, and Concierge Service Discussion and Action

**DATE:** March 28, 2024

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**RECOMMENDATION**

Staff requests that the CAC review and provide feedback on the Electrification Retrofit Rebate Outreach (ERRO) Program, as well as offer its recommendation to the Board to approve the Concierge Service.

**BACKGROUND**

The ERRO Program is a comprehensive outreach program in partnership with Yolo County to encourage low-income households to access \$1 billion in existing State electrification rebates, as well as other related electrification retrofit rebates for existing residential homes. Helping these households reduce ongoing energy-related costs by targeting direct outreach to them will have long-term economic as well as potential indoor air quality benefits.

**PROGRAM UPDATE**

The ERRO Program is designed to identify lower income households who have had difficulty paying their utility bills and provide support for accessing State electrification rebates. VCE will be monitoring rebate and grant opportunities as they emerge and change, to provide maximum support for customers.

VCE will work with Yolo County to reach out to households and/or landlords of multifamily dwellings to connect them with information about electrification rebates, help fill out applications, and help facilitate retrofits if needed. This project is anticipated to create replicable models for electrification retrofit rebate programs throughout the County, region, and state. The outreach program will provide template outreach materials which other jurisdictions could use to implement similar programs.

Contracting for the ERRO program has been completed, and outreach for the program is slated to commence April-June 2024, after finalizing the draft Outreach Plan. VCE plans to work with its incumbent marketing contractor REACH Strategies to minimize staff impact related to program execution.

During the planning phase, staff identified what could be a very important tool to help facilitate ERRO's success: the Concierge Service. Sacramento Municipal Utilities District (SMUD) has developed an add-on service for CCAs that provides a heightened customer experience, but adds in program-related education, as well as technical support. The customer could call, email or chat inquiries on a range of efficiency-related topics, as well as in-depth topics such as evaluating several contractor bids on electrification projects.

The SMUD team consistently earns high praise for VCE's Customer Care, and staff sees the Concierge service as a natural extension of that success. Customers may call in initially to ask about electrification, but end up having an in-depth conversation about their electric bills, or CCA in general, and the SMUD team will have all of this information at hand, as well as the ability to track the information in the customers' records for future program offerings. The Programs and Outreach Task Group (POTG) has evaluated the Concierge Service and has provided positive feedback on it as a tool for better customer service in general, as well as its suitability for the ERRO Program. Both ERRO and the Concierge service scored medium- to high-impact on the Program Implementation Criteria.

Because of the direct applicability of the Concierge Service to the ERRO program, Yolo County has agreed that part of the \$100,000 budget allotted to VCE for program administration can be spent on the Concierge Service.

#### **FISCAL IMPACT**

The ERRO Program would have a net-neutral effect on VCE's budget, as Yolo County would be providing \$100,000 in American Rescue Plan (ARP) funds to VCE for its portion of program execution. The Concierge Service would have an impact of \$55,000-\$105,000 on VCE's Program Budget (including a contingency in case of cost overruns).

#### **ATTACHMENTS :**

1. Program Preliminary Design/Implementation Form: ERRO
2. Program Preliminary Design/Implementation Form: Concierge Service



**Program Preliminary Design/Implementation Form**

**Program Concept: Electrification Retrofit Rebate Outreach (ERRO) Program**

**Date:** 2.22.24

**Staff Resources and Support:**

Assigned Program Managers: Rebecca Boyles; Sierra Huffman

Programs Task Group members: TBD

Consultant name (if applicable): REACH Strategies and SMUD

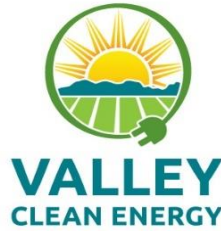
**Scope:** A program to reach out to low-income customers and provide them with access to, and technical assistance for, electrification and efficiency rebates

**Timing:** 2022-2024

**Program Design Criteria Evaluation:**

	Criteria 1	Criteria 2	Criteria 3
Criteria Type	Availability of Funds:	Staff Time	Strategic Plan Alignment
Reasoning for Program Score	This program brings in funds and has a new neutral effect on the budget.	Scored high on Staff Time as it will take some time, but not very much, for staff to manage	<u>Scored high on strategic plan alignment:</u> <b>Reduces GHG Emissions</b> More efficient and electrified homes would lead to less emissions <b>Customer Satisfaction</b> Customers will get complimentary access to rebates on EE and electrification, making their homes more comfortable and sustainable. <b>Addresses Environmental Justice</b> Addresses the needs of lower-income customers by making EE and electrification more accessible <b>Regulatory &amp; Legislative Goals Alignment</b> Aligns with state goals of increasing EE and electrification in CA <b>Strategic Partnerships</b> High level of collaboration with Yolo County, low-income communities, community-based organizations, and additional stakeholders

**Program Metrics and Goals:**



Performance Measures Framework	Outcome Measure	Data Tracking Frequency	Outcome Link to ARP Narrative
How much did we do?	Number of people reached	Quarterly	Measure E-2: Reduce Energy Consumption in Existing Residential and Non-Residential Buildings of the <i>Yolo County Climate Action Plan</i>
How well did we do it?	Number of existing homes converted to all electric	Quarterly	Measure E-2: Reduce Energy Consumption in Existing Residential and Non-Residential Buildings of the <i>Yolo County Climate Action Plan</i>
Is anyone better off?	Associated greenhouse gas reduction quantification	Quarterly	Measure E-2: Reduce Energy Consumption in Existing Residential and Non-Residential Buildings of the <i>Yolo County Climate Action Plan</i>

**Proposed Programs Budget:**

Resource	Source	Budget	\$ Remaining in Program Funds
Staff time	ARP Funds (external)	\$25,000-75,000	n/a
Consultant Support (inc. Concierge Service)	ARP Funds (external)	\$25,000-75,000	n/a
	<b>Total</b>	<b>\$100,000</b>	<b>\$839,000</b>

**Organizational Goals Addressed:**

Alignment with VCE's Strategic Plan

- **Goal 3:** Prioritize VCE's community benefits and increase customer satisfaction and retention.
  - **Objective 3.1:** *Develop engagement strategies to increase awareness of, and participation in, local control of VCE's energy supply and programs with a particular focus on engaging disadvantaged and historically marginalized communities.*



- **Objective 3.4:** Build awareness and trust of the VCE brand through direct engagement with customers, communities, and organizations in VCE's service territory.
  - **Objective 3.5:** Develop customer programs and initiatives that prioritize decarbonization, community resiliency and customer savings.
  - **Objective 3.7:** Integrate and address the concerns and priorities of emerging and historically marginalized communities in the design and implementation of VCE's services and programs.
- **Goal 4.** Promote and deploy local decarbonization and grid innovation programs to improve grid stability, reliability, community energy resilience, and safety
    - **Objective 4.4:** Identify external funding sources to support decarbonization and grid-related programs and initiatives.

**Program Eligibility:** Low-income customers and customers that had trouble paying their bills during COVID

**Marketing, Education and Outreach (ME+O) Strategy:** Work with REACH to devise collateral, website, and FAQs for customers. If approved, use Concierge service to promote the program, as well as to provide technical support.

**Board, CAC, POTG Input:** POTG has evaluated and provided positive feedback. Program was approved by the Board.

**Next Steps:** Finalize budget share of Concierge Service and ERRO Outreach Plan.



**Program Preliminary Design/Implementation Form**

**Program Concept: Concierge Service**

**Date:** 2.22.24

**Staff Resources and Support:**

Assigned Program Managers: Rebecca Boyles; Sierra Huffman

Programs Task Group members: TBD

Consultant name (if applicable): SMUD

**Scope:** A “white glove” customer care service that will help customers to better understand and apply for available rebates for electrification and energy efficiency. SMUD Customer Care Team would take the calls/chats/emails and would also be able to answer questions about billing, etc.

**Timing:** 2024 and beyond

**Program Design Criteria Evaluation:**

	Criteria 1	Criteria 2	Criteria 3
Criteria Type	Availability of Funds:	Staff Time	Strategic Plan Alignment
<b>Reasoning for Program Score</b>	There are available funds to initiate and continue the program without having a big effect on the Programs Fund. Additionally, APR funds for the ERRO program can cover part of the budget.	Scored high on Staff Time as it will take very little staff time to manage	<u>Scored high on strategic plan alignment:</u> <b>Reduces GHG Emissions</b> More efficient and electrified homes would lead to less emissions – this will help customers to do that <b>Customer Satisfaction</b> Customers will get complimentary access to information on rebates for EE and electrification, making their homes more comfortable and sustainable. <b>Addresses Environmental Justice</b> Addresses the needs of lower-income customers by making EE and electrification more accessible <b>Regulatory &amp; Legislative Goals Alignment</b> Aligns with state goals of increasing EE and electrification in CA <b>Strategic Partnerships</b> High level of collaboration with SMUD, low-income communities, community-based organizations, and additional stakeholders

**Program Metrics and Goals:** Number of customers served, number of rebates applied for or assisted with



**Proposed Programs Budget:**

Resource	Source	Budget	\$ Remaining in Program Funds after Proposed Program Funds Spent
External Funds	ARP funds for ERRO	\$25,000-75,000	
SMUD Consultant Support: Concierge Service	VCE Programs Fund	\$55,000-\$105,000	
	Total*	\$130,000	\$709,000

*\*Please note that the total budget is to implement the Concierge Service, and for the year 1 fees. For subsequent years, the charge would be approximately \$40,000.*

**Organizational Goals Addressed:**

Alignment with VCE’s Strategic Plan

- **Goal 3:** Prioritize VCE’s community benefits and increase customer satisfaction and retention.
  - **Objective 3.1:** Develop engagement strategies to increase awareness of, and participation in, local control of VCE’s energy supply and programs with a particular focus on engaging disadvantaged and historically marginalized communities.
  - **Objective 3.4:** Build awareness and trust of the VCE brand through direct engagement with customers, communities, and organizations in VCE’s service territory.
  - **Objective 3.5:** Develop customer programs and initiatives that prioritize decarbonization, community resiliency and customer savings.
  - **Objective 3.7:** Integrate and address the concerns and priorities of emerging and historically marginalized communities in the design and implementation of VCE’s services and programs.
- **Goal 4.** Promote and deploy local decarbonization and grid innovation programs to improve grid stability, reliability, community energy resilience, and safety
  - **Objective 4.4:** Identify external funding sources to support decarbonization and grid-related programs and initiatives.



**Program Eligibility:** all VCE customers. For ERRO, low-income customers are key demographic.

**Marketing, Education and Outreach (ME+O) Strategy:** Work with SMUD to devise customer-facing materials. If approved, use Concierge Service to promote the ERRO program, as well as to provide bill inquiry and general CCA support.

**Board, CAC, POTG Input:** POTG has evaluated and provided positive feedback. Service was introduced to the Board, with positive feedback.

**Next Steps:** Finalize budget share of Concierge Service.