

Energize ConnecticutSM

Community Partnership for Energy Efficiency Engagement Initiative

Round 1 Application for Interested Parties

Applications Open: June 8, 2021

Applications Deadline: July 2, 2021

The Connecticut electric and natural gas utilities (Eversource, United Illuminating, Connecticut Natural Gas, and Southern Connecticut Gas), as sponsors of Energize Connecticut, are committed to work with community outreach groups affiliated with a municipality, such as Energy Task Forces, and community outreach groups unaffiliated with a municipality, to reach residents and businesses with energy efficiency programs and offers in support of efforts by the Utilities for a broader reach of energy efficiency engagement and program participation across the state through the Community Partnership for Energy Efficiency (Partnership). The goals of the Partnership work in concert with joint 2019-2021 Conservation & Load Management Plan goals and in turn with Energize Connecticut, an initiative of the Connecticut Energy Efficiency Fund, the Connecticut Green Bank, the State of Connecticut, and Connecticut's natural gas and electric utilities, which was created to empower Connecticut to make smart energy choices, both now and in our future. Funding support for Energize Connecticut derives from a charge on customer energy bills.

The Partnership seeks to leverage the local knowledge, trusted relationships, and experience of local community groups, nonprofit organizations, and municipalities who are committed to raise awareness and measurable participation in the Utilities' energy efficiency offerings within their own communities. The Partnership desires to emphasize outreach to the following select groups: customers within a distressed community or census block, residents with limited English proficiency, low-and moderate-income customers, renters in single family homes or multifamily buildings up to 4 units, and small businesses. The Partnership does not replace current and future residential and small business marketing in Connecticut by the Utilities, but rather aims to provide another layer of marketing and outreach to customers in the select groups mentioned above.

To aid the Partnership's goal of increased awareness and measurable participation in energy efficiency incentives and programs¹ offered by the Utilities, the Utilities are soliciting applications from community groups, nonprofit organizations, and municipalities willing to team up with the Utilities to join the Partnership and receive funding for energy efficiency outreach efforts. The Utilities strongly encourage organizations and municipalities to partner together on their application and subsequent grassroots organizing, public education, and engagement activities for the period of **August 2, 2021 through July 29, 2022**. The Utilities also plan to coordinate a kickoff meeting, periodic calls and best practices trainings for participants in the Partnership. Accepted applicants will receive initial seed funding upon signature of the participation memorandum of understanding (MOU) and the commencement of the program period, with further funding contingent on sustained efforts, required milestones, and goal achievement.

Submission of this completed application indicates agreement in the terms subsequently outlined in the next several pages. Incomplete applications will not be considered. Please contact [Devan Willemssen](#) with any questions before **noon on June 25, 2021**. Questions received after that date will not receive a response to ensure equity and remove partiality amongst applicants. An informational webinar regarding the Partnership's goals and application will be held on **June 16, 2021 at noon and again at 7:00 p.m.**

¹ Please see Appendix A for a list of energy efficiency incentives and programs we encourage participants to champion in their community.

Community Partnership for Energy Efficiency Outreach Participation Requirements and Details

Who Can Apply and Participate in the Community Partnership?

Community groups, nonprofit organizations, and municipalities located within the state of Connecticut and the Utilities' service area are encouraged to apply. The Utilities strongly encourage partnerships within these categories, where possible. For example, an application that is jointly submitted by the town of Smithville² and its citizen-run Energy Task Force would be welcomed. Another example would be an application submitted together by a local community action agency and the town of Smithville.

Municipalities and non-profit organizations are also welcomed to submit applications without a partner; however, joint applications are encouraged.

Regardless of the entity applying, a letter of support on municipal letterhead from the municipality where the planned outreach will take place is strongly encouraged to be submitted with an application, but not required. If the outreach will encompass more than one town, letters of support from each municipality that the applicants desire to perform outreach are strongly encouraged, although, for Round 1 of the Partnership, the Utilities strongly encourage applicants to focus their outreach on a single municipality.

Additional Application Guidelines

- Applicants will designate a lead point of contact (POC) for each entity involved with each application. For example, the application that is jointly submitted by the town of Smithville and its citizen-run Energy Task Force would include a POC for the town of Smithville and a POC for the Energy Task Force or Committee. The alternate example of the local community action agency and the town of Smithville would also include a POC for the community action agency and a POC for the town of Smithville.
 - Municipal POCs must be the Mayor, Town Manager, First Selectman, Town Administrator, or Energy Manager.
 - Nonprofit organization POCs must be a full-time staff member
 - Community groups, such as energy task forces or congregations, must appoint a leader to serve as the POC.
- Program participation period consists of one (1) year, commencing on the award date.
- The application must indicate a single fiduciary agent. Funding can only be awarded to a municipality or a 501c3 designated organization with a Federal Tax ID. Individuals are not eligible to solely qualify as a Partnership participant or as a recipient of funding without affiliation with a qualified organization. If an Energy Task Force partners with its municipality, then the municipality would act as the fiduciary agent. If a 501c3 organization partners with a municipality, then it is up to the discretion of the parties to decide where fiduciary agency lies.

What Are the Benefits of Participating in the Community Partnership?

Once an application is reviewed and deemed qualified for acceptance into the Partnership, Utilities' staff will notify the applicants of their approval. Once the MOU is signed, the Partnership participants will receive their seed funding. If an organization is acting as a fiduciary agent, the fiduciary agent organization will need to invoice for the seed funding amount. The seed funding amount will correlate to the goal the participants chose to pursue and will be used for costs associated with their energy efficiency outreach plans, set up, and first six months of effort. Halfway through the grant cycle, recipients will have

² Fictitious municipality created for the purposes of an example.

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a progress review with Utilities staff and upon receipt and documentation of program results to date, the participants will then receive a remaining percentage of their grant award less the 15% allocated for successful completion of required milestones. High achieving projects may be eligible for further funding, based on results and demonstrated need within the project period of Round 1.

Partnership participants will be eligible for funding that are based generally on the population of the community where the outreach will take place as well as the number of households or businesses the project aims to reach. Proposed projects should reach at least 200 to 500 households and a minimum of 5 and a maximum of 30 unique participating businesses per community. Funding awards will be based on the project submitted on the application. Funding awards will range from \$5,000 to \$25,000.

Note that awards for municipalities with residents living in designated high-need communities, as defined by the Connecticut Department of Economic and Community Development (DECD) as a distressed municipality will be 20% higher. These areas are defined as municipalities or U.S. Census blocks with high concentrations of unemployment and poverty, aging housing stock and low or declining rates of growth in job creation, population, and per-capita income. The DECD list of distressed municipalities is revised each year and for the purposes of the Partnership we will accept distressed communities from calendar year 2017 onward. For example, if Smithville is a distressed community identified in the DECD list for 2020 and the base project award is \$15,000, then their total award will be \$18,000. (Consult the DECD list available at: <https://portal.ct.gov/%20DEEP/Environmental-Justice/Environmental-Justice-Communities>).

Additional Resources Offered to Partnership Participants

Partnership participants will receive additional support from the Utilities, including but not limited to:

- A designated Utility staffer as POC.
- An orientation session, including an introductory training on energy efficiency programs.
- Energize Connecticut and Utility-specific marketing materials (brochures, talking points, presentations, newsletters, and digital communications, etc.) promoting the Utilities' energy efficiency programs, directing customers to 877-WISE-USE or online lead forms.
 - The Utilities can provide participants with talking points, brochures, presentation slides related to the goals of the Partnership. The Utilities will advise on and/or contribute to any items the participants might create and distribute. These items may include newsletters, brochures, flyers, and other communications.
 - Collateral may be co-branded with Energize Connecticut, sponsoring Utility(ies), municipal seal, or logo of the community group.
- Periodic information regarding individual progress against toward their specific goals.
- Periodic conference calls to discuss outreach, celebrate successes, share challenges, and best practices to address barriers to achieve greater energy efficiency program participation.

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How Can Partnership Participants Earn Funding? 

Partnership participants can earn funding beyond their seed funding (\$2,000 or 30% of their total financial eligibility) by achieving milestones outlined below. For Round 1, applicants can choose only one of the following goals to pursue during the project period.

Seed Funding (Percentage of Available Funding Awarded at the Beginning of the Grant Period)	Remaining Funding Awarded Halfway Through the Grant Period After a Progress Review	Program Goals
20%	65%	Goal 1: Demonstrating actions that will lead to a 10% increase in homes participating in Home Energy Solutions SM (through the municipality’s Energize CT Utility sponsor).
30%	55%	Goal 2: Demonstrating actions that will lead to a 5% increase in homes participating in Home Energy Solutions-Income Eligible (through the municipality’s Energize CT Utility sponsor).
20%	65%	Goal 3: Demonstrating actions that will lead to a 15% increase in the number of rebates submitted for a Residential insulation and/or heat pumps replacing electric resistance heat. (These are rebates through the municipality’s Energize CT Utility sponsor).
20%	65%	Goal 4: Demonstrating actions that will lead to a 5% increase in the number of small businesses participating in the Small Business Energy Advantage program and municipal buildings that participate in the Utilities’ energy efficiency programs with an increase of a minimum of 5 and a maximum of 30 unique participating businesses.

** An “increase” is considered an increase over the average of 2017-2019 participation by municipality. Each municipality will receive details on their average 2017-2019 participation prior to beginning their outreach activities. Historical participation (by municipality) can also be tracked on the Energize CT Dashboard: <https://www.ctenergydashboard.com/CEC/CECTownData.aspx>.*

Participants are required to create a program plan and outreach strategy in addition to submitting monthly reports and participation in periodic calls and meetings. Participants are eligible to receive a percentage of funding once they successfully complete these required milestones throughout the entire program period.

Percentage of Total Funding Awarded	Required Milestones
15% (Awarded in the last month of the grant period upon successful completion)	<ul style="list-style-type: none"> • Participation in periodic calls and submission of a brief monthly outreach report to the Utilities to track progress toward goals laid out in the engagement plan, including any barriers to program participation noted in the community. • Demonstrate follow through, over the course of the grant period, on the participant’s marketing and outreach plan to encourage participation in Utility energy efficiency programs, especially those related to their selected goal.

Participants can earn a bonus award for achieving their selected goal. This is a bonus payment that is allocated on top of their total funding possible.

Bonus Award	Achieved Goal
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10% of total funding possible	<ul style="list-style-type: none">• Achievement of selected Goals 1-4 outlined above
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How Can the Participants Attain Partnership Goals?

In the “Evaluation Process” section in the application, applicants should outline specific outreach methods and efforts that they plan to implement as part of their outreach in the Partnership. Municipal applicants should describe the role of any local community-based organizations in their efforts, including any organizations they are partnering with on this application.



Examples of potential outreach methods include:

- Creating videos and interviews with municipal officials and other local leaders promoting energy efficiency programs.
- Partnering with large employers to reach employees who live in the municipality.
- Hosting virtual coffee hours for small landlords and property managers.
- Co-sponsoring events or webinars/workshops with local small business associations.
- Engaging with municipal community development, public works, etc. (e.g., piggybacking on department of water bill inserts and use of local assessor’s data)
- Collaborating with local community-based organizations and faith-based groups in the community to build trust and awareness about Energize CT energy efficiency programs among residents and ensure effective outreach to multilingual residents.
- Holding open houses hosted by local community members and small businesses to showcase energy efficiency upgrades and technologies, (when safe to do so).
- Partnering with schools and student/parent groups and collaborating with the Utilities’ K-12 Energy Education curriculum, professional development, and outreach programming.

What Will Be the General Responsibilities of Partnership Participants?

- Ensure fiscal transparency by providing the Utilities with a breakdown of how funding disbursements will be spent. Budgets will need to be signed off by participating organizations and fiduciary agents and the Utilities will provide feedback on each budget proposal prior to disbursement of funds.
- Provide monthly outreach progress summaries, including data collection on number of residents and/or businesses in each target group being reached and any barriers and successes to program participation that your outreach efforts have revealed.
- Attend a mandatory introductory training on targeted energy efficiency program offerings and best practices in marketing and community outreach. Any outreach materials developed for the purpose of the Partnership must be reviewed and approved by the Utilities prior to public distribution.
- Participate in periodic calls with the Utilities and the other participants in the Community Partnership.
- A final report (1-3 pages) on progress at the end of the year (due within ten (10) business days after the close of the grant award period). In addition to the final report for Round 1 activities, Partnership participants must fill out a brief survey on how the award funding has or will be spent and how they would like to stay engaged with the Utilities regarding energy efficiency programs after their Partnership participation year concludes.
- As part of the Partnership with the Utilities, any marketing materials developed by the participant must direct customers to the vendors directly contracted with the Utilities to implement those programs, a Utility online lead form or application, or 1-877-WISE-USE. All customers who reside in, or property managers/building owners of, a multifamily building with 5 or more units should contact 1-877-WISE-USE.

What is the Application Process?

Interested applicants should complete the application form included in this document. The form is fillable and will expand as you type. Responses to open-ended questions should be formatted in bulleted lists, rather than narratives wherever possible. If you have questions about the application process, please attend the applicant webinar which will be held on **June 16, 2021 at Noon and 7:00 p.m.** or reach out to Devan Willemsen at devan.willemsen@eversource.com.

Applications must include the following:

- A completed and signed application form. Please answer all questions. Incomplete applications will not be considered.
 - The application requires supplemental documentation including a copy of a W-9, project budget, identified fiduciary agent, among other project strategy details. It is recommended that applicants review the form well in advance to filling out their responses.

Applications are also strongly encouraged to include the following:

- An official letter of support from the Mayor, Town Manager, First Selectman, Town Administrator, or Energy Manager representing the municipality where the project work will take place.
- Memorandum of understanding (MOU) agreements between cooperating parties, especially those submitting joint applications.
- Other supporting documentation that supports their project. Please limit this to no more than five (5) items for a total of ten (10) pages.

How Will Applications Be Evaluated?

Community groups, nonprofit organizations, and municipalities located within the state of Connecticut and the Utilities' electric service area are encouraged to apply. Selection of the proposals will be made by the Utilities based upon the following criteria: Application completeness and quality; ability to achieve the selected Partnership goal; relevant experience and strength of ties in the target community; and target community energy efficiency savings potential. Geographic, economic, and demographic diversity of the target municipality will also be given special attention, including:

- Target municipality has a below-average historic participation in Utilities' energy efficiency programs; and
- Target municipality has high concentrations of renters and low- and moderate-income customers, based on U.S. Census data.

It is important to note that while applications must be complete to be considered, submitting a complete application does not guarantee funding.

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Tentative Project Schedule

Key Activity	Date
Applications Open	June 8, 2021
Informational webinar with the Utilities for interested applicants	June 16, 2021, Noon & 7:00 p.m.
Questions closed	June 25, 2021
Applications due	July 2, 2021
Proposed Project Meetings with Applicants	July 7 to July 16, 2021
Selected communities notified (via phone and email)	July 21, 2021
Participant MOUs signed and returned (via electronic signature)	July 30, 2021
Round 1 activity start date	August 1, 2021
Mandatory orientation and training meeting with each participant	August 2-August 10, 2021
Seed funding (20-30% depending on goal) disbursed*	August 2, 2021
End of Q1 meetings	October 25-29, 2021
Halfway mark meetings	January 24-28, 2022
Remaining goal funding (55-65% depending on goal) disbursed	January 24-31, 2022
End of Q3 meetings	April 25-29, 2022
Required milestones funding disbursed	June 27-July 1, 2022
Round 1 activity end date and final project debrief meetings	July 30, 2022; July 25-29, 2022
Final project reports due	August 12, 2022

* MOU must be signed prior to submitting an invoice for seed funding.

APPLICATIONS MUST BE COMPLETE TO BE CONSIDERED.

DISCLAIMER: The Utilities may terminate a municipality's or community group's participation in the Community Partnership for Energy Efficiency Outreach if the Utilities determine the municipality or community group is not demonstrating a good faith effort to reach the Minimum Participation Requirements. The Utilities may, in their sole discretion, at any time and without notice, terminate the municipality's or community group's participation in the Community Partnership for Energy Efficiency Outreach or modify the Community Partnership for Energy Efficiency Outreach and the terms outlined herein. Community Partnership for Energy Efficiency Outreach expenditures, requirements and eligibility may be terminated, canceled, or modified by the Utilities at any time without notice.

Applicant understands that all funding for rebates under this program derives from the Energy Efficiency Fund which is managed, in part, by Eversource, UI, and funding, in part, by their customers. Neither Eversource nor UI guarantee the availability of funding for the program and neither is responsible for any costs or damages incurred by applicant if funding for this program or the Energy Efficiency Fund is reduced or eliminated by the State of Connecticut, the Public Utilities Regulatory Authority, Department of Energy and Environmental Protection or other State of Connecticut action. Funding is subject to change at any time without notice.

**Application for the Connecticut Utilities Administrators'
Community Partnership for Energy Efficiency Outreach**

Please use this form to complete your Application. A bulleted list format is encouraged where possible. A memorandum of understanding (MOU) between cooperating parties and letters of endorsement may be included as attachments.

*****Note: This is a fillable form document – the rows will expand as you begin typing.*****

Groups/Organizations/Municipalities Applying:	Target Municipality for Outreach:
Point of Contact Name, Title & Affiliation:	
Email & Phone:	
Secondary Point of Contact Name, Title & Affiliation:	
Email & Phone:	
Fiduciary Agent Organization:	
Fiduciary Agent Point of Contact Name and Title:	
Fiduciary Agent Email:	
Fiduciary Agent Phone:	
Please briefly describe how the above organizations will work together:	
Do you know if the municipality you are planning to conduct outreach in is a current and/or planned participant in a state and/or federal energy efficiency program(s)? If so, please share the program(s) here:	

Select which goal your project will pursue. Note that for Round 1, applicants can only choose one goal.

<input type="checkbox"/>	Goal 1: Demonstrating actions that will lead to a 10% increase in homes participating in Home Energy Solutions SM (through the municipality's Energize CT Utility sponsor).
<input type="checkbox"/>	Goal 2: Demonstrating actions that will lead to a 5% increase in homes participating in Home Energy Solutions-Income Eligible (through the municipality's Energize CT Utility sponsor).
<input type="checkbox"/>	Goal 3: Demonstrating actions that will lead to a 15% increase in the number of rebates submitted for a Residential insulation and/or heat pumps replacing electric resistance heat. (These are rebates through the municipality's Energize CT Utility sponsor).
<input type="checkbox"/>	Goal 4: Demonstrating actions that will lead to a 5% increase in the number of small businesses participating in the Small Business Energy Advantage program and municipal buildings that participate in the Utilities' energy efficiency programs with an increase of a minimum of 5 and a maximum of 30 unique participating businesses.

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Please fill out the following format to detail community education, outreach, and marketing for the one-year program period Round 1 of Partnership. This plan may not reflect the final set of activities to be implemented; however, it should demonstrate how the applicants will be able to achieve the target municipality’s energy efficiency participation goals. Applicants are encouraged to add additional rows to each section.

Month	1	2	3	4	5	6	7	8	9	10	11	12
Meetings, Trainings & Organization												
Marketing Activities												
Events to Table												
Events to Organize												
Groups & Stakeholders in the Community to Coordinate/Meet/Communicate												



Share your strategy or strategies for achieving your chosen goal. Please include a description of your strategy (Roughly 3-10 bullet points or a ½ a page) that includes details outreach to your target community.


Share how you would use your seed funding to accomplish your chosen goal. (Keep in mind that this would be 20% of your total funding for Goals 1, 3 and 4; 30% of your total funding for Goal 2)

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Share how you would use your funding allocated after the halfway mark of the program period. Keep in mind that this would be 65% of your total funding for Goals 1, 3 and 4; 55% of your total funding for Goal 2)

Share how you will organize your project to stay on track with monthly reports, periodic meetings, project financials and other tracking items to ensure that you would earn 15% of your total funding in the last month of the project.

Share a description of current and pre-existing relationships with organizations within your community, and to what extent the efforts of the Partnership will build upon those associations.

Share a description of the personnel/volunteers/interns who would be assigned to your project and their specific project responsibilities, including a brief statement of qualifications for each of your key team members. 

Share a description and budget breakdown that illustrates how your project seed funding and remaining funds would be used to further participation in energy efficiency programs in your target municipality. Note that it is preferable to present the budget in spreadsheet format with brief descriptions for each line item.

If you are pursuing Goal 2 (Achieve a 5% increase in homes participating in Home Energy Solutions-Income Eligible (through the Energy Efficiency Fund and municipality's Utility), please share how your outreach will include focused initiatives to reach distressed U.S. Census blocks, areas with a high concentration of renters, residents with limited English proficiency, and/or low-income residents.



Application Signatures:

I certify that I am an authorized signatory for the Applicant Community Group, Organization or Municipality.

By checking this box and typing my name below, I am electronically signing my application.

Name and Title (Please Print):

Community Group, Organization or Municipality:

Date:

I certify that I am an authorized signatory for the Applicant Community Group, Organization or Municipality.

By checking this box and typing my name below, I am electronically signing my application.

Name and Title (Please Print):

Community Group, Organization or Municipality:

Date:

I certify that I assume fiduciary agency for this application.

By checking this box and typing my name below, I am electronically signing this application and my entity assumes fiduciary responsibilities for disbursement of funds.

Name and Title (Please Print):

Organization or Municipality:

Federal Tax ID:

Date:

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Appendix A: Targeted Energy Efficiency Measures for the Partnership

Home Energy Solutions

In a typical Home Energy Solutions visit, Utility-approved technicians evaluate a home's energy performance and facilitate comprehensive energy upgrades in existing homes to reduce whole-home energy consumption. These upgrades include energy-saving measures such as sealing air leaks and installing energy-efficient lighting, faucet aerators, and low-flow showerheads. On average, a single-family home in Connecticut receives about \$1,000 in services and realizes \$200-\$250 in annual energy bill savings. on their annual energy bills. Deeper energy-saving measures such as insulation, high-efficiency heating and cooling, water heating, windows, and appliances may also be recommended by the technicians, and special incentives are given to program participants to upgrade.

Home Energy Solutions-Income Eligible

The Home Energy Solutions-Income Eligible program is designed to help income-qualified residents receive home efficiency upgrades and comprehensive weatherization services at no cost. To qualify, a family's combined gross annual income must be below the state's 60 percent income median. If a home qualifies for additional services (such as insulation or a more energy-efficient refrigerator) then technicians may arrange for contractors to come back to the home and perform the work at little to no cost (depending on circumstances).

Residential Retail and Heating, Cooling, and Ventilation (HVAC) Products

Connecticut's Products program ensures that all residential customers have access to high-efficiency lighting, HVAC, and water heating equipment, including thermostats, lighting controls, appliances, and other energy-efficient products. Rebates or instant discounts are available for products including lighting, appliances, and HVAC and water heating equipment.

Small Business Energy Advantage (SBEA)

A SBEA Utility-authorized contractor will perform an energy assessment (audit) of a small business facility free of charge. The customer's Utility reviews the assessment, and if approved, the SBEA contractor will present a comprehensive proposal to the customer that includes energy-saving improvements that make sense for the business, complete installation costs and estimated energy savings, along with any incentives and financing options. Measures include high-performance lighting, occupancy sensors, HVAC equipment, programmable thermostats, energy management systems, high-efficiency commercial kitchen and refrigeration equipment, air compressors, premium-efficiency motors, envelope and water-saving measures, and c