



Duke Energy Helping Home Fund



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Duke Energy Helping Home Fund

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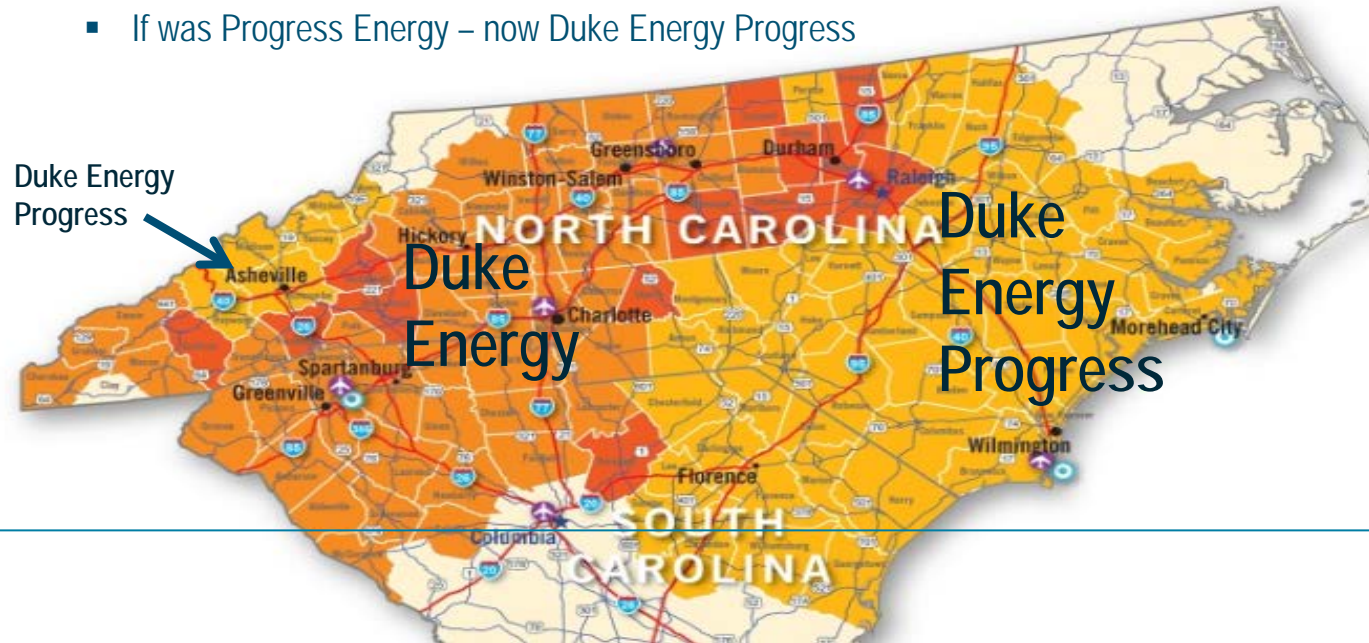


Program Overview



Duke Energy Carolinas / Duke Energy Progress

- While merged, Duke Energy Carolinas and Duke Energy Progress are separate operating utilities
 - In simplest terms
 - If was Duke Energy – still Duke Energy
 - If was Progress Energy – now Duke Energy Progress



Rate Case Settlement Agreement

As a result of the rate cases held in 2013, the Commission ordered that \$20M (\$10M per utility) be spent to assist low income customers. A proposal was submitted and approved that includes the following:

- The Commission approved DEP's request that:
 - \$3 Million of the \$10 Million be allocated to weatherization, health & safety, and appliance replacement
 - \$7 Million of the \$10 Million be allocated for Heating/Cooling system replacements to help low income customers manage their energy costs with the **goal of reducing bill payment needs**
- The Commission approved DEC's request that:
 - \$3 Million of the \$10 Million be allocated to Health & Safety issues and appliance replacement
 - \$7 Million of the \$10 Million be allocated for Heating/Cooling system replacements to help low income customers manage their energy costs with the **goal of reducing bill payment needs**



Program Guidelines



Program Guidelines – DEP and DEC

Duke Energy Progress (DEP) \$10M	Duke Energy Carolinas (DEC) \$10M
\$3M Health and Safety Repairs Weatherization Appliance Replacement	\$3M Health and Safety Repairs Appliance Replacement
\$7M Heating / Cooling System Replacement Duct Repair / Replacement Electrical System Upgrade	\$7M Heating / Cooling System Replacement Duct Repair / Replacement Electrical System Upgrade



Program Guidelines – Eligibility

- ❑ NC Duke Energy customer with an active account
- ❑ Household income is 200% of the Federal Poverty Guidelines
- ❑ Available to owner and renter-occupied residences
- ❑ Available to apartment dwellings in multi-family with owner approval
 - Dwellings with the lesser potential savings shall receive the lesser Program investment dollars based on a tiered service approach (based on the customer's historic energy use per square foot). Eligibility will be based on 12-month billing history.
 - Prioritization of funds will be left to service provider's discretion to prioritize measures based on household previously weatherized as well as those on the current list of applicants



Program Guidelines – Tiers 1 & 2 (DEP)

Tiers Services 1 & 2 (DEP)

	Use/ square foot/year	Investment
Tier 1	< 7 kWh / ft2 or < \$.25/sq ft oil / LP Gas heat or < \$.42/sq ft oil/LP Gas heat & Water heating	Up to \$600
Tier 2	≥ 7 kWh / ft2 or ≥ \$.25/sq ft oil / LP Gas heat or ≥ \$.42/sq ft oil/LP Gas heat & Water heating	All SIR* > 1.5 up to \$4,000

*SIR – Savings to Investment Ratio from NEAT audit tool

Assignment of appropriate Tier will be determined by Agency. Tiers will be based on weather adjusted bill history for the electric heat customer or actual oil and/or propane bills obtained from customer or their Agency.



Program Guidelines – Weatherization (DEP)

\$3M Weatherization (DEP)

Tier One – if a customer uses less than 7 kWh per square foot per year, the total program dollars allowed per home is **\$600**. Tier One Services include:

- Heating System Tune-up & Cleaning
- Heating System repair up to \$600
- Water Heater Wrap for electric water heaters
- Pipe Wrap
- Cleaning of electric dryer vents
- Energy Star Compact Fluorescent Light (CFL) Bulbs
- Low-flow shower heads and aerators
- Weather-stripping doors & windows
- Energy Education



Program Guidelines – Weatherization (DEP)

\$3M Weatherization (DEP)

Tier Two – if a customer uses more than 7 kWh per square foot per year, the total program dollars allowed per home is \$4,000.

Tier Two services include:

- All Tier One Services *plus*:
- Additional cost effective measures using the NEAT audit where the energy savings pay for the measure over the life of the measure as determined by a standard heat loss/economic calculation. **Such items can include but are not limited to attic insulation, Air sealing, duct sealing, wall insulation, crawl space insulation, and floor insulation.**
- Up to 20% of the Tier Two costs can be used for Health & Safety repairs, not to exceed \$800.



Program Guidelines – Health and Safety

Pre-Weatherization Funds for Health and Safety (DEP and DEC)

- Not to exceed \$800 per home
- **Repairs include, but are not limited to, items such as:**
 - Roof Repairs
 - Safe ingress and egress from the structure
 - Window repair / replacement
 - Leaky plumbing, toilet replacements or repairs
 - Water heater repair and/or replacements
 - Doors in disrepair
 - Electrical issues
 - Pest Remediation
 - Water damage
 - Mechanical ventilation
 - Gas range repair / replacement
 - Carbon monoxide remediation
 - Debris Removal
 - Vapor Barrier



Program Guidelines - Heating/Cooling System Replacements

\$7M each (DEP and DEC)

- Duke Energy will provide funds for replacement units for inefficient or non-working electric supplied HVAC systems, as well as the conversion of existing oil and propane heating systems to a heat pump. The heat pump replacement system must meet the following specifications:
 - 14 SEER or greater
 - Have an 8.2 HSPF or greater
 - Indoor and outdoor units must be compatible
- Home must have been weatherized as part of the installation of a new system



Program Guidelines - Heating/Cooling System Replacements

HVAC Replacement criteria:

- Available to owner and renter-occupied residences, manufactured homes and apartment dwellings.
- Mini-split heat pumps can also be installed, if applicable.
- HVAC replacements may only be performed for existing electric furnaces, existing heat pumps, oil furnaces or lp gas furnaces.
- Repair/sealing of existing ductwork, or installation and sealing of new ductwork, if necessary.
- Upgrade of electrical system to accommodate new heat pump (for existing non-electric heat customers).

The total dollars, for any home receiving a heat pump replacement must not exceed \$10,000 without pre-approval from Duke Energy.



Program Guidelines -Appliance Replacement

Appliance Replacement – DEP & DEC

- Inefficient appliances can be replaced with **ENERGY STAR** appliances
- \$800 max per home

Refrigerators

Clothes Washers

Room Air Conditioners



Homes participating in Appliance Replacement Services must be **individually-metered**, renters or owners of single-family and multi-family residences, condominiums, or mobile homes on a residential rate schedule.



Program Guidelines -Appliance Replacement

Refrigerators

- To determine refrigerator efficiency, at least a two hour metering will be conducted.
- If the refrigerator is less than 10 years of age, in lieu of testing, the national database can be used to look up model information to determine efficiency, and if the SIR >1, the refrigerator will be eligible for replacement.

Clothes Washers

- Will be replaced if inoperable or greater than 10 years old.

Room Air Conditioners

- Will be replaced if inoperable or greater than 10 year old.
- Will not be replaced if the structure currently has a central air conditioning system.

**New appliances must be ENERGY STAR models.
All old appliances must be picked up and recycled.**



Allocation Approach

Data Sources:

- Duke Energy Customer Data – Program Qualifying Households
- U.S. Bureau of Labor Statistics – Unemployment Rates as of October 21, 2014

Methodology:

- By County
- Number of program qualifying households based on poverty
- Unemployment rate that is higher than the State unemployment rate



Data Tracking and Reporting – LM Captures

- Ability to integrate data from other data tracking sources
- Real time access via secure web portal
- Role based user id and passwords
- Create, view and share dashboards
- Export data for analysis
- Track projects from application to installation to payment
- Track, monitor and report all QA/QC activities
- Track funding, projected savings and job status
- Program tools and calculators



Intent to Participate Process



Who Can Be A Service Provider?

- An entity who has the capacity, technology, demonstrated experience and expertise to provide comprehensive weatherization and HVAC services.



Important Dates

- December 3, 2014 Questions due to helpinghome@nccaa.net
- December 5, 2014 [Intent to Participate Form](#) due by NOON
- December 22, 2014 (planned) Offers Extended with MOUs
- January 9, 2015 (planned) MOUs Executed



Important Note:

- Pending the review of the information submitted, agencies selected to participate will be notified by December 22, 2014.
- Completion of the Intent to Participate Form does not guarantee participation in the program.



The Training Plan will be shared during the MOU Process. Training will include, but not be limited to, the following categories:

- Marketing
- Customer Care
- Program Orientation
- Data Tracking and Reporting (LM Captures)
- Performance Management (ROMA)



- NCCAA, in cooperation with Duke Energy, has determined the marketing plan for the Helping Home Fund Program and will provide branding guidelines.
- Service Providers will play a key role in implementing the marketing activities.



- Customer Care is an extremely important aspect of the program.
- Service Providers will work in cooperation with NCCAA to ensure that ALL customer concerns are addressed in a respectful and timely manner.



A Successful Program Partnership



- Vision & Mission
- Program Oversight



- Program Management
- Provider Relationships
 - Budget Tracking
 - Marketing

Participating Agencies

- Weatherization Expertise and Experience
- HVAC Services



- QA/QC
- Payment Processing
- Data Tracking & Reporting

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