

XCEL ENERGY PARTNERS IN ENERGY AND THE ROLE OF TOOLKITS

Xcel Energy Partners in Energy provides communities in Colorado, Minnesota, and Wisconsin services to develop Energy Action Plans, along with assistance to implement those plans. Each community has its own unique energy needs and priorities, and Partners in Energy tailors its services to complement each community's vision. More and more communities now realize that energy planning plays a critical role in helping them reach their goals. The benefits of wise energy choices are diverse. By working with residents, businesses, and even in their own government facilities, a community can reduce energy and lower bills, promote renewables, drive resource conservation, and contribute toward greenhouse gas (GHG) emission reduction goals. Partners in Energy helps address the challenge of identifying local priorities and structures a path forward, leveraging all available resources. As part of this offering, we have developed several toolkits to help communities reach their energy goals.

For more information about other available toolkits or to customize any of the resources with your community's unique brand identity, contact your Partners in Energy community facilitator.

To learn more about becoming a Partners in Energy community visit XcelEnergyCommunities.com.

USING THIS TOOKIT

Xcel Energy's Underserved Populations Toolkit will help you leverage resources to engage and communicate with underserved populations to promote energy efficiency activities. It includes a step-by-step guide on developing and implementing strategies to engage these populations.



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Overview

This toolkit is intended for communities wishing to provide energy efficiency and costsaving measures to underserved populations. Many Partners in Energy communities have dedicated staff and networks of nonprofit organizations and agencies focused on underserved populations. This toolkit seeks to develop opportunities to integrate existing community efforts for underserved populations into Partners in Energy implementation activities. It provides a step-by-step process for identifying existing resources, developing, and implementing strategies, and conducting outreach.

WHO ARE OUR UNDERSERVED POPULATIONS?

Communities and people who are underserved face systemic and institutional barriers which prevent them from accessing and/or receiving the same quality of services as people not facing the same barriers. These barriers may be economic, cultural, and linguistic and may be discriminatory in areas such as racism, ageism and ableism. Examples of underserved populations and associated barriers are provided in the table below. Note that this is not a comprehensive list of underserved populations or potential barriers.

Underserved Population	Potential Barriers
Persons with Physical Disability	 Limited ability to install upgrades Limited ability to read website, watch videos, or read print material that is not accessible to blind and deaf users
English as a Second Language	 Lack of outreach materials in their primary language Lack of program instructions online or by phone in their primary language Lack of energy-related information through preferred communication networks
Low-Income Households	 Lack the capital to make improvements Lack of credit options to finance improvements Older homes that require health and safety upgrades (e.g., asbestos) before energy upgrades can be implemented
Racial/Ethnic Minorities	 Discrimination leading to distrust in government and utilities Lack of energy-related information through preferred communication networks
Renters	 Lack of property rights to install energy upgrades Lack of cost savings from energy improvements if utilities are not billed separately by usage
Seniors	 Limited technology knowledge/access – cannot sign up online for programs Limited physical ability to install upgrades

TOOLKIT PROCESS

Once the Energy Action Team has identified underserved populations as a focus area, it's important to build strategies for addressing community identified needs by working with partner organizations and conducting outreach. The toolkit will guide users through determining the most pressing gaps and needs for these households through the following steps:

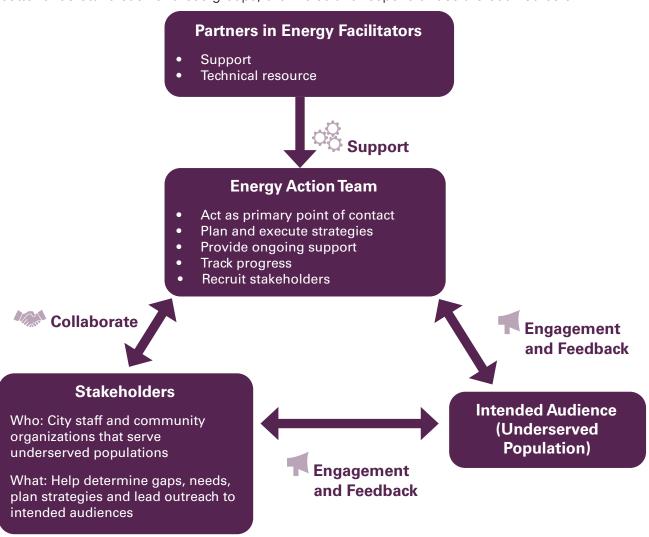
STEP 01 STEP 02 STEP 03 STEP 04 STEP 05 Set a Clear Understand Develop Implement the Needs of Focus & Identify Goal Strategy Strategy & Undeserved Your Strategy & Outreach Plan Track Progress Populations

ONGOING Identify & Engage Stakeholders

This process can be iterative or concurrent as needed. It is designed to provide a guideline for planning your community's initiative and should be customized to best serve your needs.

Underserved Organizational Chart

There are many potential stakeholder groups involved in the process outlined below. To better understand each of these groups, their roles and responsibilities are outlined below:





Guide to Reaching Underserved Populations

ONGOING: IDENTIFY & ENGAGE STAKEHOLDERS

Stakeholder engagement should occur throughout the entire strategy planning and implementation process. In addition to helping implement your strategy, stakeholders can help identify community needs and provide valuable input on the types of underserved populations in your community. Community engagement efforts will be most effective when you and your stakeholders have a strong collective knowledge of your intended audience and existing resources to leverage.

Stakeholders should include a range of representatives from non-profit organizations, businesses, and city or county staff, trusted community organizations, as well as members of the intended audience themselves to provide diverse ideas and perspectives. If engaging members from the underserved communities, consider providing financial compensation, such as a stipend for their time, covering transportation costs, or other associated expenses.

Consider the following organizations and stakeholders:

- Housing authority and affordable housing providers
- Public safety officials (fire, police)
- Food pantries
- Faith-based organizations
- Community action agencies
- Schools & after-school programs
- Local commissions or task forces, such as human rights, diversity, equity, and seniors
- Non-profits or charitable organizations serving the intended
- Senior centers or organizations serving seniors



Ongoing Stakeholder Engagement

Stakeholder engagement should be ongoing throughout the process. We suggest identifying stakeholders as early as possible, but with more research in Step 2 and as you refine your strategy, you may find the right people are not in the room and need to be included to implement your chosen strategy. Likewise, once you have chosen a strategy in Step 3, planning and implementing the strategy may require additional stakeholders.

If portions of your intended audience speak English as a second language or no English at all, it will be crucial to engage stakeholders that can communicate with your community's populations in-person, on the phone, and through writing. These stakeholders will need to become an integral part of implementing the strategies planned by the Energy Action Team so there is a trusted, accessible resource.

When you invite your stakeholders to participate in this exercise, be sure to communicate why their involvement is important (e.g. different perspective, relevant program or service) in the process and how they can remain engaged throughout implementation.



- Stakeholder Meeting Invitation Email Template
- Potential Organization Partners

STEP 1: SET A CLEAR GOAL

Before you start to reach out to your underserved populations, work with your stakeholders to set a clear goal that help you focus your efforts as you build out your strategy. The goal may be quantitative, such as an increase in energy savings or program participation, or it may be more qualitative, such as strengthening your team's relationship with underserved communities.

STEP 2: UNDERSTAND THE NEEDS OF YOUR UNDERSERVED POPULATIONS

Once you set your goal, you can start to use data to understand the needs of your underserved populations and identify the gaps in services, policies, and programs. Include your stakeholders early in this process to help you identify the underserved populations in your community, verify your findings from data research, and identify additional barriers and opportunities within these populations.

Consider hosting virtual or in-person meetings to work on these steps together or react to findings and discuss next steps.

Baseline Assessment

Start with a baseline assessment to help you understand existing policies, programs, and resources to inform your strategy planning (Step 4). The baseline assessment will also help you understand the types of underserved populations in your community, so your strategies have the biggest impact. Based on your findings, you may need to customize your stakeholder engagement to include people and organizations that focus on the underserved populations you have identified through the process of establishing a baseline.

See the resources section for the Guiding Questions Worksheet to assist you. Ask your stakeholders to complete this sheet separately, or with you, to gain additional perspectives. These questions can be answered directly or used as a guide.

Gather Data

Data can be a powerful tool to gain key insights about your underserved populations, including which segments may have the biggest need for energy efficiency. In addition to looking at program participation data (provided through Partners in Energy), using demographic and housing data can also help with decision-making, generate empathy, and garner support from external partners.

Data sources we encourage you to use are:

- Xcel Energy's Partners in Energy data reports
- Low-Income Energy Affordability Data Tool
- American Community Survey

Most data tools allow you to customize the data to understand the different segments of your community. Suggested data to research may include:

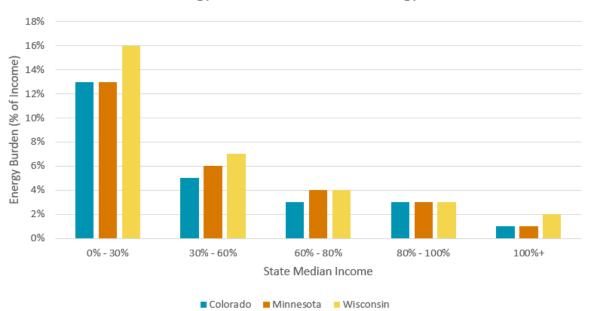
- Energy burden
- Poverty status
- Monthly housing costs
- Age

- Housing tenure
- Housing age
- Language spoken at home

You can also compare these data to each other to look for any significant needs (for example, comparing energy burden versus tenant age may show that seniors have a disproportionately high energy burden compared to younger populations). See the resources section for the Data Tools Overview to guide you through the different tools available and support for interpreting the data.

Energy burden is defined as the percentage of gross monthly income spent on energy costs. While energy burden may vary across communities, data show that energy burden in low-income households is three times greater than in non-low-income households (ACEEE, 2016). Figure 1 shows the energy burden in relation to income in each of the states Partners in Energy serves. As shown in the chart, the lowest income bracket, which makes 30% or less than the area median income, experiences energy burden at a higher rate than does any other income bracket. This energy burden is 12% of monthly income in Colorado, 13% in Minnesota, and 16% in Wisconsin.

Energy Burden in Partners in Energy States





Research Benefits and Barriers to Participation

A benefits and barriers assessment can help the team understand the different challenges underserved populations in your community face and determine what will motivate specific populations to take the action you want to encourage. We recommend you complete this exercise in person with your stakeholders, since the discussion is more interactive and collaborative. Some example barriers and potential solutions for various underserved groups are shown in the table below. This list is not intended to be exhaustive and your group should assess the barriers and potential solutions of your chosen communities independently.

Underserved Population	Example Barrier	Example Solution
Seniors	Limited technology knowledge/access – cannot sign up online for programs	Provide phone numbers or in-person sign-ups for programs and services
English as a second language	Lack of outreach materials in their primary language	Develop outreach materials and offer implementation services in other languages
Persons with physical disability	 Limited physical ability to install upgrades Limited ability to read website, watch videos, or read print material that is not accessible to blind and deaf users 	Home Energy Squad technicians to install upgrades during a home visit

See the resources section for a Barriers and Benefits Worksheet, which includes directions for completing a benefits/barriers assessment.



Review your Baseline Assessment

Once you've completed the baseline assessment, gathered data, and identified barriers and potential solutions, you should be equipped with the information to understand:

- Who are your underserved populations?
- What are the policy, program, and service gaps those populations face?
- What challenges do underserved populations face?
- What resources do we have through Xcel Energy and other community partners to address these challenges and gaps?



Ongoing Stakeholder Engagement

Should you choose to meet with your stakeholder group to review the information together, below are some helpful discussion questions:

- Did any of the information surprise you?
- Do the data support focusing on the populations you initially expected were underserved? Is there a different population segment you should be considering?
- Are there programs or services to serve this segment?
- Are there barriers preventing underserved populations in your community from using these programs? If so, how can you show the benefits to motivate participation?

Once you are grounded in the underserved population segment(s) to serve and the resources and programs available, you and your stakeholders can start to plan your strategy.



- **Guiding Questions Worksheet**
- Data Tools Resource Worksheet
- Benefits & Barriers Worksheet

STEP 3: NARROW YOUR FOCUS AND IDENTIFY YOUR STRATEGY

Once you've established a baseline assessment, gathered data on the underserved population(s) in your community, and identified benefits and barriers, the next step is to narrow your focus and determine your intended audience and the strategy (or strategies) you will use to.

The intended audience can include an entire segment of underserved populations, such as all low-income households, or a smaller segment, such as senior citizens on a fixed income or non-English speaking populations. The research and worksheets completed in step 2, along with the stakeholder group, will help narrow down an audience to focus on.

When determining what strategies to implement, consider the level of engagement required for the intended audience. Some strategies may have the goal of simply raising awareness of available resources, while others may ask people to change their behaviors. The table below describes a range of potential engagement (Blue Sky Consulting Group & CommonKnowledge, 2012):

Possible Goals for Engagement

Awareness I	Enrollment/ Usage	Education/ Involvement	Motive Change	Empowerment
to services, in education, in	nroll residents n programs or ncrease use of ounty Services	Teach residents about important issues/or involve them in decision-making	Inspire changes to behavior	Enhance the community's ability to identify and mobilize around self-

Some example strategies may include:

- Increase awareness of existing resources (Awareness)
- Increase participation in Xcel Energy low-income programs (Usage)
- Reduce energy burden through energy efficiency and conservation (Motivate Change)
- Establish community solar garden for intended audience (Empowerment)
- Form a coalition to address energy burden in the community (Empowerment)
- Train local volunteers on renewable energy subscriptions to do targeted enrollment campaign (Enrollment/Empowerment)

Strategy Example: Partner with Nonprofit Organizations and Housing Authority to Share Information About Free Home Energy Audits

Bloomington, MN

The City of Bloomington worked with its Housing and Redevelopment Authority (HRA) and local community organizations to promote free Low-Income Home Energy Squad visits to qualified Bloomington residents. The City conducted outreach using local community organization's social media channels and leveraging the HRA's relationship with property managers of their buildings to get the word out using postcards and posters in common areas to promote the free visits.

STEP 4: DEVELOP STRATEGY AND OUTREACH PLAN

Once you have identified your intended audience and strategy, the next step is determining specific actions to take to implement the strategy. Be sure to consider metrics for tracking progress, such as number of people signed up for a program, number of flyers handed out an event, or energy savings per customer. The strategy and outreach plan template in the resources section will guide you through some of the things to consider as you develop the strategy.

Outreach will be an important component of implementing the selected strategies and will vary depending on the intended audience. Your audience may not use the same types of communication that your other community engagement efforts have used, such as local government social media. If your intended audience speaks multiple languages, you will need to translate materials, social media posts, videos, or presentations, and ensure implementation providers can also speak the language. For example, if you choose to target outreach to the Somali population in your community for Home Energy Squad® visits, flyers and other outreach should be available in Somali, and implementers should have a translator available. Some questions to consider about your audiences include the following (Blue Sky Consulting Group & CommonKnowledge, 2012):

- Where do they live, work, and congregate?
 - What are the preferred communication styles?
 - What languages are spoken and read?
 - What are levels of educational attainment?
 - Through what family or community structures does effective communication take place?
- Who do they trust?
 - Who are the leaders in their community?
 - Which community groups or organizations?
 - Which government organizations or representatives?
- What are the community values? (relate to energy use/needs)
- What are the challenges? (relate to energy use/needs)
- What are the priorities? What do they need?

Outreach should enlist existing channels and trusted organizations within the intended audience as much as possible. Some ways to leverage these resources might include:

- Providing communication materials to hand out during normal interactions
- Providing talking points to discuss energy resources
- Collaborate to host an event, or have a table at an existing event
- Collaborate on a social media campaign
- Collaborate to host an educational workshop or community meeting

Strategy Example: Manufactured Home Outreach Targeting Spanish Speaking Population

Fairbault, MN

City of Faribault, MN, in partnership with local nonprofit Growing Up Healthy and Home Energy Squad®, conducted targeted outreach to income-qualified residents at manufactured home communities. The goal was to deliver free Home Energy Squad visits to qualified households that were accessible to both English- and Spanish-speakers. All materials were translated to Spanish and distributed via existing channels or as door hangers. Sign-ups for the visits were done on the spot, rather than directing to another source, making it easy for residents. Visits were also done with translation as needed. Prior to a full rollout of the strategy, a pilot was conducted to test the resources and outreach activities. The pilot and full rollout of outreach was successful because of the local partnerships and use of existing channels.

If existing organizations or channels cannot be used it will be very important to understand the questions listed above. Keep in mind that you will need to take your message directly to your intended audiences. This might include tabling at local stores, shelters, food banks, senior centers, churches, parks, community cultural centers, etc., to provide information as people are going about their normal daily routines.

When hosting events, be sure to consider what challenges people may face in attending an event. There are often simple solutions to some of these challenges, but they should be planned for in advance to gather proper resources and inform the community of the availability of resources. Some challenges to consider include, but are not limited to, the following:

- No childcare available
- Inconvenient time or place
- Mealtime conflicts
- Lack of transportation
- Religious conflicts

Additionally, explore opportunities to incorporate culturally affirming features into your events. For example, you may want to work with the community to organize a potluck to encourage participation. The Strategy & Outreach Plan Template also includes a section to plan outreach activities, including consideration of timelines, challenges and how to address them, and necessary resources.



• Strategy & Outreach Plan Template

STEP 5: IMPLEMENT STRATEGY AND TRACK PROGRESS

Once the Energy Action Team has developed an actionable strategy and outreach plan, implementation of the strategy can begin! The duration of implementation will vary by strategy, but you should have a definitive start and end date. If the strategy timeline is ongoing, set milestones to help track progress of how implementation is going.

During implementation, the Energy Action Team or designated lead should keep track of progress based on the targets and metrics identified during Step 3. It may also be beneficial to track points of contact if this is not already a metric. The team should work with partner organizations to track metrics to gauge the impact of the strategy, such as number of points of contact, flyers handed out, social media analytics, etc.



- Tracking in Strategy & Outreach Plan Template
- Flyers
- Social media content

NEXT STEPS

Once the implementation period is complete and outcomes have been tracked, you can gauge your progress and successes. In addition to reviewing targets and metrics, it is also important to assess what went well, what unexpected barriers did you encounter, and what can be improved in the future. The team is encouraged to share the information broadly amongst partner organizations and via social media channels.

From here, the Energy Action Team can reconvene to determine how to scale the strategy effort for a larger impact, plan new strategies if desired, or move on to other Partners in Energy efforts.





RESOURCES

Templates and Worksheets

- Stakeholder Meeting Invitation Email Template
- Potential Organization Partners
- Data Tools Resource Worksheet
- Guiding Questions Worksheet
- Benefits and Barriers Worksheet
- Strategy and Outreach Plan

Minnesota Specific Resources

- Xcel Energy Program Resources
- Minnesota State Specific Resources

Colorado Specific Resources

- Xcel Energy Program Resources
- Colorado State Specific Resources

Collateral Examples

- MN Underserved flyer (2 pages)
- MN Home Energy Squad Poster
- CO Home Energy Squad Overview (Spanish and English)
- CO Weatherization flyer (2 pages, half size)
- Social Media Content

Stakeholder Meeting Invitation Email Template

SEND AS A CALENDAR INVITATION THAT SPECIFIES MEETING TIME AND DATE

SUBJECT: [Community Name] needs your help reaching underserved members of our community

Dear [Name],

[Identify yourself and explain your role in the effort]

[Explain your objectives for this effort.] Xcel Energy's Partners in Energy is supporting this activity through a larger energy planning effort that aims to:

- Develop and document our community's long-term energy vision
- Identify the appropriate goals and strategies to help achieve that vision
- Engage and motivate our community to take action to achieve our goals
- Monitor and track our results
- Celebrate our achievements and promote our successes
- Carry forward our energy momentum for the long term

We need your help identifying community needs and believe you can provide valuable input on the types of underserved populations in our community and how to effectively reach them.

We hope you can join us in this exciting opportunity. Please RSVP to me directly or accept the meeting invitation to let us know if you will be able to attend.

Sincerely,

[your contact information]

Potential Organization Partners

Non-profits and charitable organizations that are already providing social and economic services to the intended audience will be important stakeholders to engage for outreach and strategy implementation. These organizations have built rapport, trust, and communication channels, within these communities, that will be useful when implementing your strategy.

Food pantry: an individual site that distributes bags or boxes of food directly to those in need who reside in a specified area. Their commitment is to provide food to those in need. To identify a food pantry in your community:

- In Minnesota, visit Second Harvest Heartland
- In Colorado, visit Hunger Free Colorado

Affordable housing providers: Housing providers who manage properties that are affordable to low- and moderate-income households. Sometimes these properties qualify for federal programs, such as the Housing Choice Voucher program. To identify affordable housing communities in your city:

- In Minnesota, use the Low Income Rental Classification (LIRC) list (see 2019 LIRC Assessors Report)
- In Colorado, visit 211 Colorado Low Income/Subsidized Private Rental Housing or contact DOLA - Housing

Community Action Agency (Action Partnership): Community Action Agencies provide local, state, federal, and private resources to help individuals and families who have low incomes. Services include Head Start, Energy Assistance, Weatherization, nutrition programs, and financial assistance.

- In Minnesota, visit the Minnesota Department of Human Services website to find a Community Action Agency that serves your community.
- In Colorado, visit the Colorado Department of Human Services website to contact your county office. Energy Outreach Colorado and Colorado Energy Office can connect you to other organizations providing assistance.

Charitable Organizations: A nonprofit organization whose primary objectives is philanthropy, social well-being, or service the public interest. Visit GuideStar to search for nonprofit charitable organizations located in your community.

Faith Organizations: Some faith-based organizations offer targeted services to their local community, including day-care, food pantry, and financial assistance. Contact local faith organizations to understand what types of services they offer and if would be willing to partner on a strategy.

Resale and secondhand stores: A store that sells gently used products at less-than-new prices. These stores may have common areas or community boards where flyers, posters, or handouts could be distributed.

Other community organizations can be found through 211:

- In Minnesota, visit https://www.211unitedway.org
- In Colorado, visit https://www.211colorado.org/

Data Tools Overview

Use these resources to help identify underserved populations and their needs, including which segments have the biggest need for energy efficiency.

XCEL ENERGY PARTNERS IN ENERGY DATA REPORTS

As a Partners in Energy community, you have exclusive access to your community's energy consumption and savings data. During planning, you'll receive a baseline energy analysis broken down by sector. During implementation, you'll get bi-annual reports of your community's participation rates and savings.

Use these reports to understand the participation rates and savings in Xcel Energy's programs. If you aren't sure where to start, ask your Partners in Energy Community facilitator for more information.

How to get this report

Planning phase: review your community's baseline energy use. This data will be available in workshop slides and notes and included in the final Energy Action Plan.

Implementation phase: You'll receive bi-annual reports (mid-year and end of year) once you start implementation. If you just started implementation, refer to your community's Energy Action Plan.

Notable programs

Some suggested programs to look at are shown below. Work with your community facilitator to understand other programs that may be impactful in your community.

Minnesota

- Low-income Home Energy Squad: An in-home visit from local efficiency exports who perform a home energy audit and discuss small energy-saving improvements.
- Home Energy Savings Program: An in-home visit with an energy expert to review ways to lower energy bills. Includes referrals to other energy-saving services and agencies, and possible replacement of old appliances.
- Multi-family Energy Savings Program: This program is for multi-family buildings with more than 5 units, a common entrance, and in-unit kitchens to help the building save energy and tenants live more comfortably.

Colorado

- Home Energy Squad: An in-home visit from local efficiency exports who perform a home energy audit and discuss small energy-saving improvements.
- Single Family Weatherization
- Multi-family Weatherization

Interpretation questions

- Are participation rates higher or lower in low-income programs compared to non-low-income programs?
- Is one low-income program more popular than the others?
- Are participation rates trending higher, lower, or the same over baseline year?

LOW-INCOME ENERGY AFFORDABILITY (LEAD) TOOL

The US Department of Energy created the Low-Income Energy Affordability Data (LEAD) Tool to assist partners with understanding their low to moderate-income community characteristics. The tool provides interactive state, county, and city level worksheets with graphs and data, including number of households at different income levels and numbers of homeowners versus renters. It provides a breakdown based on fuel type, building type, and construction year. It also provides average monthly energy expenditures and energy burden (percentage of income spent on energy).

Using the tool

Visit the LEAD Tool website to get your city, county, and/or state area median income (AMI) data or compare income to the Federal Poverty Level (FPL). We recommend looking at AMI to get a better picture of your community.

Once you've selected your income model, select your state on the map and then choose if you want to view counties, census tracts, or cities. A list will appear on the right-hand side of the screen. Select your county or city and then click the "Compare" button to populate the chart below. You can compare your city or county to the state or another city/county. Comparisons can be removed on the left-hand side under the "Comparisons" box (see Figure 1).

The chart can be customized based on the data you want to look at using the dropdown menus for the primary and

secondary dimensions and left and right axes. Secondary dimensions and the right axis will allow you to compare multiple variables on one chart. A simple chart might compare energy burden (% income) to AMI. Adding variables to this chart would allow you to look at the energy burden versus AMI by renter, or owner-occupied housing, for example. We encourage you to try many variables to see what makes the most sense to look at for your community. If you need assistance, reach out to your community facilitator.

Data to pay attention to

- Percent of household income spent on energy compared to area median income
- Percent of household income spent on energy compared to annual energy expenditure
- Annual energy expenditures by building age, number of units, and housing tenure



Interpretation questions

- Is there a particular building age, number of units, or housing tenure that has a higher rate of energy burden?
- Is there an income bracket that spends more money on energy than others? Does that change by house tenure or building age?

STATE AND LOCAL PLANNING FOR ENERGY (SLOPE) TOOL

This platform, administered by the U.S. Department of Energy (DOE) and the National Renewable Energy Laboratory (NREL), provides data on energy consumption, energy efficiency, and renewable energy generation data for state and local governments. The SLOPE Data Viewer allows users to explore potential and projected energy data by fuel source and by sector in a target geography. Using this tool, energy data can also be overlaid with other measures such as energy costs, demographics, commercial buildings, and transportation.

Using the tool

Visit the SLOPE Tool website and select the "Data Viewer" tab. Use the index on the left-hand side of the screen to navigate among various data points. Note that data availability will vary between state and local levels. The charts can be customized to view existing data and future projections.

Data to pay attention to

- Electricity and Natural Gas Dollars Spent
- Single Family Home Electricity Savings Potential
- Single Family Home Fuel Savings Potential
- Projected Levelized Cost of Energy by Technology

Interpretation questions

- Which energy efficiency measures could result in the greatest amount of cost savings?
- How might renewable energy impact cost savings over time?

EXPLORE CENSUS DATA TOOL

The U.S. Census Bureau's Explore Census Data Tool can help you gather detailed population and housing information about your community. Census data includes information on housing tenure, housing burden (percentage of household income being spent on mortgage or rent), poverty status, income characteristics, language spoken at home, and many other data points that can help you understand your community's demographics.

How to get this data

Use Explore Census Data to download data tables for different data points, including tables broken down into census tract and census block boundaries.

In addition to American Fact Finder, Minnesota communities can also use the Metropolitan Council's Community Profiles to access pre-made census data graphs and tables specific to your community for different data points.

How to use this data

Using the "advanced search" function will let you customize your data by different segments. Choose your geography (where you want to see data for), and then search for topics you are interested in.

Topics to look for

- Tenure by household income
- Language spoken at home
- Poverty status by language spoken at home
- Poverty status by age
- Housing costs as a percentage of income
- Households without computers and or internet service
- Internet service by income

Interpretation questions

- Is there a trend in housing tenure for certain income levels?
- What language is most commonly spoken at home? Is it a high rate of the total households?
- Is poverty status higher in certain age brackets than others?
- Are a lot of households spending a higher percentage of their income on housing?
- Are certain household types or income brackets lacking technology access?

Guiding Questions Worksheet¹

Use this worksheet to establish a baseline of policies, programs, and resources that might exist to help support your strategy. Use these questions as a guide, or answer directly, for the target areas based on your community's Energy Action Plan goals. This could be an individual or group exercise.

Under-resourced Populations

- How is under-resourced defined in your organization?
- What policies or services does your organization have for under-resourced households?
- Does your organization use area median income (AMI), state median income (SMI), or other income-qualifications for programming?
- Is there a city division or department that works with under-resourced populations?
- Does your organization offer financing available to support under-resourced households? (e.g. first-time home buyer loans)
- Are there financial institutions or other lending institutions that have a social mission in your community?
- Are certain income brackets experiencing a higher rate of energy burden? Does this change based on the number of units or age of the building?
- What languages are spoken in your community?
- What is community's poverty rate? Is it higher for certain age groups, housing tenures, or race?

Energy Efficiency

- What are the local or State policies that enable energy efficiency in under-resourced households?
- What is the estimated number of under-resourced households participating in energy efficiency programs relative to the overall community?
- How do low-income program participation rates compare to overall participation rates?
- Does your community offer financing for under-resourced households for energy efficiency?
- List the energy efficiency programs for under-resourced households you're familiar with.

Renewable Energy

- What are the local or State policies that enable renewable energy in under-resourced households?
- What is the estimated number of under-resourced households participating in renewable energy programs relative to the overall community?
- Does your community offer financing for under-resourced households for renewable energy?
- List the renewable energy programs for under-resourced households you're familiar with.

¹Modified from U.S. Department of Energy Better buildings Partner Baseline Assessment Guide. https://www.energy.gov/sites/prod/files/2017/07/f35/Baseline_Assessment_Guide_CELICA.pdf

Benefits and Barriers Worksheet

STEP 1: EXPLAIN THE PURPOSE & DEFINE THE SCOPE

Make sure everyone understands why they are here today and why their involvement is important. If you have data (Step 2 from the Underserved Toolkit), share that with the group.

Ensure that you've defined your intended audience(s) when thinking of barriers and benefits (e.g., seniors, fixed-income households, etc.).

STEP 2: BREAK INTO GROUPS

If your group has more than 6 people, we recommend breaking up into small groups so that everyone has an opportunity to be involved.

STEP 3: BRAINSTORM THE BENEFITS

Everyone should answer the question: What are the benefits to (intended audience) if they increase _____?

- Energy efficiency?
- Renewable energy?
- Energy conservation?

It's very important that this question focus on the benefits to the intended audience. The benefits you are trying to achieve (for example, lower energy use) may be different from your intended audience's benefits (for example, lower out of pocket expenses).

Record responses on the worksheet. Small groups should prioritize their top three benefits.

STEP 4: BRAINSTORM THE BARRIERS

Now answer the question: What might prevent (intended audience) from ?

Record responses on the worksheet. Small groups should prioritize their top three barriers.

STEP 5: BRAINSTORM WAYS TO OVERCOME BARRIERS

For the top 3 barriers, answer the question: What might overcome these barriers? Record responses on the worksheet.

STEP 6: GROUP SHARE-OUT

Ask each group to share their top benefits and barriers. Acknowledge that it is OK to repeat answers from across groups. Record responses.

It's important to acknowledge the benefits and barriers identified and that your working group will consider them in your strategy development and outreach. Explain to the group what the rest of your process will look like and how they could be further involved (if possible) in the planning or implementation of your strategies.

Benefits Brainstorm
What are the benefits of (intended audience) increasing?
Top benefits:
1.
2.
2.
3.
Barriers Brainstorm
What barriers does (intended audience) face with?
A Annat Damers does (intended addience) race with
Top Barriers:
1.
2.
3.
Oversoming Powiers
Overcoming Barriers
For your top 3 barriers, brainstorm ways to overcome these barriers.

Strategy and Outreach Plan

The purpose of a Strategy and Outreach Plan is to support the **[intended audience]** and provide organized strategy development and communications for underserved populations over the next **[timeline]**.

Strategy Scope & Objectives

(What is your objective in reaching underserved communities? What activities will need to be implemented to achieve your goals? Clearly identify what you are trying to achieve with this strategy.)

Intended Audience

(Reference Step 2 of the underserved populations toolkit for support identifying underserved populations in your community. Be as specific as possible – residential area, ethnicity, background, etc.)

Barriers

(What might get in the way of achieving your objectives? Be as specific as possible – language, childcare availability, convenience, etc.)

Key Messages

(What information is essential to share with your intended audience? These messages should help achieve your objectives and reduce the impact of identified barriers.)

Resources/Communication Channels

(What communication channels does your intended audience use? What communication channels do you have access to?)

Timeline

(What needs to happen by when? Are there any funding cycles or government cycles to be aware of? Are there specific milestones that need to be achieved?)

Measurement & Targets

(How will you measure progress? If direct measurements are difficult or overly time consuming, are there indirect metrics [flyers mailed or handed out, number of people at an event, etc.] that may be easier to track?)

(What targets would make this strategy successful?)

(How will you collect this data? Who is responsible for tracking it?)

Example Tracking Table

Activity Description	Timing	Measured Impact (e.g., # of flyers, contacts, sign-ups)	Qualitative Impact
Table at event XYZ	Fall 2019	100 flyers, 5 sign-ups	People were receptive & curious about available

Activity Overview Worksheet

(Use the table below to organize your outreach activities. Each activity should be tied directly to a communication channel, objective, and audience identified on the previous page. Note the corresponding numbers in the table. Add additional detail (such as milestone deadlines or support roles) as needed using the outline provided below.

Deadline	Activity	Communication Channel	Objective	Audience	Responsible Party	Status

Additional Activity Details

Activity

(Example: Partner with Meals on Wheels to provide program information)

Timeline

(Example: September - develop flyer & send to City, October - distribute flyers with Meals

on Wheels)

Responsible Parties

(Example: John Doe – develop flyer, City – distribute flyer)

Expected Outcome/Target

(Example: 100 meal deliveries with flyers)

Resources Needed

(Example: Flyer content & design, printer)

Potential Challenges / Solutions

(Example: Senior citizens receiving flyers may be unable to read them - have talking points

for volunteer delivering meal kit)

Other Notes

(Example: City will coordinate with Meals on Wheels)

MINNESOTA SPECIFIC RESOURCES

Xcel Energy Program Resources

- Low-income Home Energy Squad®: Home Energy Squad is an in-home visit from local efficiency experts, who will perform a home energy assessment and discuss the small home improvements that can help you save money. Then, the Home Energy Squad team gets to work installing your preferred energy saving measures. Free visits are available to households who qualify.
- Low Income-Qualified Home Energy Savings Program: If your income qualifies, you
 can use these free services to save money and energy. To deliver this program, Xcel
 Energy has teamed up with program service providers Energy CENTS Coalition
 and Sustainable Resources Center, Inc. And based upon the individual needs, the
 program provides several energy-saving improvements like replacing inefficient
 appliances, installing attic insulation or a furnace replacement. Each is designed to
 reduce energy usage and ultimately lower energy bills.
- PowerON and Gas Affordability Program: The PowerON and Gas Affordability Program is offered by Xcel Energy and is administered by the Energy CENTS Coalition. The programs offer low-income Xcel Energy customers in Minnesota the opportunity to receive a discount on a portion of their monthly electric bill (through the PowerON program) and monthly gas bill (through the Gas Affordability program). The program is available to residential customers who are currently receiving assistance from the federal Low Income Home Energy Assistance Program (LIHEAP).
- Pay Arrangement: If you're having trouble paying your total balance due every month, you may be eligible to sign up for a Pay Arrangement through My Account on the Xcel Energy website. A Pay Arrangement spreads your balance over one to three monthly payments.
- Medical Affordability Program: The Medical Affordability Program is a special energy assistance program available from Xcel Energy and its partner, the Energy CENTS Coalition, a community-based organization that promotes more affordable utility service for low- and fixed-income Minnesotans with special medical needs.
- Income-Qualified Multi-family Energy Savings Program: Xcel Energy has teamed up
 with Franklin Energy Services to help make your building more energy-efficient. If
 your building qualifies, we'll install in-unit energy-saving LEDs and replace qualified
 inefficient appliances, to help your tenants save energy and live more comfortably.
 Visit Xcel Energy's website or call Franklin Energy Services at 612-284-3663 to learn
 more.

Minnesota Statewide Resources

- Low Income Home Energy Assistance Program (LIHEAP): Administered by the Minnesota Commerce Department and funded through the US Department of Health and Human Services, LIHEAP helps keep families safe and healthy through initiatives that assist families with energy costs. They provide federally funded assistance in managing costs associated with: Home energy bills, energy crises, and weatherization and energy-related minor home repairs. LIHEAP can help you stay warm in the winter and cool in the summer through programs that reduce the risk of health and safety problems that arise from unsafe heating and cooling practices.
- Weatherization (WAP): The Weatherization Assistance Program (WAP) enables low-income families to reduce their energy bills by making their homes more energy efficient. The U.S. Department of Energy (DOE) provides funding to states, who, in turn, fund a network of local community action agencies, nonprofit organizations, and local governments that provide these weatherization services. If you qualify for LIHEAP or receive Supplemental Security Income or Aid to Families with Dependent Children, you are automatically eligible to receive weatherization services. In other cases, states give preference to people over 60 years of age; families with one or more members with a disability; and families with children (in most states).
- HeatShare Program (Salvation Army): HeatShare is a Salvation Army Program that
 provides emergency utility assistance for people with no place left to turn. The
 program is funded in part by Salvation Army donors and by local utility companies
 and their customers. HeatShare is offered at most Salvation Army operation centers
 in Minnesota. In communities where HeatShare funding isn't available, other
 Salvation Army partners may have resources.
- Minnesota Reach Out for Warmth: If your income is a little high and you can't qualify
 for the federal government Energy Assistance Program, then the Reach Out for
 Warmth fund may be able to assist. It is available in counties across Minnesota and
 local agencies process applications and administer the program. Call 1-800-657-3710
 to get more information or to apply.
- Energy Related Repair Program (ERR): ERR provides emergency repair or replacement of heating systems for Energy Assistance clients. To be eligible for assistance with a heating system you must: be approved for energy assistance; own your home; and have a non-functioning heating system. Local Community Action Agencies throughout Minnesota administer this program in their service areas. Use Minnesota Department of Human Services website to find the Community Action Agency that serves your community.
- Supplemental Aid Housing Costs Assistance: Minnesota Supplemental Aid (MSA)
 Housing Assistance helps people with disabilities who pay more than 40 percent
 of their income toward housing costs so that they have a choice about where they
 live. Visit the Minnesota Department of Human Services website to learn more and
 apply.

COLORADO SPECIFIC RESOURCES

Xcel Energy Program Resources

- Xcel Energy Colorado Medical Exemption Program (CMEP): CMEP provides lower electric rates to Xcel Energy electric customers who use life-support equipment in their households or have medical conditions that require high power use to keep cool during the summer. Contact Sabrina Padilla at 303-993-5056 or visit bit.ly/2U6VrFO
- Xcel Energy Pay Arrangements: If you're having trouble paying your total balance due every month, you may be eligible to sign up for a Pay Arrangement. To make it easier on your budget, a Pay Arrangement spreads your balance over one to three monthly payments. Call 800-895-4999 or sign up online through My Account at myaccount. XcelEnergy.com
- Xcel Energy HomeSmart: Avoid unexpected and costly appliance repairs with
 Xcel Energy's affordable appliance repair plan. HomeSmart from Xcel Energy is a
 maintenance, repair, and replacement service designed to keep your home's appliances
 running safely and efficiently. You can customize your service by choosing the appliances
 that fit your needs and budget. Call 866-837-9762 to learn more or visit XcelEnergy.com/
 HomeSmart. (Note: This program is best for seniors and may not be the right fit for lowincome or rental households. Reach out to Xcel Energy if you have further questions)
- Electric and Gas Affordability Programs: For customers who received assistance through LEAP, these programs are non-emergency energy assistance to help reduce energy bills.
- Average Monthly Payment: Enjoy predictable bills with Averaged Monthly Payment (AMP). Your payments will be spread evenly over 12 months and you only pay for the energy you use.
- Non-Profit and Affordable Housing Programs: Xcel Energy partners with Energy
 Outreach Colorado (EOC) to offer energy-efficiency grants to nonprofit and multifamily
 affordable housing facilities serving income-qualified individuals and families. These
 programs help participating organizations increase comfort in the facility, while reducing
 utility costs for tenants or building owners.

Colorado Statewide Resources

- Energy Outreach Colorado provides energy assistance services across the state, including bill payment assistance, heating system repair/replacement, energy efficiency upgrades, and administering Colorado's LEAP and WAP programs. Some programs they offer include:
 - Low-income Energy Assistance Program (LEAP): This program, administered by the Colorado Department of Human Services, helps keep families, seniors, and individuals warm during winter months by paying a portion of their home heating costs.
 - Weatherization (WAP): The Weatherization Assistance Program (WAP) enables low-income families to reduce their energy bills by making their homes more energy efficient. The U.S. Department of Energy (DOE) provides funding to states, who, in turn, fund a network of local community action agencies, nonprofit organizations, and local governments that provide these weatherization services. If you receive Supplemental Security Income or Aid to Families with Dependent Children, you are automatically eligible to receive weatherization services. In other cases, states give preference to people over 60 years of age; families with one or more members with a disability; and families with children (in most states).
 - Colorado's Affordable Residential Energy Program (CARE): In partnership with utilities across the state, EOC implements the CARE program in participating counties (see map). Similar to WAP, energy efficient upgrades and education are provided to customers to reduce their energy bills. CARE addresses barriers to participating in the federally funded WAP program by accepting a broader range of income levels (up to 80% of Area Median Income, varies by county) and less stringent documentation requirements.



COLLATERAL EXAMPLES

The following pages provided examples of community co-branded collateral developed by Xcel Energy Partners in Energy. Contact PartnersinEnergy@xcelenergy.com to request development of materials customized for your community's unique needs.





STRUGGLING WITH YOUR ENERGY BILLS?

There are resources to help!

Low Income Home Energy Assistance Program

The Energy Assistance Program (EAP) helps pay for home heating costs and furnace repairs for income-qualified households. Services may include payment of energy bills, help with utility disconnection, and education on efficient and safe use of energy.

Visit mn.gov/commerce/eap.jsp to learn more.

Weatherization Assistance Program (WAP)

TThe Weatherization Assistance Program provides free home energy upgrades to income-eligible homeowners and renters to help save energy and make sure your home is a healthy and safe place to live.

Call 1-800-657-3710 or email energy.info@state.mn.us to find your local service provider.

HeatShare Program

HeatShare is a Salvation Army Program that provides emergency utility assistance for people with no place left to turn.

Call 1-800-842-7279 to get assistance in your area. Learn more at http://bit.ly/2p4qJBA.

Not sure where to start? Talk to your Community Action Agency.

Community Action Agencies provide local, state, federal and private resources to help individuals and families in their service area. They will help you navigate the available programs and understand the application process.

Visit MinnCAP.org to find the agency serving your county.

[Community Logo]





NEED AN EXPERT TO HELP WITH ENERGY ACTIVITIES AT YOUR HOME?

Here are some Xcel Energy resources that might come in handy.

Low-income Home Energy Squad®

Home Energy Squad is an in-home visit from local efficiency experts who perform a home energy audit and discuss the small home improvements that can help you save money. Then, the Home Energy Squad team gets to work installing your preferred energy saving measures. Free visits are available for income-qualified households.

To schedule a visit call 866-222-4595 or go online at HomeEnergySquad.net.

Low Income-Qualified Home Energy Savings Program

If your income qualifies, you can use these free services to save money and energy. The program is customized for your home, and with this program, you could receive: savings on your energy bills, free advice from an energy expert, the advantage of free energy-saving improvements, and replacement of older appliances with newer models.

Xcel Energy has teamed up with program service providers Energy CENTS Coalition and Sustainable Resources Center, Inc. to help.

Metro East

Energy CENTS Coalition 651-774-9010

Metro West and Out State

Sustainable Resources Center, Inc. 612-870-4255

Toll-free: 844-870-4255

HomeSmart

Avoid unexpected and costly appliance repairs with our affordable appliance repair plan. HomeSmart from Xcel Energy is a maintenance, repair, and replacement service designed to keep your home's appliances running safely and efficiently.

Call 866-837-9762 or visit HomeSmartMinnesota.com.





We want to give you things that will save you money. And we want to give you money. Honest.

See if you qualify for a FREE Home Energy Squad® visit. Sign up today and get a \$20 Visa® gift card when your visit is complete.

Does your home have drafty doors, an old thermostat, or inefficient incandescent light bulbs? The Home Energy Squad can quickly, efficiently, and affordably fix these things and more in one visit.

If you live in a one-to-four-unit building and your household size meets the annual income limits listed below, you qualify for a free visit.

Household Size	Income Limit
1	\$25,983
2	\$33,978
3	\$41,973
4	\$49,968
5	\$57,963
6	\$65,958
7	\$67,457
8	\$68,956

SCHEDULE YOUR VISIT TODAY! Call 651-328-6220

Home Energy Squad is provided by CenterPoint Energy and Xcel Energy.

[Community Logo]



PUT HOME ENERGY SQUAD® TO WORK FOR YOU. GET \$200 WORTH OF ENERGY-SAVING HELP, FOR JUST \$50.



Home Energy Squad will deliver and install \$200 worth of services and equipment in your home in just two hours. The cost includes:

- Replacing showerheads with energy-efficient models
- Weather-stripping a drafty, exterior door
- Installing a programmable thermostat
- Switching out traditional, incandescent bulbs for LEDs
- Adding aerators to your kitchen and bathroom faucets

Top off your visit with extra services. Have several drafty doors? Need another thermostat? You can choose to purchase extra options.

Visit xcelenergy.com/HomeEnergySquad or call 303.446.7910 to schedule your visit.





^{*}The \$50 trip charge includes installation, labor and materials for the basic services outlined above. Additional quantities of weather stripping and thermostats can be purchased a la carte.

Available only to Colorado Xcel Energy combination electric and natural gas residential customers, or electric only customers. Depending on the availability of our Squad, please allow up to 10 days to schedule your visit. For eliaibility and service details, visit xcelenergy.com/HomeEnergySquad.

PONGA A NUESTRO EQUIPO DE HOME ENERGY SQUAD® A TRABAJAR POR USTED. POR SOLO \$50 RECIBA UNA AYUDA CON VALOR DE \$200 PARA AHORRAR ENERGÍA.*



Nuestro equipo de Home Energy Squad le proporcionará e instalará en su casa servicios y equipo con valor de \$200. La instalación tomará un máximo de 2 horas y podría incluir:

- Reemplazar los cabezales de las duchas con modelos que ahorren energía
- Burlete en una puerta exterior por donde se filtra la corriente
- Instalación de un termostato programable
- Cambiar los focos incandescentes tradicionales por focos LED
- Colocación de aireadores en los grifos de la cocina y el baño
- Optimice la visita con servicios adicionales.

¿Tiene varias puertas por las que se filtra la corriente? ¿Necesita otro termostato? Puede comprar opciones adicionales.



¡Visite xcelenergy.com/HomeEnergySquad o llame a Gustavo al número 303.446.7895 para programar su visita!



PARTNERS IN ENERG

An Xcel Energy Community Collaboration



^{*}Con el cargo de \$50 los clientes reciben el servicio de un técnico de energía que puede instalar tantos productos específicos de cortesía como sea posible durante la visita de 2 horas. Hay cantidades adicionales de algunos artículos a disposición del cliente para comprar a un costo extra. Disponible solo para clientes residenciales de Xcel Energy en Colorado que utilicen servicio combinado de electricidad y gas natural, o clientes que utilicen solo electricidad. Dependiendo de la disponibilidad de nuestros equipos de Home Energy Squad, considere 10 días para programar su visita.



SAVE MONEY WITH FREE WEATHERIZATION ASSISTANCE

In partnership with local agencies and the U.S. Department of Energy, the Colorado Energy Office (CEO) offers a free Weatherization Assistance Program (WAP) to Colorado's lowincome residents.

WAP services include a variety of measures that improve the energy efficiency of a home. These services reduce wasted energy and lower costs while improving the overall comfort and safety of a home year-round.

- ✓ LED light bulb retrofits
- ✓ Air sealing
- ✓ Insulation in attic, floors and walls
- ✓ Furnace safety testing
- ✓ Furnace repair or replacement
- ✓ Refrigerator replacement
- ✓ Storm windows and doors
- ✓ Energy conservation information
- ✓ Solar photovoltaics

Visit the Local Agencies page to contact yoru local weatherization service provider (based on your county).

www.Colorado.gov/pacific/energyoffice/local-agencies



Find out if you qualify for weatherization assistance services:

If you currently receive financial assistance from any of the following programs, you automatically qualify for weatherization services:

- ✓ Temporary Assistance for Needy Families (TANF)
- ✓ Aid to the Needy and Disabled (AND)
- ✓ Old Age Pension (OAP)
- ✓ Supplemental Security Income (SSI)
- ✓ Low Income Energy Assistance Program (LEAP)
- ✓ Supplemental Nutrition Assistance Program (SNAP)
- ✓ Social Security Disability Insurance (SSDI)

Households can also be eligible if they meet required income guidelines. You can use the chart below to see if you qualify.

Persons in Household	Income Limit
1	\$24,980
2	\$33,820
3	\$42,660
4	\$51,500
5	\$60,340
6	\$69,180
7	\$78,020
8	\$86,860

www.colorado.gov/pacific/energyoffice/weatherization-assistance







SOCIAL MEDIA CONTENT

Xcel Energy Pay Arrangements Video

Home Energy Squad Video

HomeSmart Sample Post



Avoid unexpected and costly appliance repairs with our affordable appliance repair plan. HomeSmart from Xcel Energy is a maintenance, repair, and replacement service designed to keep your home's appliances running safely and efficiently. You can customize your service by choosing the appliances that fit your needs and budget.

Call 866-837-9762 to learn more or visit XcelEnergy.com/HomeSmart



