



ELEVATE

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322 S. Green St.
Suite 300
Chicago, IL 60607

May 19, 2023

Ms. Maddie Koewler
National Association of State Energy Offices (NASEO)
Via email: mkoewler@naseo.org

Dear Ms. Koewler,

Elevate Energy (Elevate) appreciates the opportunity to provide a response to the National Association of State Energy Officials (NASEO) request for information for the implementation of the Home Energy Performance-Based Whole-House Rebate Program (HOMES) and the High-Efficiency Electric Home Rebate Program (HEEHR) programs. Elevate is submitting a response for Category 2 Program Elements and Category 3 Indication of Vendor Interest.

Elevate Energy authorizes NASEO to publish and distribute this response to the NASEO RFI on its website and through other means to the states and general public. We have included no confidential or proprietary information in our response.

If you have any questions regarding the information presented in this response, please contact Elena Savona at 773.439.1136 or Elena.Savona@ElevateNP.org.

Thank you,

Anne Evens
Chief Executive Officer
Elevate Energy



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Category 2: Program Elements

Company Characteristics

16. *Name, contact information, company or organization that you represent.*

Name: Elena Savona, Director of Federal Partnerships

Company: Elevate Energy

Address: 322 S. Green Street, Suite #300, Chicago, IL 60607

Contact information: 773.439.1136, Elena.Savona@ElevateNP.org

17. *An overview of your approach to equity, diversity, inclusion, and accessibility (DEIA).*

[Elevate Energy](#) (Elevate) is a 501(c)(3) nonprofit organization that centers equity in climate action. Diversity, equity, inclusion, and accessibility are at the core of Elevate's mission and vision.

Organizational Commitment: Elevate is committed to diversity in all its forms. As a nonprofit organization, Elevate is not eligible to be certified as a Minority-, Woman-, Veteran-, Disadvantaged-Business Enterprise (MWVDBE). However, our commitment to diversity is demonstrated at every level of our organization, from our staff to the executive team and Elevate's board of directors. We are a majority woman-led organization. In 2020 Elevate established a staff-led Diversity, Racial Equity, and Inclusion (DREI) committee, whose work is reflected on our [website](#). In our 2021-2023 strategic plan, Elevate committed to focusing on integrated, equity-driven program delivery and innovation. The DREI committee is contributing to actualizing many facets of this commitment. The committee is one of several resources established to help us identify and remove barriers to equity in hiring and board composition, as well as our programs and services. Elevate is a leader in conscious communications and continues to offer internal and external guidance on language that centers humanity over condition and contributions over shortcomings.

Authentic Partnerships: Elevate is committed to ensuring the projects we lead, or are involved in, are as diverse as the communities we support. Our diversity goals align with our goal to ensure underserved communities have access to the services and jobs created from the clean energy economy. Our approach is mindful of the fact that many of the underserved communities and businesses we support have not always had access to these opportunities or may have had challenges navigating partnerships constrained by federal funding requirements. An important part of our approach is not only to authentically engage communities, but also to provide resources, access, support, training, and opportunities to partner with a long-term goal of ensuring access to the clean energy economy.

Commitment to Contractor and Workforce Diversity: We believe that equitable development of the clean energy economy means investing in people & businesses, not just in technologies. Elevate works across the country providing both workforce development trainings and contractor development programs to historically marginalized communities, including Black, Indigenous, and other communities of color, immigrants, women, as well as communities that have lower incomes. Due to severe historical disinvestment, there is an urgent need to level the playing field and support these communities in accessing the wealth-building opportunities of the clean energy economy and enhancing the industry by bringing their skills, passions, and experience.



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18. As applicable, a short description and a link to programming that your company is contracted or has been contracted to implement for planning, administering, and/or field delivery of federal or state programs. Note which, if any, provides low- and moderate-income and affordable home energy upgrades, especially with and in disadvantaged communities.

Elevate works nationally and is headquartered in Chicago. Elevate designs and implements programs to ensure that everyone has clean and affordable heat, power, and water in their homes and communities — no matter who they are or where they live. We help people reduce costs and improve their quality of life, from homeowners, renters, and property owners, to nonprofit organizations, utilities, and municipalities. Our team builds strong connections in the places we work and delivers high-quality programs and services that contribute to healthy, thriving communities. Elevate implements the following programs with federal, state, and local funding support.

Building Retrofits and Electrification: Elevate is currently working with owners of several hundred affordable residential properties in the Midwest and Pacific Northwest to decarbonize their buildings through a combination of deep energy efficiency retrofitting, replacing appliances and equipment such as stoves, water heaters, and furnaces with electric equipment, and installing solar PV systems. We work with both subsidized affordable housing and naturally occurring, unsubsidized affordable housing. Elevate provides financial support and a full support service delivery model (one-stop shop). Our program takes an equitable approach to building electrification by providing these upgrades in buildings where energy burden can be reduced and in communities that have historically been under-resourced. Elevate braids funds from several sources including philanthropic, utility, government funding and financing.

Illinois Solar for All: Elevate serves as the Program Administrator for Illinois Solar for All on behalf of the Illinois Power Agency, an independent state government agency. Illinois Solar for All is a state program that brings the benefits of solar energy to income-eligible households, non-profit organizations, and public facilities. Illinois Solar for All focuses on the people and communities who can benefit the most from the solar energy economy. To ensure that more people can benefit from solar energy, Illinois Solar for All helps create jobs for members of historically marginalized communities.

Healthy Homes for Healthy Families (website under development): Through funding from the American Rescue Plan, Elevate is implementing the Cook County Healthy Homes for Healthy Families program. This program provides a variety of home upgrades at no cost to owners or renters of residential buildings in suburban Cook County at homes where children under the age of six live and play. The goal of the program is to make comprehensive upgrades that make homes energy efficient, healthy, and safe for children. Eligible participants are renters and building owners that have participated in existing Cook County Department of Public Health's childhood lead prevention programs, utilizing the requirement of 120% Average Median Income or less, at 100% coverage.

Workforce and Contractor Development: Elevate's workforce and contractor development programs ensure everyone can take advantage of the rapidly increasing workforce and small business development opportunities in the clean energy economy. We develop networks of support for people who have traditionally been underserved or left out of economic opportunities. To do this, we



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collaborate with local community partners to provide access to training, resources, and jobs to ensure an equitable, inclusive, and high-caliber clean energy economy.

Climate Planning: Elevate works closely with municipalities and communities to develop their sustainability and energy goals and then integrate actions into the communities' everyday roles, responsibilities, and strategic priorities. Our team of planning professionals and energy analysts takes a comprehensive approach and offers a menu of available services to examine a community's energy, transportation, waste, water, and land use. Since 2004, Elevate has partnered with over 200 municipalities on their sustainability and climate plans.

Building Efficiency Hubs: As more regions commit to climate goals, significant carbon reduction in buildings is essential. We make high performance buildings easier to achieve by providing support services for building owners who are interested in energy efficiency, water efficiency, and solar. We work with partners to provide these services nationally. Through this program, we work directly with building owners and developers as well as in public-private partnerships with municipalities.

Community Resources: Elevate's Community Resources team is committed to partnering with residents and communities to make informed energy choices through grassroots education. To accomplish this, Elevate hosts educational house parties and workshops, speaks at community meetings, and collaborates with community groups to meet their needs. Elevate has a robust online presence to reach community members virtually as well as in person.

Program Elements

19. Describe the program element that is important for State Energy Office consideration. Be as detailed as possible.

Income Eligibility and Verification

It is important for the State Energy Offices (SEOs) to include multiple and flexible methods for income eligibility verification and to especially be sure to include options that allow multifamily buildings to qualify without having to verify income of individual tenants. Options to consider include automatic qualification at the building level based on factors such as geographic location (being located in areas identified as income eligible or identified in other maps such as CJEST or DOE's DACs), categorical eligibility based on participation in federal/state/local housing subsidy programs or utility income-eligible programs, proof of affordability deeds or covenants, or others. It is important that there are multiple ways to qualify, so that, for example, a building that does not fall in a geographically eligible area can still follow another path to qualify. There could also be room for self-attestation around income as part of the eligibility process, pending further DOE guidance on this subject. Additionally, SEOs should consider making specific carve-outs in their plan for lower-income thresholds, such as setting aside a portion of funding for <50% AMI. Carve-outs for affordable multi-family housing would also be beneficial.

Effective Partnerships and Justice40

SEOs should be sure to partner with state and local organizations with a strong understanding of affordable housing and established relationships with income-eligible communities and affordable



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housing owners, particularly multi-family housing which has significant savings opportunity but may face more barriers to participation without specific attention. A key partner will be the state Housing Finance Agency which has this experience as well as direct access to buildings that will have already passed income qualification. Additionally, HUD, USDA Rural Development, Public Housing Authorities, and Tribal housing agencies will be helpful partners in this work. Municipalities are a key partner in program development for reaching the affordable, unsubsidized housing stock. To most effectively achieve the objectives of the IRA home energy rebates and Justice40 Initiative commitments, SEOs should also engage local community-based organizations (CBOs) to support with outreach. CBOs not only have processes and capacity on the ground already but can also help build trust in communities that may be more skeptical of government programs. SEOs should include plans to meet or exceed J40 goals and flow down metrics to administrators to ensure the goals are met, with publicly available reporting of standardized metrics. State plans must also include discussion of channels to ensure DACs and families with low incomes are aware of and can access rebates.

To build awareness of the rebates, SEOs should require program administrators to focus outreach on subsidized and naturally occurring affordable housing and disadvantaged communities and partner with CBOs to reach them more effectively. These will include existing Weatherization Assistance Program (WAP) providers and CBOs involved with utility efficiency programs, as well as one-stop-shop providers such as members of the Relay Network that are serving disadvantaged communities (DACs) and families with low incomes.

Technical Assistance

To ensure that DACs and families with low incomes can access programs, SEOs should ensure that administrators provide technical assistance (TA) that helps residents and building owners understand the needs of their buildings and find and oversee qualified contractors to do the work. TA should also help building owners pair rebates with as many existing programs and financial resources as possible, including utility programs, state housing finance agency programs, and other IRA-created programs such as block grants, tax credits, and the greenhouse gas reduction fund. Administrators should also engage state housing finance agencies to assist in reaching subsidized affordable housing and ensure that income verification processes are not burdensome for residents.

Future-Proofing

SEOs should specify that HOMES money cannot be used for the installation of new fossil-fuel powered appliances. This element is important to ensure that the money is not being used to lock homes, especially income-eligible homes, into technology that will be out of alignment with standards well before the end of its useful lifetime, as well as negatively contributing to local air pollution. This is in line with best practice climate science recommendations, including the latest IPCC report.



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Category 3: Indication of Vendor Interest

Company Characteristics

22. *Name, contact information, company or organization that you represent.*

Name: Elena Savona, Director of Federal Partnerships

Company: Elevate

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Contact information: 773.439.1136,

23. *An overview of your approach to equity, diversity, inclusion, and accessibility (DEIA).*

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24. *As applicable, a short description and a link to programming that your company is contracted or has been contracted to implement for planning, administering, and/or field delivery of federal or state programs. Note which, if any, provides low- and moderate-income and affordable home energy upgrades, especially with and in disadvantaged communities.*

Elevate works nationally and is headquartered in Chicago. Elevate designs and implements programs to ensure that everyone has clean and affordable heat, power, and water in their homes and communities — no matter who they are or where they live. We help people reduce costs and improve their quality of life, from homeowners, renters, and property owners, to nonprofit organizations, utilities, and municipalities. Our team builds strong connections in the places we work and delivers high-quality programs and services that contribute to healthy, thriving communities. Elevate implements the following programs with federal, state, and local support focused on communities with lower incomes.

- [Building Retrofits and Electrification](#) – Funded by several sources including federal funds, this program provides comprehensive retrofits, from weatherization to solar, with a one-stop shop delivery model.
- [Illinois Solar for All](#) – State program providing solar to income-eligible residents and communities.
- **Healthy Homes for Healthy Families** – ARPA-funded, this new program provides comprehensive upgrades that make homes energy efficient, healthy, and safe for children.
- [Workforce and Contractor Development](#) – These programs provide access to training, resources, and jobs to historically marginalized contractors and individuals.
- [Climate Planning](#) – Supports states and municipalities with sustainability and climate planning.



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- [Building Efficiency Hubs](#) – In partnership with mission-aligned organizations, Elevate supports services for building owners who are interested in energy efficiency, water efficiency, and solar.
- [Community Resources](#) – Elevate provides education and resources to residents and communities to make informed energy choices.

Company Summary

25. Summarize the services your company or organization could provide to a State Energy Office in the execution of these programs.

Elevate’s strength is in our one-stop shop delivery method and in the intentional partnerships we build at every level, with residents, community organizations, contractors, and state and local entities. We have proven our approach in Illinois and have expanded nationally. Elevate can assist SEOs in the implementation of home energy rebates through the following services:

Consumer Outreach and Education: Elevate has run consumer outreach and education programs on the smart grid, energy, and equity through our Community Resources team as a component of programs we administer through a hands-on, engaging approach both in person and remotely. A robust consumer education will be an essential element to ensure that households with low incomes and affordable housing learn about the programs first.

Stakeholder and community engagement: Elevate can help facilitate and amplify the voices that need to be heard as these programs are designed, implemented, and evaluated. It will also be important to provide meaningful opportunities to share communities’ stories and lived experiences with program administrators and other program vendors.

Technical assistance: Elevate has experience providing technical assistance to multi-family and affordable housing owners, including unsubsidized owners, and in working with environmental justice communities, households with low incomes, and DACs. SEOs should leverage existing energy efficiency programs. Elevate welcomes coordination with existing programs we already offer, including utility- or other state-funded energy programs, to make sure that there is alignment and to reduce the risk of market confusion. Elevate can assist with all phases of a comprehensive retrofit, including project planning and funding, incentive structuring, project approval, contractor network development, contractor selection, installation and construction, quality control/oversight, and measurement and verification.

Training and Education: Elevate can assist SEOs by providing training and education to building professionals, with particular focus on contractors and real estate professionals. Elevate has established programs nationwide for both contractors and workforce members as well as for real estate professionals. Training and support for diverse contractors and the workforce will help build a knowledgeable and diverse group of workers who can deliver high-quality energy efficiency and electrification installations. Training for real estate professionals will ensure that the value of a higher performing home is captured at the point of sale.