NATIONAL ENERGY & UTILITY AFFORDABILITY COALITION



2019 Annual Conference Utility Affordability Roundup

June 3-5, 2019 Omni Fort Worth Hotel Fort Worth, Texas



Annual Meeting June 2-3

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Howdy Y'all!

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NEUAC 2020 Back Cover

Welcome to Fort Worth, Texas and the National Energy and Utility Affordability Coalition's Annual Conference. We are excited to provide you with an agenda packed with great workshops and inspirational general sessions. Over the next few days, we welcome you to take advantage of the opportunity to learn more about how you can impact your own organization and the limited-income households in the communities you serve.

This year, we are offering a "roundup" of topics around energy and utility affordability, including vulnerable populations, efficiency and renewables, policy and advocacy, nonprofit management, and a brand new track for those of you who are new to the field.

In 2018, our members and fellow stakeholders championed an effort that saw funding for the Low-Income Home Energy Assistance Program (LIHEAP) increase for the second year in a row. NEUAC, through its efforts at this conference, the #SaveLIHEAP campaign, and LIHEAP Action Day, has helped raise the visibility of the plight of households facing energy poverty. The increase in funding for LIHEAP happened at a time when funding for LIHEAP was marked for complete elimination for the third consecutive year. Together, your voices were strong enough to not only maintain but actually increase funding.

NEUAC's members are very strong advocates for our work. As we continue to find ways to help limited-income households afford and maintain basic utility service, we must work with all stakeholders to promote our message. Our hope is that this conference provides the opportunity to further the dialogue for limited-income energy and utility concerns. We hope you find value in the sessions offered this year, and thank you for dedicating your professional life to the service of those most in need.

Yee-haw!



Michael J. Bradford President **NEUAC** Board of Directors



The National Energy and Utility Affordability Coalition (NEUAC) is a broad-based coalition of diverse member organizations and individuals dedicated to heightening awareness of the energy needs of low-income energy consumers, fostering public-private partnerships and engaging in other activities to help address these needs. Led by a dedicated Board of Directors, NEUAC's goals are:

- To increase awareness and understanding of the nature and magnitude of low-income energy problems
- To formulate and advance low-income energy policy through compilation, analysis and dissemination of data and information
- To provide information and technical assistance in the creation and development of fuel funds
- To promote the development of statewide and regional fuel funds

NEUAC Governing and Advisory Boards

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NEUAC Conference App: Attendify

Be sure to use the mobile app throughout the conference to share great ideas, connect with colleagues, and enjoy your time in Fort Worth. Download the Attendify app from your app store.

Workshops & General Session Locations

All workshop and general session information and locations are available in the conference app, as well as the following pages of this conference program.

Conference Exhibits & Raffles

A variety of organizations important to servicing our limited-income clients and supporting you to do your job better are exhibiting during the conference. Please support our exhibitors by visiting each of them. This year, raffle drawings will be based on visiting all exhibitors. You must be present during the raffle drawings to win any of the prizes. Note: Featuring these displays does not constitute a product endorsement from NFUAC.

Continuing Legal Education Registration

NEUAC is seeking Continuing Legal Education (CLE) is available for \$22/day with no in/out privileges. credit from the accrediting authorities of many states. The conference will assist in securing credits **Check Out Without Missing Out** for lawyers from jurisdictions that participate in the Check-out time at the hotel is 11:00 a.m. American Bar Association reciprocity agreement. Conferees seeking CLE credit must sign in and out of **Special Assistance** The registration staff is available to assist with any the CLE sessions which they attend to document their attendance. For more information and to receive the special needs. Please notify staff of any dietary participation form, please visit Registration. restrictions or other needs.

All CLE sessions in this program are marked with §. In Case of Emergency

Session Evaluations

This year you will instantly be able to share your feedback for each session through the conference app.



General Information

Recording

NEUAC and NEADA may photograph, videotape and/ or audiotape attendees and materials at the functions of these conferences. The productions of such may be freely disseminated for purposes including but not limited to future outreach, education, and informational efforts.

Badges

Badges are required for admittance to all meetings, sessions, meals, and the reception. If you lose your badge, please go to Registration for help.

Spouses & Guests

NEUAC is offering a conference guest registration option this year. The guest registration cost is \$155 and includes 3 breakfasts, 2 lunches and the June 4 evening reception. For the June 4 reception only, the cost is \$50. Guests will receive a special badge that they must show to be admitted. Please note that no workshops are included. Guest passes may be purchased at Registration.

Hotel Parking

Valet parking is available for \$22/day, or \$30/day for overnight guests. An adjacent self-parking city garage

Please review the emergency information in your guest room to familiarize yourself with emergency procedures. For a life threatening event, call 911. For other illnesses or injury please check with the hotel front desk for assistance.

Monday, June 3

	Session 1	Session 2	Session 3	Session 4		Session 5	Session 6	Session 7	Special Session
	9:15-10:30 a.m.	10:45-11:45 a.m.	2:00-3:00 p.m.	3:15-4:15 p.m.		9:30-10:30AM	10:45-11:45AM	2:00-3:00PM	3:15-4:15PM
Track A: Vulnerable	§Understanding the Needs and Wants of Low-Income Customers	Outreach to Vulnerable Populations	§The Reality of Re-Entry	§Responding to Natural Disaster When a Disaster Strikes	Track A: Vulnerable	§Undocumented Customers Dilemma	Creating Impact-Driven Community Partnerships	Poverty and Vulnerable Populations Roundup: Bridges out of Poverty	§LIHEAP 101
Populations	Texas A-D	TRIBAL TRACK Texas A-D	Texas A-D	Texas A-D	Populations	Texas A-D	Texas A-D	Texas A-D	Fort Worth 5
Track B:	Understanding Energy Insecurity	§ A Tale of Two Federal Partners:	Using Efficiency and Renewables to	Healthy Homes	Track B:	§The Water Affordability Crisis	Using Technology to Advance	Roundup of Best Practices Panel	§LIHEAP 101
vancing Energy		Solar Incentives and Disaster Relief	Promote Economic Development		Advancing Energy Affordability in Our		Affordability	Discussion	
ordability in Our Communities	Fort Worth 4	Fort Worth 4	TRIBAL TRACK Fort Worth 4	Fort Worth 4	Communities	Fort Worth 4	Fort Worth 4	Fort Worth 4	Fort Worth 5
Track C: licy, Advocacy, nd Education	Policy, Advocacy, and Education: Working Together for Low-Income Households	Building an Effective Coalition in Your State	Winning Advocacy Strategies	Policies to Increase Access to Low-Income Energy Programs TRIBAL TRACK	Track C: Policy, Advocacy, and Education	Incorporating Education into Energy Assistance & Energy Efficiency Programs	SHow LIHEAP Performance Management is Increasing LIHEAP Program Impacts	Brainstorming Solutions to Policy, Advocacy, and Education Issues	§LIHEAP 101
	Fort Worth 5	Fort Worth 5	Fort Worth 5	Fort Worth 5		Fort Worth 5	Fort Worth 5	Fort Worth 5	Fort Worth 5
Track D: Drichment and Dowth Strategies For Nonprofit	Speed Dating for Development and Fundraisers	Creating a Roadmap for Recruitment, Development, and Grant Writing Success	Fundamentals of Utilitizing Data for Organizational Outreach	Words Matter, Dollars Count: How to Raise Money with the Right Message	Track D: Enrichment and Growth Strategies for Nonprofit	Taking Care of You First: Addressing Nonprofit Employee Mental Health	Reaching the Unreachable: Serving Those with Challenging Circumstances	FUNdraising Wrap-up	§LIHEAP 101
ility Assistance Programs	Fort Worth 1-3	Fort Worth 1-3	Fort Worth 1-3	Fort Worth 1-3	Utility Assistance Programs	Fort Worth 1-3	TRIBAL TRACK Fort Worth 1-3	Fort Worth 1-3	Fort Worth 5
Track E:	New to Customer Assistance and All That Goes with It: An Introduction	Do You Qualify for LIHEAP? What Else?	Holistic One Stop Shop: Partnerships and Collaborations	Making Sure You Have All the Right Tools in Your Toolbox	Track E: Introduction to	Flexibility with LIHEAP and Drafting Policy	Help the Customer, Help Your Bottom Line: Risks and Benefits	It's a Texas Roundup Y'all!	§LIHEAP 101
ility Assistance Programming	Fort Worth 6-8	Fort Worth 6-8	Fort Worth 6-8	Fort Worth 6-8	Utility Assistance Programming	TRIBAL TRACK Fort Worth 6-8	Fort Worth 6-8	Fort Worth 6-8	Fort Worth 5

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Tuesday, June 4

Schedule at a Glance

Monday, June 3		
7:00 a.m 5:00 p.m.	Registration and Exhibits are open	Foyer
7:00 a.m 8:00 a.m.	Breakfast	Texas Ballroom
8:00 a.m 9:00 a.m.	Welcome from NEUAC & Friends!	Texas Ballroom
8:00 a.m 10:30 a.m.	NEADA Pre-Conference Meeting	Stockyards 1
9:00 a.m 9:15 a.m.	Break	Foyer
9:15 a.m 10:30 a.m.	Session 1	Breakout Rooms
10:30 a.m 10:45 a.m.	Break	Foyer
10:45 a.m 11:45 a.m.	Session 2	Breakout Rooms
11:45 a.m 12:30 p.m.	Lunch	Texas Ballroom
12:30 p.m 1:45 p.m.	Staying Right Side Up When Everything Is Upside Down	Texas Ballroom
1:45 p.m 2:00 p.m.	Break	Foyer
2:00 p.m 3:00 p.m.	Session 3	Breakout Rooms
3:00 p.m 3:15 p.m.	Break	Foyer
3:15 p.m 4:15 p.m.	Session 4	Breakout Rooms
5:00 p.m 5:30 p.m.	Annual Membership Meeting	Fort Worth 6-8
5:30 p.m 6:30 p.m.	Member VIP Garden Soiree	Sundance Terrace
Tuesday, June 4		
7:00 a.m 5:00 p.m.	Registration and Exhibits are open	Foyer
7:00 a.m 8:00 a.m.	Breakfast	Texas Ballroom
8:00 a.m 9:15 a.m.	§Dialogue with the Feds	Texas Ballroom
9:15 a.m 9:30 a.m.	Break	Foyer
9:30 a.m 10:30 a.m.	Session 5	Breakout Rooms
10:30 a.m 10:45 a.m.	Break	Foyer
10:45 a.m 11:45 a.m.	Session 6	Breakout Rooms
11:45 a.m 1:00 p.m.	Lunch	Texas Ballroom
1:00 p.m 1:45 p.m.	2020 NEUAC Conference Preview and Awards	Texas Ballroom
2:00 p.m 3:00 p.m.	Session 7	Breakout Rooms
3:00 p.m 3:15 p.m.	Break	Foyer
3:15 p.m 4:15 p.m.	LIHEAP 101	Fort Worth 5
5:00 p.m 7:00 p.m.	Boots and Bandanas Bash	Texas Ballroom
Wednesday, June 5		
7:00 a.m 11:00 a.m.	Registration is open	Foyer
7:00 a.m 8:30 a.m.	Breakfast	Texas Ballroom
8:30 a.m 9:30 a.m.	Being Elite - The Way of a Champion	Texas Ballroom
9:30 a.m 10:00 a.m.	Break	Foyer
10:00 a.m 11:30 a.m.	Nonprofit/Government/Tribe and Utility Summits	Texas Ballroom
11:30 a.m.	Roundup Wrap Up, Event Concludes	Texas Ballroom

Monday, June 3, 2019

7:00 a.m 8:00 a.m. Texas Ballroom, Foyer	Breakfast / Exhibits
8:00 a.m 9:00 a.m. Texas Ballroom	Welcome from NEUAC
Welcome from John D	conference announcments, K Duessel, VP & Chief Customer

- Welcome from Liz Beauchamp, VP Government & Public Affairs, Atmos Energy
- Welcome from Dr. Michael Crain, Mayor's Office, City of Fort Worth, TX

9:15 a.m. - 10:30 a.m. Session 1

1A § Understanding the Needs and Wants of Low-Income Consumers Texas A-D

Moderator: Dave Defide, Manager, Customer Programs, Duquesne Light Company **Presenter:** Nathan Shannon, Deputy Director, Smart Energy Consumer Collaborative

This session will provide attendees with an understanding of the unique circumstances of energy customers with limited income; the programs, services, and technologies that appeal to them; and what drives their participation in utility assistance programs. Based on the "Spotlight on Low-Income Consumers" report, which mined survey responses from thousands of low-to-moderate consumers, this session will address low-income consumers' knowledge of energy efficiency actions, their primary reasons for saving energy, their current levels of interest in utility programs, and their preferred methods for communication with their electric providers. The session also will detail opportunities for engagement with customers who may have limited resources, program design considerations, and outreach best practices.

1B Understanding Energy Insecurity Fort Worth 4

Moderator: John Rich, Executive Director, Mid America Assistance Coalition **Presenters:** Ariel Drehobl, Senior Research Analyst, American Council for an Energy Efficient Economy Jacquie Moss, Research Fellow, Texas Energy Poverty Research Institute Hugh Wooden, Senior Analyst, Finance Division, Kansas City Water Services

This session will set the stage for the Energy Affordability track by providing attendees with an overview of how energy efficiency, renewable energy, and water-saving investments can play a role in energy and water affordability as well as their importance and impact. Ariel Drehobl will speak about ACEEE's research on how energy efficiency can alleviate high energy burdens while also providing long-term energy affordability and other benefits to households. Jacquie Moss will speak about her work with the Texas Energy Poverty Research Institute, focusing on how renewable energy can contribute to equitable, sustainable, and resilient energy for all. Lastly, Hugh Wooden will speak about the growing water affordability crisis and potential solutions.

and Friends!

Katrina Metzler, Executive Director, NEUAC r Officer, Vistra Energy Retail



Policy, Advocacy, and Education: Working Together to Assist Low-Income Households **1C** Fort Worth 5

Moderator: David Carroll, Managing Director, APPRISE Presenters: Holly Ravesloot, Energy Policy and Evaluation Branch Chief, U.S. Department of HHS Jacqueline Berger, President, APPRISE Dan Alderson, Director of Energy Assistance, Atmos Energy

These experts will give you a road map for how to develop, advocate for, and communicate about policies that deliver comprehensive services to meet the needs of low-income households in your state. Ms. Ravesloot will help attendees understand that LIHEAP allows grantees to fund a diverse array of program services to clients, including energy assistance, weatherization, heating and cooling equipment replacement, and energy and financial education. Dr. Berger will provide attendees with information on the policies that affect low-income households and will furnish detailed examples of how important certain policies can be to ensure that programs are effective and efficient in delivering services to low-income households. Mr. Alderson will speak about his experiences working at the state level to build effective coalitions of diverse program partners and using those coalitions to advocate for effective policies and programs for low-income households.

1D Speed Dating for Development and Fundraisers Fort Worth 1-3

Moderator: Kelly Caplan, Community Outreach & WAFF Manager, Washington Gas **Presenters:** Tess Richey, Senior Manager of Development, Energy Outreach Colorado Will Preston, Communications Coordinator, Oregon Energy Fund

In this session, presenters will identify barriers to low-income program participation and specific policy initiatives that can overcome those barriers. Each of the presenters has conducted in-depth research on program access and will describe what they learned about barriers and finding potential solutions.

New to Customer Assistance and All That Goes with It! An Introduction **1E** Fort Worth 6-8

Moderator: Demetric Mercadel, Public Affairs Senior Customer Service Specialist, Entergy New Orleans Presenters: David Nelson, Senior Specialist, Con Edison Libby Perl, Analyst in Housing Policy, Congressional Research Service

In this session you will learn about who administers LIHEAP, and you will get an understanding about who is eligible for funding while staying within the program's federal guidelines. Additionally, you will get an overview of utility terms as they relate to funding qualified households. This session will also include an overview of what programs exist within LIHEAP: heating, cooling, crisis help, weatherization, and Assurance 16. Libby Perl will briefly preview her popular LIHEAP 101 session taking place in the afternoon on Tuesday.

10:45 a.m. - 11:45 a.m.

Outreach to Vulnerable Populations - TRIBAL TRACK 2A Texas A-D

Moderator: Patrick Strickland, Manager, Lumbee Tribe North Carolina Presenter: Monica Toya, Administrative Assistant, Pueblo of Jemez Senior Citizens Program/LIHEAP

Session 2

This session will focus on success stories regarding outreach to vulnerable populations through collaborations with local resources such as schools, senior centers, social service programs, housing programs, and utilities.

§A Tale of Two Federal Partners: Solar Incentives & Disaster Relief **2B** Fort Worth 4

Moderator: Edward Gingold, Attorney Advisor, Federal Energy Regulatory Commission **Presenters:** Krystal Laymon, Policy Advisor, U.S. Department of Energy Juan Lamboy Arce, WAP Program Manager, Puerto Rico Dept. of Economic Development & Commerce Felix Vasquez-Guemarez, ORAU Fellow, Weatherization, U.S. Department of Energy Holly Ravesloot, Energy Policy and Evaluation Branch Chief, U.S. Department of HHS Erica Burrin, Program Manager, Weatherization, U.S. Department of Energy

This session will provide an overview of current policies, programs, efforts, and investments offered by the federal government for investment in renewable energy to increase energy affordability. The first part of this session will focus on the U.S. Department of Energy renewable energy efforts in low-to-moderate income communities, including a focus on the benefits of renewable energy. The second part will focus on implementation of an effective solar photovoltaic program through Puerto Rico's Weatherization Assistance Program. In response to the devastation from Hurricane Maria, Puerto Rico's Energy Public Policy Program has begun integrating the U.S. Department of Energy's Weatherization Assistance Program (WAP) and the U.S. Department of Health and Human Services Low-Income Home Energy Assistance Program (LIHEAP) and their own local government funds to cover the costs of the installation of solar photovoltaics and batteries to serve low-income communities with these technologies, low cost weatherization, and other home repairs.

Building an Effective Coalition in Your State 2C Fort Worth 5

Moderator: Dan Alderson, Director of Energy Assistance, Atmos Energy Presenters: John Keeney, Area Project Coordinator, New England Farm Workers' Council Liz Berube, Assistant Executive Director, Citizens for Citizens Andrew Hawkins, Supervisor, Energy Assistance Programs, Xcel Energy Kathryn Maddux, Project Director, Energy Partnerships, National Community Action Partnership

This session highlights the importance of building a coalition to address the energy assistance and efficiency needs of low-income households. Mr. Hawkins will speak about how Xcel Energy works with partners to establish effective policies and procedures for assisting customers with their energy bills. Mr. Keeney and Ms. Berube will describe how local LIHEAP subgrantees formed a coalition to speak for the needs of low-income households, and how they engaged with other partners to identify and implement best practices for energy assistance. Ms. Maddux will share strategies that have fostered successful partnerships around the country through the Weatherization Leveraged Partnerships project.



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Creating a Roadmap for Recruitment, Development, and Grantwriting Success 2D Fort Worth 1-3

Moderator: Debbie Brown, Director of Development and Communications, Fuel Fund of Maryland Presenter: Toni Gianforti, Retired Director of Institutional Giving, Meals on Wheels of Central Maryland

This session will explore various ways to establish funding sources, including connecting with foundations, corporations, and other sources that will help attendees build a foundation for long-term funding and support.

2E Do You Qualify for LIHEAP? What Else? Fort Worth 6-8

Moderator: Kim Rikalo, Manager, Special Assistance, SMUD Presenter: Andrew Bryk, TA Specialist, New York State Office of Temporary and Disability Assistance

This session will provide an overview of the programs that are available to limited-income customers. Those customers that qualify for LIHEAP may not be aware of other programs and services that are available to customers through nonprofits, utilities, etc. These agencies provide additional programs and services that are critical to helping customers and may make a huge difference for the customer.

Lunch / Staying Right Side Up When Everything Is Upside Down 11:45 a.m. - 1:45 p.m. Texas Ballroom Presenter: Linda Larsen, CSP, CPAE

It is absolutely possible to achieve excellence when the world around you seems to be falling apart – IF you know the secrets. In this fast paced, fun program, Linda Larsen will give participants practical ways to light their own fire of excellence and motivate themselves to take positive, consistent action when they just want to give up. Attendees will learn what the most successful, effective people throughout history have all known and consciously applied. They will leave knowing how to acknowledge and enhance skills they already have; how to recognize, own and change behaviors that don't serve them; how to stay level, calm and professional when their instincts make them want to scream; how to communicate effectively to resolve differences; and how to take 100% responsibility for the interpretations they place on situations, circumstances, and other people's actions.

2:00 p.m. - 3:00 p.m. Session 3

3A **§The Reality of Re-Entry** Texas A-D

Moderator: Debra Moss, Manager, Energy Assistance, Southern Company Presenters: Marie Francis, Human Services Manager, City of Fort Worth, CAP

Laura Saintey, Project Manager of Training, Texas Department of Housing & Community Affairs Karen Keith, Program Specialist, Texas Department of Housing & Community Affairs

This session will address energy affordability challenges for those re-entering society after incarceration. More than 636,000 ex-offenders are released each year in the United States. Without an effective support system in place, 68% of them will return to prison within one year and 71% within three years. How do we assist in re-integrating people into the community? What systems need to be in place?

3B Using Energy Efficiency and Renewables to Promote Economic Development - TRIBAL TRACK Fort Worth 4

Moderator: Sheila Ruffin, Attorney Advisor, Federal Energy Regulatory Commission Presenters: Alison Donovan, Senior Consultant, VEIC Walter Haase, General Manager, Navajo Tribal Utility Authority

This session will explore examples of how energy efficiency and renewable energy developments have been used to help promote workforce and economic development. Walter Haase with the Navajo Tribal Utility Authority will speak about how NTUA developed a long-term renewable generation project that has led to specialized training, job creation, and economic and energy benefit for the Navajo Nation. Alison Donovan will speak about VEIC's efforts to develop and build Zero Energy Modular Home factories to create jobs and reduce energy burdens in rural communities.

Winning Advocacy Strategies **3C** Fort Worth 5

Moderator: Nina Moussavi, Legislative Analyst, American Gas Association **Presenters:** Dan Alderson, Director of Energy Assistance, Atmos Energy Mark Wolfe, Executive Director, National Energy Assistance Directors' Association

This session demonstrates successful approaches to advocating for low-income energy assistance and furnishes tools and information that you can use in your advocacy initiatives. Mr. Alderson will provide details on the successful effort to increase LIHEAP funding for FY 2019. The engagement with decisionmakers at all levels - local, state, and national - was effective in creating a broad mandate for energy assistance funding. Mr. Osmer will describe how the California LIHEAP providers came together to form a statewide LIHEAP advocacy campaign; building a collaborative with other organizations, establishing a link between supporters and legislators, collecting local LIHEAP stories and data, and engaging local media. Mr. Wolfe will review the findings from a National Survey of LIHEAP recipients that was funded by the American Gas Foundation and overseen by NEUAC, and will update attendees on the new NEADA LIHEAP communications initiative.

Fundamentals of Utilizing Data for Organizational Outreach 3D Fort Worth 1-3

Moderator: Jody Robertson, Director of Communications, Dollar Energy Fund **Presenter:** Stephen Marencic, Consumer Outreach Specialist, DC Office of the People's Counsel

responses from donors, clients and volunteers.



Detailed Schedule

Dennis Osmer, Executive Director, Central Coast Energy Services/LIHEAP Helps California

- This session will focus on utilizing data to increase the effectiveness of outreach efforts. Learn how to implement data collection, analyze the information you receive and use that data to evaluate your outreach efforts with as you seek

Holistic One-Stop Shop: Partnerships and Collaborations **3E** Fort Worth 6-8

Moderator: Demetric Mercadel, Public Affairs Senior Customer Service Specialist, Entergy New Orleans Presenters: Thelma French, President and CEO, Total Community Action Tanya Jones, Director, Energy Assistance & Community Development,

HeartShare Human Services of New York

This session will introduce participants to how LIHEAP assistance can be both an engagement/access point and supportive strategy to whole family (2Gen) services. The TCA Total Family model provides families with supports, services and intensive case management that assists families in moving from crisis to economic security. This session will also provide you with an introduction to 211 partnerships and their benefits. Utilities are also a great resource for programs to help customers including low-income weatherization programs. You will hear about the HeartShare model which includes joining a team of utilities, state agencies, CBO's and legislators to create a partnership that reaches into all communities to aid families in a one-stop shop that guarantees maximum assistance.

3:15 p.m. - 4:15 p.m. Session 4

§Responding to Natural Disaster When a Disaster Strikes **4**A Texas A-D

Moderator: Edward Gingold, Attorney Advisor, Federal Energy Regulatory Commission **Presenters:** Mitch Reiber, National Director for Asbestos Services and Disaster Response, Terracon Consultants Michael DeYoung, Director, Community Affairs, TX Department of Housing & Community Affairs

After the physical and financial disruption from a natural disaster, families on the margin may find that they now qualify for LIHEAP because of loss of work along with the financial impact of recovery activities. Community assistance programs can utilize the LIHEAP program as a resource in helping families recover after a natural disaster. Experts at the state level will address the flexibility within the LIHEAP grant to respond to disasters and how state agencies and their sub-grantees can be prepared to rapidly address the needs of the community impacted during and after a disaster.

4B Healthy Homes Fort Worth 4

Moderator: Jackie Berger, President, APPRISE

Presenters: Steve Luxton, Executive Director, Energy Coordinating Agency of Philadelphia Nicola Tran, Energy Program Manager, MD Department of Housing & Community Development

This session will explore the connection between buildings, energy efficiency, and health. The speakers will provide an overview of how energy efficiency and health are interconnected, as well as provide examples of programs that jointly address both energy and health issues. Steve Luxton, the Executive Director of the Energy Coordinating Agency of Philadelphia, will speak about his experience working with the EnergyFIT Philly program, which provides a model for incorporating health and safety repairs into home weatherization projects. Nicola Tran will speak about recent changes to low-income energy efficiency programming in Maryland. The program's new incentive structure is more inclusive, and installs more measures for customers that would have otherwise been deferred for health and safety reasons.

Policies to Increase Access to Low-Income Energy Programs - TRIBAL TRACK **4C** Fort Worth 5

Moderator: David Carroll, Managing Director, APPRISE **Presenters:** Matthew Lyons, Project Director, APPRISE Ed Kiely, Community Services Unit Manager, MA Department of Housing & Community Development Nat Treadway, Managing Director, DEFG Tribal Speaker TBD

This session identifies policy initiatives that help to ensure that ALL eligible households have access to low-income energy assistance and energy efficiency programs. Mr. Lyons and Mr. Kiely will discuss a Massachusetts program participation study that identified population groups underutilizing LIHEAP, uncovered the most important barriers to program participation, and led to initiatives that Massachusetts is using to overcome those barriers. A tribal speaker will discuss how his/her tribe engaged with the state LIHEAP program managers and the state ratepayer-funded program managers to ensure that all tribal members had access to energy assistance and energy efficiency programs. Mr. Treadway will describe the findings from a study of customers' experiences when they apply for energy assistance. He will report on the policies and procedures that were identified as being effective to increase customer access, improve the customer experience, and increase energy affordability.

4D Words Matter, Dollars Count: How to Raise More Money with the Right Message Fort Worth 1-3

Moderator: Debbie Brown, Director of Development & Communications, Fuel Fund of Maryland **Presenter:** Denise Stepto, Chief Communications Officer, Energy Outreach Colorado

The one common frustration shared by many Fuel Funds is money! How do we get more of it, how do we use it more effectively, how do we generate it more easily and how do we make it sustainable? The answer to all of these questions is to take a more strategic approach with our message, brand and impact. But in order to get people to step up their investment in your Fuel Fund, you have to revolutionize your fundraising messaging.

4E Make Sure You Have All the Right Tools in Your Toolbox! Fort Worth 6-8

Moderator: Kathleen Kerr, Director, Utility Assistance, Affordable Housing Alliance **Presenters:** Erin Steuer, LIHEAP Clearinghouse Project Director, National Center for Appropriate Technology Casey Killion-Letran, Program Field Representative, LIHEAP, OK Dept. of Human Services Lisa Goben, Energy Programs Compliance Officer, Oregon Housing & Community Services Daniel Bausch, Project Director, APPRISE

This session will cover all the available resources for LIHEAP and energy assistance program administrators, including LIHEAP Clearinghouse, National Energy Assistance Referral, Peer-to-Peer Network, LIHEAP Virtual Library, the Data Warehouse, and LIHEAP website Navigator. Each speaker will provide a brief demonstration of each resource as well as discuss the information available. In addition this session will provide both utility and LIHEAP terms as well as provide a look into what is common nationwide and what may vary between states.



14 | Utility Affordability Roundup | 2019 NEUAC Annual Conference

Detailed Schedule

Detailed Schedule

5:00 p.m. - 5:30 p.m. NEUAC Annual Membership Meeting Fort Worth 6-8

All dues-paying members are encouraged to attend the annual membership meeting.

5:30 p.m. - 6:30 p.m. NEUAC Member Reception - Garden Soiree

Sundance Terrace

A special members-only reception to celebrate participation in NEUAC! Cocktail party attire is welcome. Attendance at the Annual Membership Meeting is required.

Tuesday, June 4, 2019

7:00 a.m 8:00 a.m. Texas Ballroom, Foyer	Breakfast / Exhibits
8:00 a.m 9:15 a.m. Texas Ballroom	§ Dialogue with the Feds

The U.S. Department of Health and Human Services' Office of Community Services oversees more than \$3 billion per year in funding for the Low Income Home Energy Assistance Program (LIHEAP) in 50 states and the District of Columbia, five insular areas and approximately 160 direct funded Tribes and Tribal Organizations. Representatives of this office will discuss LIHEAP funding and answer attendees' questions on administrative and programmatic issues.

9:30 a.m. - 10:30 a.m.

Session 5

5A § Undocumented Customers Dilemma Texas A-D

Moderator: Greg Seitz, Manager, Customer Service, New Jersey Natural Gas Presenter: Xiomara Guevara, Esq., Executive Director, Morris County Hispanic Affairs

This session will focus on the eligibility dilemma of households where one or more members are undocumented, demonstrating effective methods for outreach and support to families eligible for LIHEAP.

§ The Water Affordability Crisis 5B Fort Worth 4

Moderator: John Rich, Executive Director, Mid America Assistance Coalition **Presenters:** Karyn Riley, Director of Intergovernmental Relations, Washington Suburban Sanitary Commission Hugh Wooden, Senior Analyst, Financial Division, Kansas City Water Services

This session focuses on the increasing water affordability crisis and potential solutions. Experts in the public water and utility assistance sectors will elaborate on the growing need for water affordability policies and programs, summarize current policy discussions, and demonstrate how water affordability can be realized through a multi-factored approach that includes rate design, establishing a fund for water utility assistance, and other innovative strategies and partnerships.

Incorporating Financial Management and Energy Education into Low-Income Energy Programs **5C** Fort Worth 5

Moderator: Matthew Lyons, Project Director, APPRISE Presenters: Keelie Gustin, Director of Energy Assistance Programs, Miami Valley Community Action Partnership Sandra Mattavous-Frye, People's Counsel, DC Office of the People's Counsel Cami Caudill, Director of Affordability Solutions, Fuel Fund of Maryland

This session shows how financial management and energy education can empower clients to take control over their engagement with energy assistance and efficiency programs. Ms. Gustin will describe how her agency works with clients to help them understand the benefits of energy assistance and to demonstrate the value of responsible participation in the programs made available by LIHEAP and PIPP. Ms. Frye will highlight the tools that the DC OPC uses to educate low-income consumers about energy assistance and energy efficiency. She recommends that public advocates should deploy best practices in consumer education to inform consumers of ways to reduce their energy burden. Ms. Caudill will describe the Watt Watchers energy conservation workshop that focuses on empowering clients to take ownership of their electricity usage by identifying behaviors that can lower their energy bill and thereby become stronger stewards of their energy dollars.

5D Taking Care of You First: Addressing Nonprofit Employee Mental Health Fort Worth 1-3

Moderator: Kimberly Warrick, Chief Operations Officer, New Jersey SHARES Presenter: Britt Pomush, Low-Income Weatherization Program Manager, WA Department of Commerce

Frontline staffpersons often have big hearts and big shoulders. The strain can take a toll on their own mental strength. This session will explore how to recognize signs of mental fatigue and take care of staff who help clients most in need.

5E Flexibility with LIHEAP and Drafting Policy - TRIBAL TRACK Fort Worth 6-8

Moderator: Monica Toya, Administrative Assistant, Pueblo of Jemez Senior Citizens Program/LIHEAP **Presenter:** Lauren Christopher, Director, Division of Energy Assistance, U.S. Department of HHS

Representatives from the U.S. Department of Health and Human Services will provide an overview of the responsibility and flexibility of the LIHEAP block grant. Tribal LIHEAP Coordinators will receive practical guidance on developing programs and drafting policy specific to the needs of individual tribes.



Detailed Schedule

Detailed Schedule

10:45 a.m. - 11:45 a.m.

Creating Impact-Driven Community Partnerships 6A Texas A-D

Moderator: Sheila Ruffin, Attorney Advisor, Federal Energy Regulatory Commission Presenters: Karen Clunas, Consultant, Customer Relations Specialist, Peoples Natural Gas Dave Defide, Manager, Customer Programs, Duquesne Light Company

Session 6

This session will walk participants through the process of creating community partnerships that build bridges, increase impact, and enhance customer experiences. Learn how to identify community partners that will provide valuable insight into program development and design. Increase the awareness of utility programs that add value within the community. The session will showcase best practice community programs to assist income-eligible customers while increasing community and utility partnerships.

Using Technology to Advance Energy Efficiency **6**B Fort Worth 4

Moderator: Kim Rikalo, Manager, Special Assistance, SMUD

Presenters: Dave Rinebolt, Interim Executive Director, Ohio Partners for Affordable Energy Peggy Coleman, Independent Consultant, Coleman Business & Marketing Consulting Group

This session will focus on how smart meters can be used to advance energy affordability, as well as pitfalls to be aware of and explore. Dave Rinebolt will speak about the cost-effectiveness of smart grid investments, and will discuss the pros and cons of smart meter implementation for both utilities and vulnerable families. Peggy Coleman will speak about her involvement in California's transition to Time-Of-Use (TOU) rates for all customers and efforts to measure and mitigate the impact of these new rates on low-income customers. She will speak about the results of pilot programs and targeted outreach and engagement efforts to reach low-income communities.

§ How LIHEAP Performance Management is Increasing LIHEAP Program Success **6C** Fort Worth 5

Moderator: Holly Ravesloot, Energy Policy and Evaluation Branch Chief, U.S. Department of HHS Presenters: Melissa Torgerson, Principal, Verve Associates

Kevin McGrath, Project Director, APPRISE

Kenley Farmer, Associate Director, DC Department of Energy & Environment

Tracy Desmarais, Fuel Assistance Program Administrator, NH Office of Strategic Initiatives

States are now required to collect and report LIHEAP Performance Management data to the U.S. Department of HHS. These data furnish valuable information about demographics and impact. Ms. Torgerson will describe the work that she is doing with the Tennessee LIHEAP program to make direct use of performance data to tailor benefits to individual household energy burden. Mr. McGrath and Ms. Farmer will present the findings from a study of energy burden that identified ways to increase the fairness and effectiveness of DC's LIHEAP program. Ms. Desmarais will present information on how New Hampshire is using their performance measurement data to make important changes to their LIHEAP program, including re-examining their benefit matrix and working to update their information systems to collect data that will allow them to better serve their clients.

Reaching the Unreachable: Strategies for Serving Those with Challenging Circumstances - TRIBAL TRACK **6D** Fort Worth 1-3

Moderator: Katrina Metzler, Executive Director, National Energy & Utility Affordability Coalition **Presenters:** Andrew Binegar, Executive Director, Pickaway County Community Action Agency Karen Dunn, CSBG Program Manager, WA Department of Commerce

This session will present ideas for outreach to clients who need our services, but are often the most difficult to access. Some examples include homebound clients, clients with mobility issues, rural clients, tribes, and clients for whom language or literacy may be a barrier. Learn from experienced nonprofit program leaders what works to successfully seek out, meet, and serve difficult-to-reach clients.

6E Help the Customer, Help Your Bottom Line: Risks and Benefits Fort Worth 6-8

Moderator: Brenda Gomez, Energy Assistance Coordinator, Atmos Energy **Presenter:** Greg Sawyers, Director, Customer Relationships, Citizens Energy Group

This session will provide examples of how one utility is engaging and identifying low-income customers, even those that have not applied for LIHEAP. Engagement strategies will be discussed and they will share the results. This initiative directs customers to agencies, programs, services, and assistance geared specifically to them. They will also discuss how they collaborated with nonprofits when filing their most recent rate case which includes a request for a discounted rate for water/wastewater, ideas on ways to increase funding to its Fuel Fund and how they used data to make their case. They will talk about the risks and benefits of each of these topics.

11:45 a.m 1:45 p.m. Texas Ballroom	Lunch / 2020 NEUAC Cont
2:00 p.m 3:00 p.m.	Session 7

7A **Poverty and Vulnerable Populations Roundup: Bridges out of Poverty** Texas A-D

Moderator: Mary Wilkins, Social Services Director, Salvation Army WMNI Division **Presenter:** Jeffrey Diver, Executive Director, Supports to Encourage Low-Income Families (SELF)

Hear a brief summary of previous track sessions and engage in an interactive and participatory presentation about the interplay of these vulnerable populations within the Bridges Out of Poverty framework. The presenter will provide an indepth look at a few key concepts for working with energy customers who are experiencing poverty.



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Detailed Schedule

ference Teaser & Awards Ceremony

Detailed Schedule

Roundup of Best Practices and Panel Discussion **7B** Fort Worth 4

Moderator: Ariel Drehobl, Senior Research Analyst, Local Policy, ACEEE Presenters: John Rich, Executive Director, Mid America Assistance Coalition Ariel Drehobl, Senior Research Analyst, Local Policy, ACEEE

This session will provide a brief summary of the topics discussed during the Track B sessions focused on achieving energy and water affordability. These topics will include energy efficiency and renewable energy investments, health and workforce development, technology, and energy and water affordability policies and programs. After the brief summary. session attendees will have the chance to brainstorm solutions, ask questions, and suggest topics to explore during next year's conference. The session will focus on open dialogue and group collaboration.

Brainstorming Solutions to Policy, Advocacy, and Education Issues 7C Fort Worth 5

Moderator: David Carroll, Managing Director, APPRISE

Presenters: Holly Ravesloot, Energy Policy and Evaluation Branch Chief, U.S. Department of HHS

Dan Alderson, Director of Energy Assistance, Atmos Energy

Chere Coleman, Program and Policy Director, Michigan Community Action

Jackie Berger, President, APPRISE

John Harvanko, Director, Office of Energy Assistance Programs, MN Department of Commerce Bonnie Temme, Community Relations Program Manager, Salt River Project

This session gives attendees the opportunity to participate with speakers to brainstorm solutions to two important Policy, Advocacy, and Education issues. Attendees will review a list of six important policy issues and select three to discuss in detail. Attendees will propose potential solutions and hear expert panelists react to some of the proposed solutions.

7D FUNdraising Wrap-up Fort Worth 1-3

Moderators: Jody Robertson, Director of Communications, Dollar Energy Fund

Debbie Brown, Director of Development, Marketing & Communications, Fuel Fund of Maryland Presenters: Denise Stepto, Chief Communications Officer, Energy Outreach Colorado Toni Gianforti, Retired Director of Institutional Giving, Meals on Wheels of Central Maryland Tess Richey, Senior Manager of Development, Energy Outreach Colorado

Kelly Caplan, Community Outreach & WAFF Manager, Washington Gas

Join us for a FUN and informal Q&A session where track leaders, facilitators and attendees (YOU!) will share their favorite FUNdraising ideas, opinions, and resources that have worked for their nonprofit. We also want to hear what hasn't worked and where you might need some additional support or suggestions from your colleagues. Whether you might need an assist with a FUNdraising appeal letter, identifying new Board members, or just have general FUNdraising question(s), this is the time to learn from one another in a FUN and informal environment.

7E It's a Texas Roundup Y'all Fort Worth 6-8

Moderators: Kim Rikalo, Manager, Special Assistance, SMUD Rhonda Harper, Stakeholder and Community Engagement Manager, Citizens Energy Group **Presenters:** Greg Sawyers, Director, Customer Relationships, Citizens Energy Group Lauren Christopher, Director, Division of Energy Assistance, U.S. Department of HHS Libby Perl, Analyst in Housing Policy, Congressional Research Service Casey Killion-Letran, Program Field Representative, LIHEAP, OK Dept. of Human Services

Did you miss a session because there was so many great workshops to choose from? This session will provide you with the opportunity to hear some of the most important and useful takeaways from the presentations given the last few days for newbies. This will be an interactive session geared to provide you with tools, suggestions, and resources to help you along your journey.

3:15 p.m. - 4:15 p.m. **§ LIHEAP 101** Fort Worth 5

Presenters from the Congressional Research Service and LIHEAP Clearinghouse will provide an overview of the LIHEAP program. They will begin by discussing the energy programs that preceded LIHEAP and detailing the basic requirements established by LIHEAP statute and regulations. They then will discuss how these requirements set the framework for program administration and delivery.

5:00 p.m. - 7:00 p.m. Texas Ballroom

Boots and Bandanas Bash

Featuring a live band, line dancers, a selfie mirror, delicious food, and more! Cowboy/cowgirl attire welcome.

Wednesday, June 5, 2019

7:00 a.m. - 9:30 a.m. Texas Ballroom

Breakfast / Being Elite: The Way of a Champion Presenter: Jared Alderson

Speaker Jared Alderson will energize and uplift conference attendees by sharing how one can achieve greater results in everything you do, with the use of positive thoughts and brain behavior. Utilizing these thoughts and behaviors to help access the "ZONE" on a daily basis, will help allow one to move forward not only as good or great, but as ELITE.

10:00 a.m. - 11:30 a.m.

The NEUAC Conference is an opportunity to network both regionally and nationally. NEUAC will host a regional strategy session at "Utility Affordability Roundup: 2019 NEUAC Conference." These sessions will be focused on driving change at NEUAC to benefit nonprofit, government, tribal, and utility stakeholders and members. Ideas will be developed to improve current activities and create new opportunities for these entities through NEUAC.

11:30 a.m.

Roundup Wrap-up. Event Concludes



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Detailed Schedule

Nonprofit/Government/Tribe and Utility Regional Summits

Hotel Map - Level 2





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Thank You 2019 Sponsors!

Special Thanks

NEUAC staff is grateful for the tireless efforts of our volunteers who deserve much more than special thanks:

2019 Conference Co-Chairs:

Kim Campbell & Patrick Johnson, TXU Energy Dan Alderson & Faye Kinner, Atmos Energy Tanya Jones, HeartShare Human Services of New York

A/V Coordinator:

Marc Dunning, Florida Power and Light

CLE Coordinator:

Edward Gingold, Esq., Federal Energy Regulatory Commission

Heartfelt thanks also to our board members, track leaders, speakers, moderators, volunteers, local planning committee members, in-kind supporters, and raffle and silent auction contributors.

THANK YOU!

Exhibitors

Be sure to stop by the exhibit area and meet with representatives from the following companies:

- Active Telesource/Community Appointments
- AM Conservation Group
- CommunityConnect Labs
- Computer Data Services
- Fort Worth Convention Services Bureau
- Hancock Software
- Heat Smart Campaign
- JAI Software
- LIHEAP Data Warehouse Station, hosted by APPRISE
- National Energy Foundation
- Project Energy Savers
- Salvation Army
- U.S. Department of Energy LEAD Tool Station

Fort Worth welcomes visitors from around the world to experience the great American West and rich arts and culinary treasures. There are more than 92 attractions in a 10-mile radius of downtown. The city offers the No. 1 downtown in America and is located minutes from AT&T Stadium and DFW International Airport. As one visitor says, "unpretentious, laidback, and charismatic in all the right ways." For a weekend, business meeting, sports or family reunion, Fort Worth offers experiences to last a lifetime.

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- See priceless masterpieces in the world-renowned Cultural District
- Explore the true Western Heritage in the Stockyards National Historic District
- Shop and dine in the 35-block Sundance Square or catch a show at Bass Performance Hall
- View more than 7,000 animals at the nationally top-ranked Fort Worth Zoo
- Experience life in the fast lane at Texas Motor Speedway
- Need ideas on things to do in Fort Worth? Visit www.fortworth.com.





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Utility Affordability Roundup | 2019 NEUAC Annual Conference | 25

Fun in Fort Worth

- City of Fort Worth, TX

• Dine in one of the many estaurants offering everything from Tex-Mex and BBQ to world-class cuisine



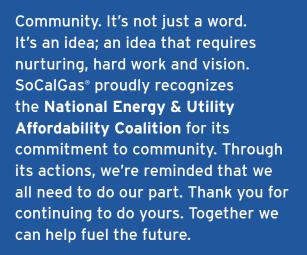


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New Applications C	reated per Week		Approved Funds vs F All tim	Requested Funds e	
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NEUAC 2020 "United We Stand"

Omni Shoreham Hotel | June 29 - July 1, 2020

