

Assisted Home Performance with ENERGY STAR® and EmPower New York Coordination and Referral Guidelines

May 31, 2013

Agenda

- Overview of EmPower New York
- Customer Referrals to EmPower
- Coordination of Assisted Home Performance with ENERGY STAR and EmPower
- Q&A

Overview

- Households with incomes at or below 60% of the State median income (i.e. HEAP eligible) are eligible for services through both EmPower and AHPwES.
- EmPower provides energy efficiency services at no cost to income eligible households. EmPower is administered by NYSERDA with implementation services provided by Honeywell.
- Since AHPwES/EmPower guidelines were announced on March 21, 2013 more than 250 AHPwES applications have been received with customers eligible for EmPower.

Referral Process

Customer Applied for an AHPwES Subsidy

- A household that applies to EFS for an Assisted Subsidy will be screened for income eligibility for EmPower.
- If EFS determines that the household is EmPower eligible, EFS will:
 - Send an email to the customer and contractor notifying them of possible EmPower eligibility
 - Refer household to Honeywell for services through EmPower.
 - » Honeywell will review of previous participation through EmPower that could disqualify customer.
 - » EmPower energy usage threshold requirement is waived.
 - If an Assisted contractor was in contact with the customer, EFS will provide the name of the contractor to Honeywell and Honeywell will assign EmPower work to this contractor when feasible and appropriate.
- The Assisted Subsidy Application will be accepted by Honeywell. A separate EmPower NY application does not need to be submitted.

Referral Process

Customer Applied for an AHPwES Subsidy

- If the customer is determined to be eligible for EmPower and the contractor is not an EmPower contractor, the contractor may apply to the program and be assigned the customer.
 - Notify NYSERDA of the intent to apply and submit an application.
 - If the contractor is in good standing with HPwES, work can proceed while the application is being processed.
 - Payment cannot be made until after EmPower application is approved.
 - If the contractor is unwilling to work through EmPower, the customer will be assigned to a participating EmPower contractor.

Referral Process

Customer Applied for an AHPwES Audit

- If the customer has indicated HEAP eligibility on an audit application, CSG will process as usual. Customers will be informed that HEAP eligible households may be eligible to receive free services through EmPower.
- Contractors should review the application and/or award letter; if they note that the HEAP box is checked, or if you believe the household is HEAP-eligible, complete the audit according to section 3.0 of the Coordination Guidelines.

Referral Process

Referrals from Other Organizations

- Referrals from Offices for the Aging and Weatherization agencies of HEAP eligible households must be directed to EmPower.
- GJGNY CBOs may only refer a household to one of the two programs.
 - If the GJGNY CBOs can confirm that the household is HEAP eligible, the household will be referred to EmPower.
 - In all other instances the household will be referred to Home Performance with ENERGY STAR.

Referral Process

Coordination with Honeywell

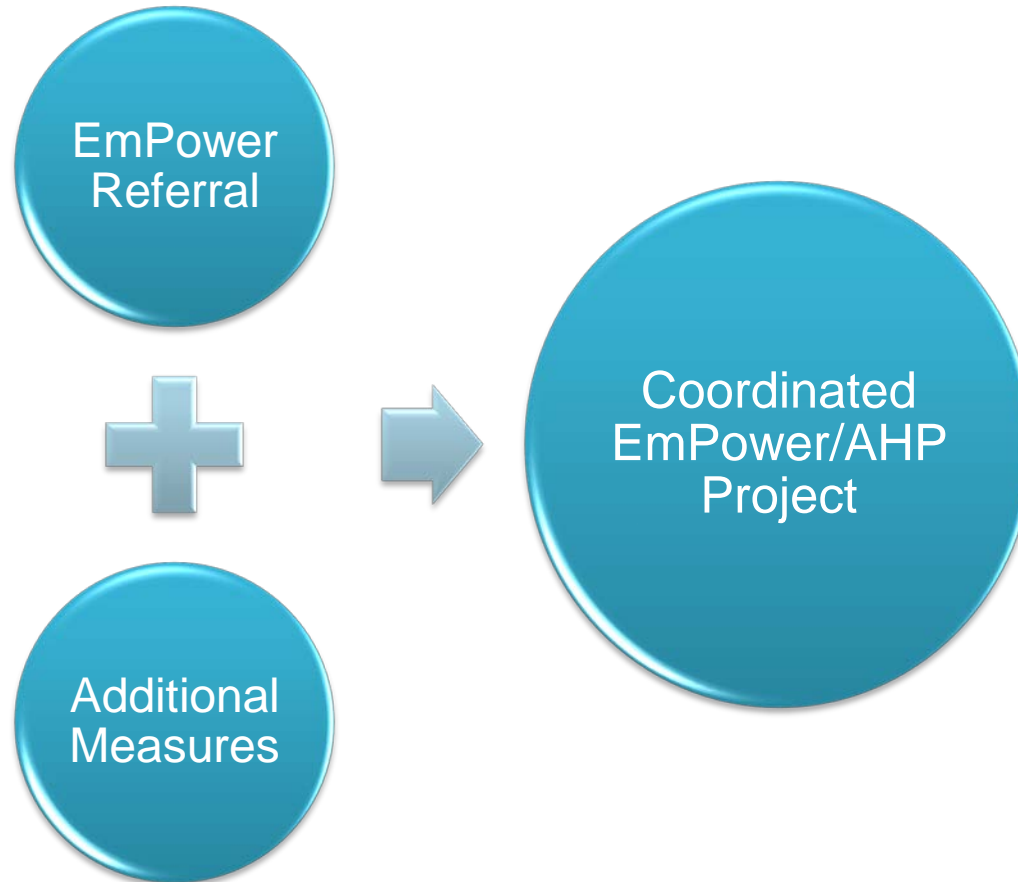
- If EmPower-eligible, Honeywell will send a letter to the household notifying them of the free services through EmPower. If no Assisted or EmPower application has been received, Honeywell will send an EmPower application to the household.
- If the household cannot be served by EmPower for any reason, Honeywell will refer the household to Assisted by sending a letter to the customer with information about Assisted. EFS, CSG, and NYSERDA will also be notified.

Referral Process

Payment Process

- The EmPower invoice process is detailed in the EmPower manual.
- Any refund of a down payment due to the customer must be noted on the invoice.

AHP/EmPower Coordination Process



AHP/EmPower Coordination Process

- If a household needs additional services, or expresses an interest in measures beyond EmPower, the project can be coordinated with AHPwES and EmPower.
 - If the contractor participates in both programs, the project can proceed with that contractor.
 - Measures paid for and provided through EmPower must follow the current EmPower pricing as outlined in the Contractor Agreement.
 - Measures receiving an AHP subsidy are subject to the HPwES program rules.
 - If the customer is determined to be eligible for EmPower and the contractor is not an EmPower contractor, the contractor may apply to the program and be assigned the customer.

AHP/EmPower Coordination Details

Energy Audit & Modeling

- The modeling tool must be approved by HPwES (TREAT, RHA). Contractors will submit modeling data to the HPwES program following current procedures.
 - The SIR calculation in HPwES approved software is used for the EmPower measures too. There is no need to remodel in EmPCalc.
- If the customer is approved for EmPower, measures typically performed at the audit (ER) may be installed. However, no commitments to additional work, and no additional work may be performed, without written prior approval from both Program Implementers.

AHP/EmPower Coordination Details

Incentives

- For single-family homes the combination of EmPower funding and 50% NYSERDA subsidy for Assisted measures may be no greater than \$13,000 for a single family home, as follows:
 - \$8,000 from EmPower
 - \$5,000 Assisted 50% subsidy

AHP/EmPower Coordination Details

Assisted Home Performance and EmPower New York
Combined Subsidy Amounts for 1-4 Unit Properties

# of Income Eligible Tenants	Funding Source	Total Number of Building Units			
		1	2	3	4
4	Assisted				50% up to \$10,000
	EmPower				\$ 16,000
	Maximum				\$26,000
3	Assisted			50% up to \$10,000	45% up to \$9,000
	EmPower				\$ 16,000
	Maximum				\$26,000
2	Assisted		50% up to \$10,000	40% up to \$8,000	30% up to \$6,000
	EmPower		\$ 16,000	12800	9600
	Maximum		\$26,000	\$20,800	\$15,600
1	Assisted	50% up to \$5,000	30% up to \$4,500	20% up to \$4,000	15% up to \$3,000
	EmPower	\$8,000	\$ 7,200	\$ 6,400	\$ 4,800
	Maximum	\$13,000	\$11,700	\$10,400	\$7,800

*If a unit is owner occupied, and the owner is income-eligible for both programs, the owner qualifies for \$5,000 from Assisted and \$8,000 from EmPower. Measures may be installed anywhere in the building without additional income eligible households.

In all other situations, the energy efficiency improvements are limited to those that benefit the income eligible household.

AHP/EmPower Coordination Details

Measure Eligibility

EmPower-funded eligibility:

- Energy efficiency measures: must have SIR greater than 1.0
- Health and safety measures: approved by EmPower Program Implementer
- All measures funded through EmPower must be provided at EmPower contractor pricing

Assisted 50% Incentive Eligibility:

- Assisted Incentive/No Loan
 - » Energy efficiency measures listed on the prequalified measures list, no subsidy for health and safety measures
- Assisted Incentive/Smart Energy Loan
 - » Energy efficiency measures listed on the prequalified measures list
 - » Loan may include up to 15% of the Assisted project value for other eligible measures, accessories, or health and safety
 - » The energy savings of the combined work scope determines loan eligibility
- Assisted Incentive/On-Bill Loan
 - » The total loan obligation must be less than the estimated savings from all measures over the expected life of the improvements. The monthly loan installment payments may not exceed 1/12th of the estimated average annual energy savings over the term of the loan.

AHP/EmPower Coordination Details

Submission of Work Scope

- The contractor receives determination of eligibility for both EmPower and Assisted work from HPwES Program implementer. The contractor must then propose to the household the option of either:
 - A more limited work scope through EmPower; or
 - A more comprehensive work scope that includes funding from AHP
- The contractor must clearly advise the household that the services provided through EmPower are at no cost to the household, and with no obligation to proceed with the Assisted measures;
- The customer must then choose whether to proceed with one or both work scopes; and
- The contractor must then notify both Program Implementers of the final decision by household.
 - If the customer indicates a lack of interest in partially-funded measures, contractor will proceed according to EmPower guidelines.
 - If the customer indicates an interest in both programs the Contractor will complete work accordingly and provide each Program Implementer with appropriate program documents and invoices.

AHP/EmPower Coordination Details

Submission of Work Scope

- Combined EmPower and Assisted work scope must be submitted to the HPwES Program Implementer for review. CSG will:
 - Review the proposed work scope with the goal of maximizing the customer benefit. Generally this will require that the work scope distribute high and low payback measures between the programs.
 - Obtain approval from the EmPower Program Implementer for EmPower measures.
 - Once approved, the HPwES Program Implementer will notify the contractor.
- Projects referred to EmPower from AHPwES will be approved as HP EmPower jobs and not transferred to an Electric Reduction EmPower job.

Tips

- Give as much detail to the programs as possible up front.
- Break out measure and cost details.
- For heating system only upgrades, provide details about proposed shell measures (unless a no heat emergency).

Tips

- As a contractor, you can help the customer reach the best program for their needs. You may consider asking the household a few questions during your initial discussions with them.
 - “Is your gross monthly income less than...?”
 - “Are you currently receiving HEAP or food stamps?”
- Never promise free services through EmPower.

Contact Information

CSG

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Honeywell

- Carol Sweeney, Carol.Sweeney@honeywell.com, 1-800-263-0960

NYSERDA

- David Friello, DAF@nyserda.ny.gov, 518-862-1090 ext. 3355
- Laura Bunzey, LB2@nyserda.ny.gov, 518-862-1090 ext. 3446

EFS

- Dan Streit, DanS@weccusa.org, 800-361-5663 x350

Q & A

Thank you for attending this webinar.

At this time we will take a few minutes to review questions you have submitted and then will be back to provide responses.

Example Question Box →
Please enter your question in the text box and click Send.

