

# ENERGIZE CONNECTICUT<sup>SM</sup>

## COMMUNITY PARTNERSHIP FOR ENERGY EFFICIENCY ENGAGEMENT INITIATIVE ROUND 1 APPLICATION FOR INTERESTED PARTIES

REVISED AUGUST 4, 2021

### Application Deadline: October 1, 2021 by 5:00 p.m.

The Connecticut electric and natural gas utilities (Eversource, United Illuminating, Connecticut Natural Gas, and Southern Connecticut Gas, collectively, "the Companies"), 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. Our goal in working together is to better familiarize residents and businesses on 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 Engagement Initiative ("Partnership"). The goals of the Partnership work in concert with joint 2019-2021 Conservation & Load Management Plan goals and Energize Connecticut (Energize CT), an initiative of the Connecticut Energy Efficiency Fund, the Connecticut Green Bank, the State of Connecticut, and the Companies, which was created to empower Connecticut to make smart energy choices, both now and in our future. Funding support for the Energize Connecticut programs 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 raising awareness and measurable participation in the Companies energy efficiency offerings within their own communities. Furthermore, participants in the Partnership will receive training on energy efficiency programs, partake in opportunities for their communities as a whole to save money, network with other communities, among other benefits. The Partnership desires to emphasize outreach to the following select groups: customers within a distressed community or census block, residents with limited English proficiency, customers who qualify for Energize CT Home Energy Solutions — Income Eligible, renters in single family homes or multifamily buildings up to 4 units, and small businesses ("Preferred Targeted Groups"). The Partnership does not replace current and future residential and small business marketing in Connecticut by the Companies, 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 increasing awareness and measurable participation in energy efficiency incentives and programs<sup>1</sup> offered by the Companies, the Companies are soliciting applications from community groups, nonprofit organizations, and municipalities willing to team up with the Companies to join the Partnership and receive funding for energy efficiency outreach efforts. The Companies strongly encourage organizations and municipalities to partner together on their application and subsequent grassroots organizing, public education, and engagement activities for the expected period of November 1, 2021 through October 31, 2022. The Companies also plan to coordinate a kickoff meeting, periodic calls, and best practice trainings for participants in the Partnership. Accepted applicants will receive initial seed funding upon signature of the participation memorandum of understanding ("MOU" please see sample posted with this application on [EnergeizeCT.com](http://EnergeizeCT.com)) and the commencement of the program period, with further funding contingent upon 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.Willemsen@eversource.com](mailto:Devan.Willemsen@eversource.com) or [Sheri.Borrelli@uinet.com](mailto:Sheri.Borrelli@uinet.com) with any questions before noon on September 29, 2021. Questions received after that date will not receive a response to ensure fairness and remove partiality amongst applicants. An informational webinar regarding the Partnership's goals and application will be held on July 29, 2021 at noon and again at 6:00 p.m.

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

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## Community Partnership for Energy Efficiency Engagement Initiative Participation Requirements and Details

### Who Can Apply and Participate in the Partnership?

Community groups, nonprofit organizations, and municipalities located within the state of Connecticut and the Companies' service area are encouraged to apply. The Companies strongly encourage partnerships within these categories, where possible. Municipalities are encouraged to partner with a community based organization. For example, an application that is jointly submitted by the town of Smithville<sup>2</sup> 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, it is strongly encouraged, but not required, to submit with the application a letter of support on municipal letterhead from the municipality where the planned outreach will take place. 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 Companies strongly encourage applicants to focus their outreach within the bounds of 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.
- The 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 Partnership?

Partnership participants will be eligible for funding 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 or at least 5 to 30 unique participating businesses per community. Funding awards will be based on the project submitted on the application. Base funding awards will range from \$5,000 to \$25,000.

Please be aware 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 (\$6,000 to \$30,000). 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

<sup>2</sup>Fictitious municipality created for the purposes of an example.

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>).

Once an application is reviewed and deemed qualified for acceptance into the Partnership, the Companies' 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. Monies shall be deposited into an applicable account with receipts and disbursements reconciled and reported monthly. The seed funding amount (see section labeled "*How Can Partnership Participants Earn Funding?*" below) 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 a progress review with the Companies 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.

## **Additional Resources Offered to Partnership Participants**

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

- A designated Company staff person as POC.
- An orientation session, including an introductory training on energy efficiency programs.
- Energize Connecticut and utility company-specific marketing materials (e.g. brochures, talking points, presentations, newsletters, and digital communications, etc.) promoting the Companies' energy efficiency programs, directing customers to 877-WISE-USE or online lead forms.
  - ◇ The Companies can provide participants with talking points, brochures, presentation slides related to the goals of the Partnership. The Companies 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 Company(ies), municipal seal, or logo of the community group.
- Periodic information regarding individual progress 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.

## How Can Partnership Participants Earn Funding?

Partnership participants can earn funding beyond their seed funding (which varies by Goal) 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%	<b>Goal 1:</b> Demonstrating actions that will lead to a 10% increase* in homes participating in Home Energy Solutions <sup>SM</sup> (through the municipality's Energize CT utility sponsor).
30%	55%	<b>Goal 2:</b> 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%	<b>Goal 3:</b> Demonstrating actions that will lead to a 15% increase* in the number of rebates submitted for residential insulation and/or heat pumps replacing electric resistance heat. (These are rebates through the municipality's Energize CT utility sponsor).
20%	65%	<b>Goal 4:</b> 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 Companies' energy efficiency programs with at least 5 to 30 unique participating businesses per community.

\*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>.

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## COMMUNITY PARTNERSHIP FOR ENERGY EFFICIENCY ENGAGEMENT INITIATIVE

### ROUND 1 APPLICATION FOR INTERESTED PARTIES

REVISED AUGUST 4, 2021

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"><li>• Participation in periodic calls and submission of a brief monthly outreach report to the Companies to track progress toward goals laid out in the engagement plan, including any barriers to program participation noted in the community.</li><li>• Demonstrate follow through, over the course of the grant period, on the participant's marketing and outreach plan to encourage participation in Energize CT energy efficiency programs, especially those related to their selected goal.</li></ul>

Participants can earn a bonus award for achieving their selected goal. This is a bonus payment that is allocated in addition to the total funding awarded.

Percentage of Total Funding Awarded	Achieved Goal
10% of total funding possible	<ul style="list-style-type: none"><li>• Achievement of selected Goals 1-4 outlined above</li></ul>

### **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. The Companies are looking for innovating and creative ways to encourage participation in energy efficiency programs.

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, property managers, and condo associations or communities.
- 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 Companies' K-12 Energy Education curriculum, professional development, and outreach programming.
- Develop collaborative relationships with Energize Connecticut business partners to follow through on developed customer leads.

### **What Will Be the General Responsibilities of Partnership Participants?**

- Ensure fiscal transparency by providing the Companies with a budget that breaks down how funding will be received, and disbursements will be spent. Budgets will need to be signed off by participating organizations and fiduciary agents and the Companies will provide feedback on each budget proposal prior to disbursement of seed funds.
- Provide monthly reporting that includes grant fund reporting, 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. Monthly reports will be due on the 15th of each month for the previous month of activities.
- 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 Companies prior to public distribution.
- Participate in periodic calls with the Companies and the other participants in the 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 worked with their project and how they would like to stay engaged with the Companies regarding energy efficiency programs after their Partnership participation year concludes.

- If the Partnership has not developed specific collaborative relationships with Energize Connecticut authorized contractors, any marketing materials developed by the participant must direct customers to an authorized contractor to implement those programs, an Energize Connecticut online lead form or application, or 1-877-WISE-USE. Additionally, 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 July 29, 2021 at Noon and 6:00 p.m. or reach out to Devan Willemssen at [Devan.Willemssen@eversource.com](mailto:Devan.Willemssen@eversource.com) or Sheri Borrelli at [Sheri.Borrelli@uinet.com](mailto:Sheri.Borrelli@uinet.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 entire form prior to completing 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 Companies' electric service area are encouraged to apply. Selection of the proposals will be made by the Companies 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; target community energy efficiency savings potential, and preliminary project budget. Applications focused on engaging preferred Targeted Groups will be given preferential consideration. 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 the Energize Connecticut energy efficiency programs.
- Target municipality has high concentrations of renters and income eligible customers, based on U.S. Census data.
- Target municipality/census tracts that have high concentrations of renters who are responsible for their own heating and cooling.

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

**Tentative Project Schedule\***

Key Activity	Date
Informational webinar with the Companies for interested applicants	July 29, 2021 at Noon and 6:00 p.m.
Questions closed	September 29, 2021 by Noon
Applications due	October 1, 2021 by 5:00 p.m.
Proposed project meetings with applicants	October 6-13, 2021
Selected communities notified (via phone and email)	October 22, 2021
Participant MOUs signed and returned (via electronic signature)	On or before November 1, 2021
Round 1 activity start date	November 1, 2021
Mandatory orientation and training meeting with each participant	November 1-10, 2021
Seed funding (20-30% depending on goal) disbursed**	November 1, 2021 /Upon return of signed MOU
End of first quarter meetings	February 1-4, 2022
Halfway mark meetings	May 2-6, 2022
Remaining goal funding (55-65% depending on goal) disbursed	May 9-20, 2022
End of third quarter meetings	August 1-5, 2022
Required milestones funding disbursed	October 1, 2022
Round 1 activity end date and final project debrief meetings	October 30, 2022; October 27-31, 2022
Final project reports due	November 31, 2022

\*This is a not final schedule and for planning purposes only.

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

**APPLICATIONS MUST BE COMPLETE TO BE CONSIDERED.**

*DISCLAIMER: The Companies may terminate a municipality's or community group's participation in the Community Partnership for Energy Efficiency Engagement Initiative if the Companies determine the municipality or community group is not demonstrating a good faith effort to reach the Minimum Participation Requirements. The Companies 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 Engagement Initiative or modify the Community Partnership for Energy Efficiency Engagement Initiative and the terms outlined herein. Community Partnership for Energy Efficiency Engagement Initiative 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 and United Illuminating, and funding, in part, by their customers. Neither Eversource nor United Illuminating 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.*