



Energy Efficiency
PROGRAM

Program Ally Morning Brief: Health and Safety Process

July 22, 2025

Agenda

- **Health and Safety (H&S) Process Overviews**
 - › History of Health and Safety
 - › Two “buckets” for Health and Safety
 - › Staff
 - › Timelines
 - › Health and Safety showstopper found during an assessment
 - › Health and Safety showstoppers found during a project lead
- **Other HEIQ Announcements**
- **Q&A**

Health and Safety Process Basics

- **History of Health and Safety**

- › Goal of Health and Safety funding
- › How we got to where we are today

- **Two types of Health and Safety**

- › **Remediation showstoppers** prevent project work from moving forward –
NOTE: CAN occur after a project is sent as a lead
 - Knob and tube wiring
 - Suspect Asbestos Containing Material (SACM)
 - Bulk moisture
 - Mold
- › **Retrofit Health and Safety** can proceed at the same time as the project work
 - Bath vent fans
 - Vapor barrier
 - Water heater

Health and Safety Process Basics

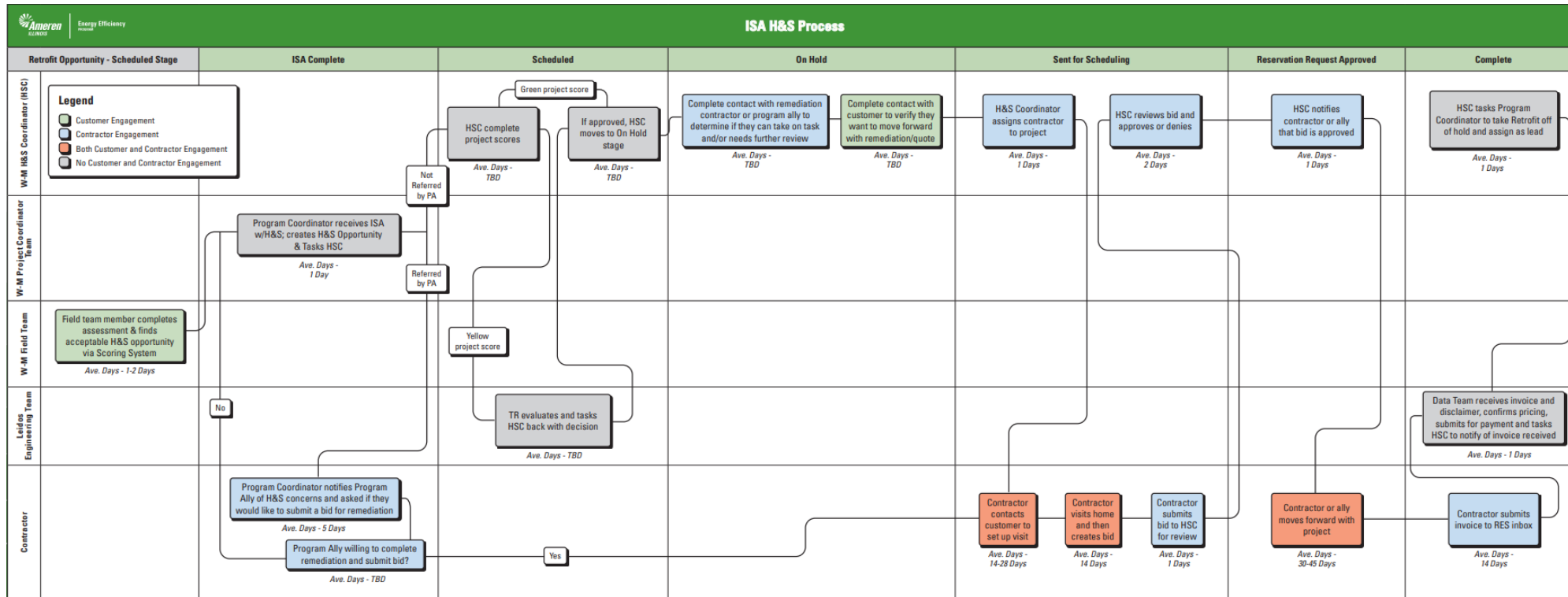
- **Staff involved with each type**

- › Showstoppers – Field Team, Health and Safety Coordinator (HSC), Technical Review (TR)
- › Workscope – Field Energy Specialist (FES), Technical Reviewer (TR)

- **Timelines**

- › Average stage durations are being determined
- › This process will officially begin on Monday, July 28

Health and Safety Showstoppers found during an Assessment (Remediation Health and Safety)



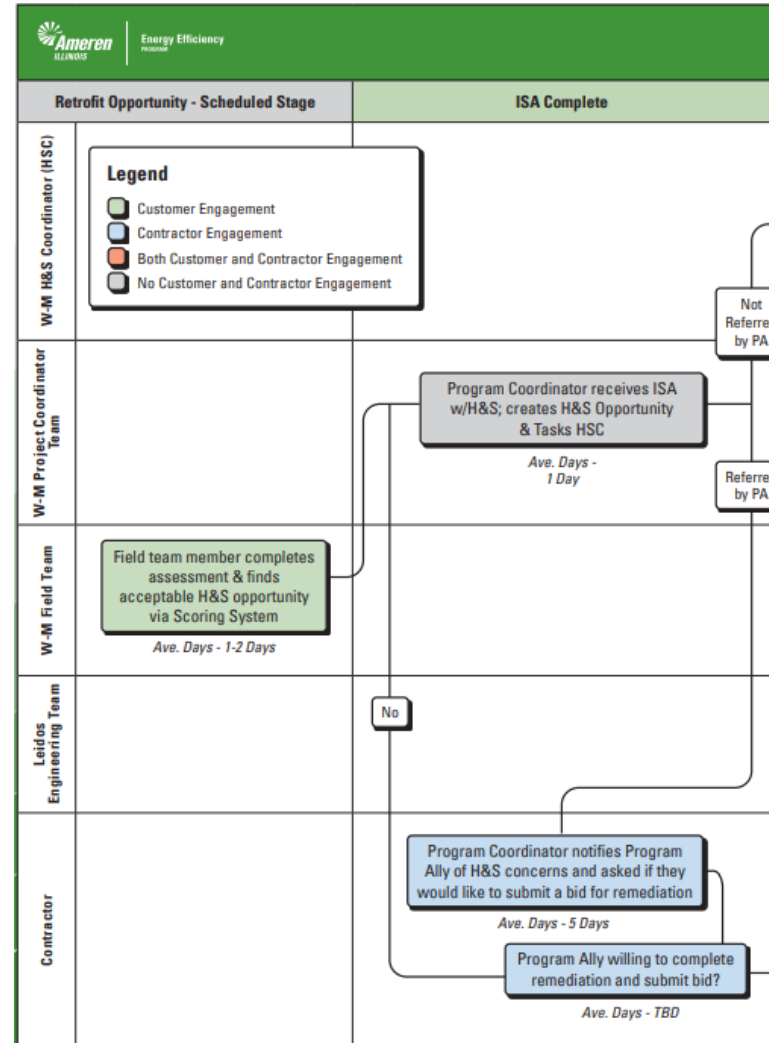
Remediation Process

Retrofit Opportunity - Scheduled Stage

- Step 1: Field team member completes assessment and finds the acceptable Health and Safety opportunity.

Health and Safety Opportunity – ISA Complete Stage

- Step 2: Program Coordinator places retrofit opportunity on hold and creates Health and Safety opportunity and tasks the Health and Safety Coordinator (HSC).
 - › If referred-by Program Ally customer, Program Coordinator notifies Program Ally of Health and Safety concerns and asks if they would like to submit a bid for remediation. If so, health and safety opportunity moves **to Sent for Scheduling**, skip to #6.



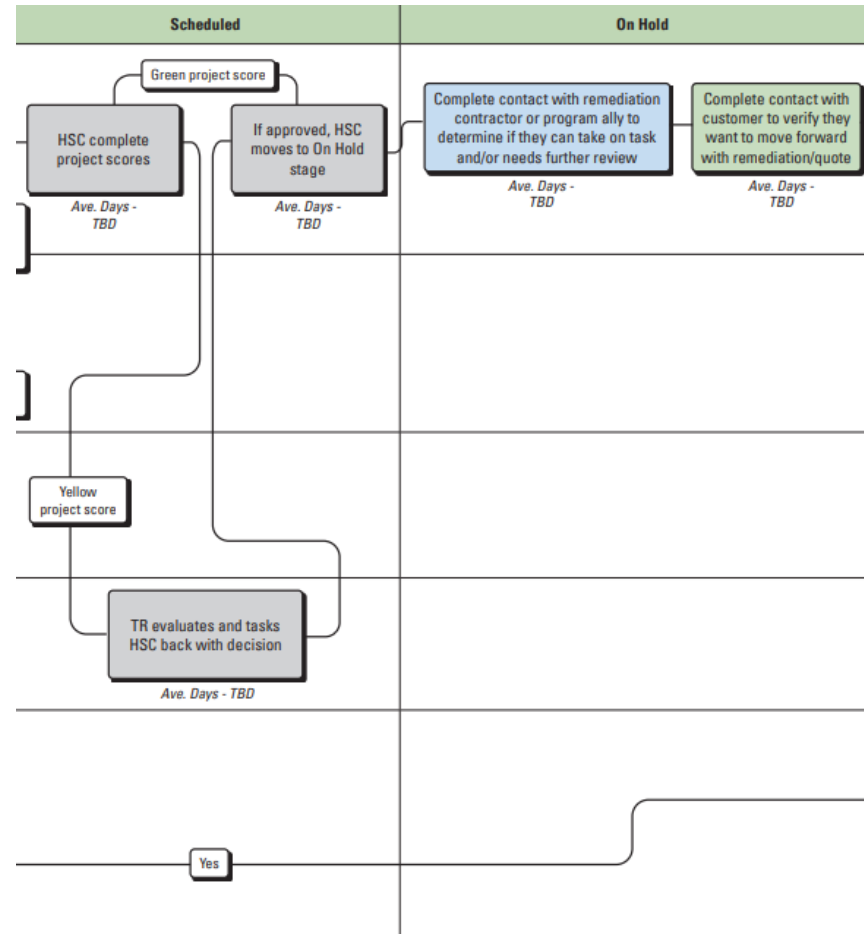
Remediation Process

Health and Safety Opportunity – Scheduled Stage

- Health and Safety Coordinator and Technical Review evaluate project(s) to determine if it falls within Program guidelines.

Health and Safety Opportunity – On Hold Stage

- If approved, the Health and Safety Coordinator contacts remediation contractor to determine availability.
- The Health and Safety Coordinator contacts homeowner to inform them funding may be available to remediate Health and Safety concerns and verify they would like to move forward.



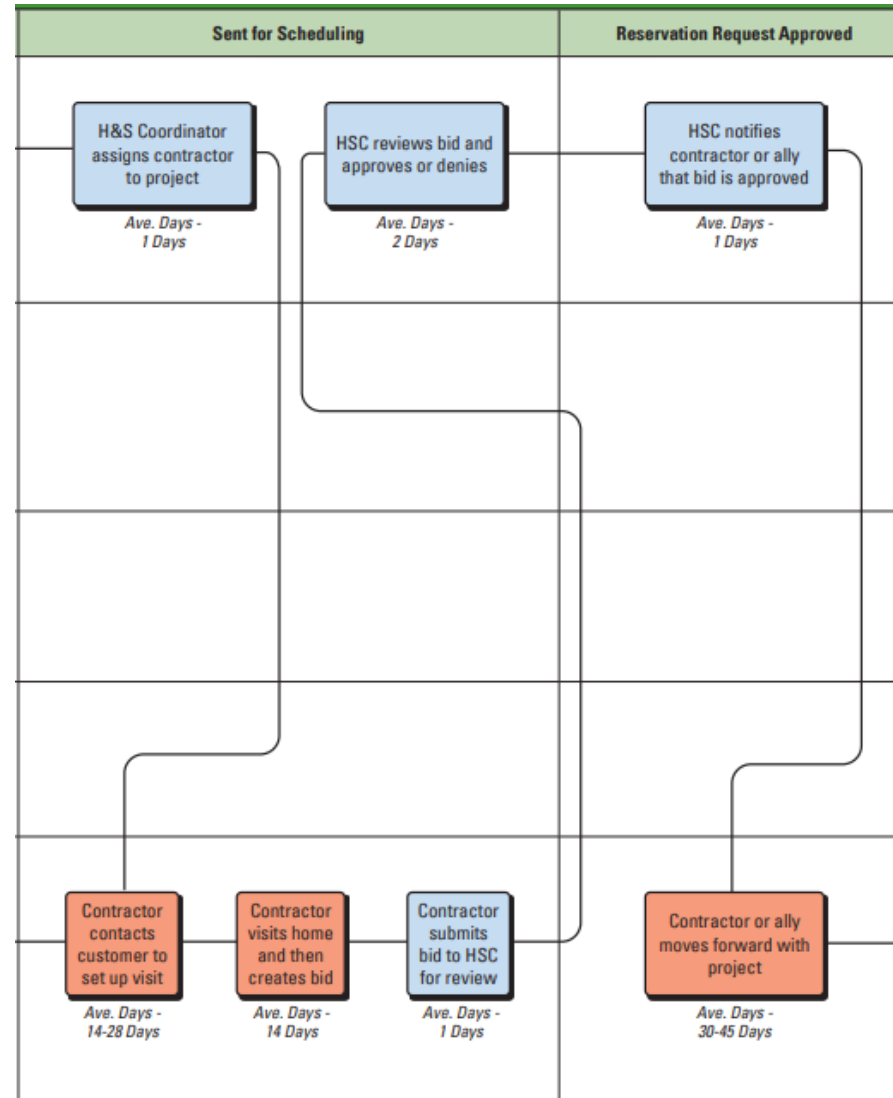
Remediation Process

Health and Safety Opportunity – Sent for Scheduling Stage

- Contractor contacts customer, completes bid, and submits bid to Health and Safety Coordinator.
- Health and Safety Coordinator evaluates bid and approves or denies.

Health and Safety Opportunity – Reservation Request Approved Stage

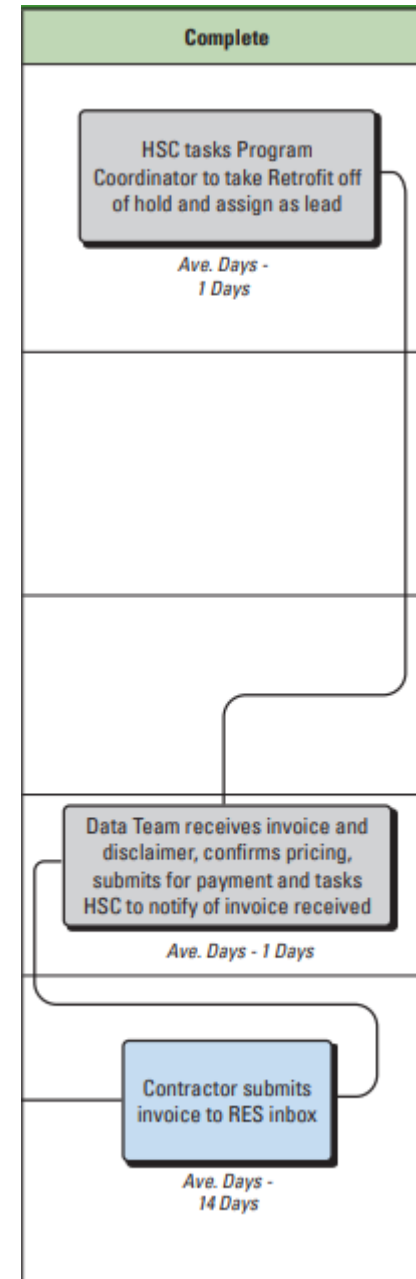
- If approved, contractor completes project.



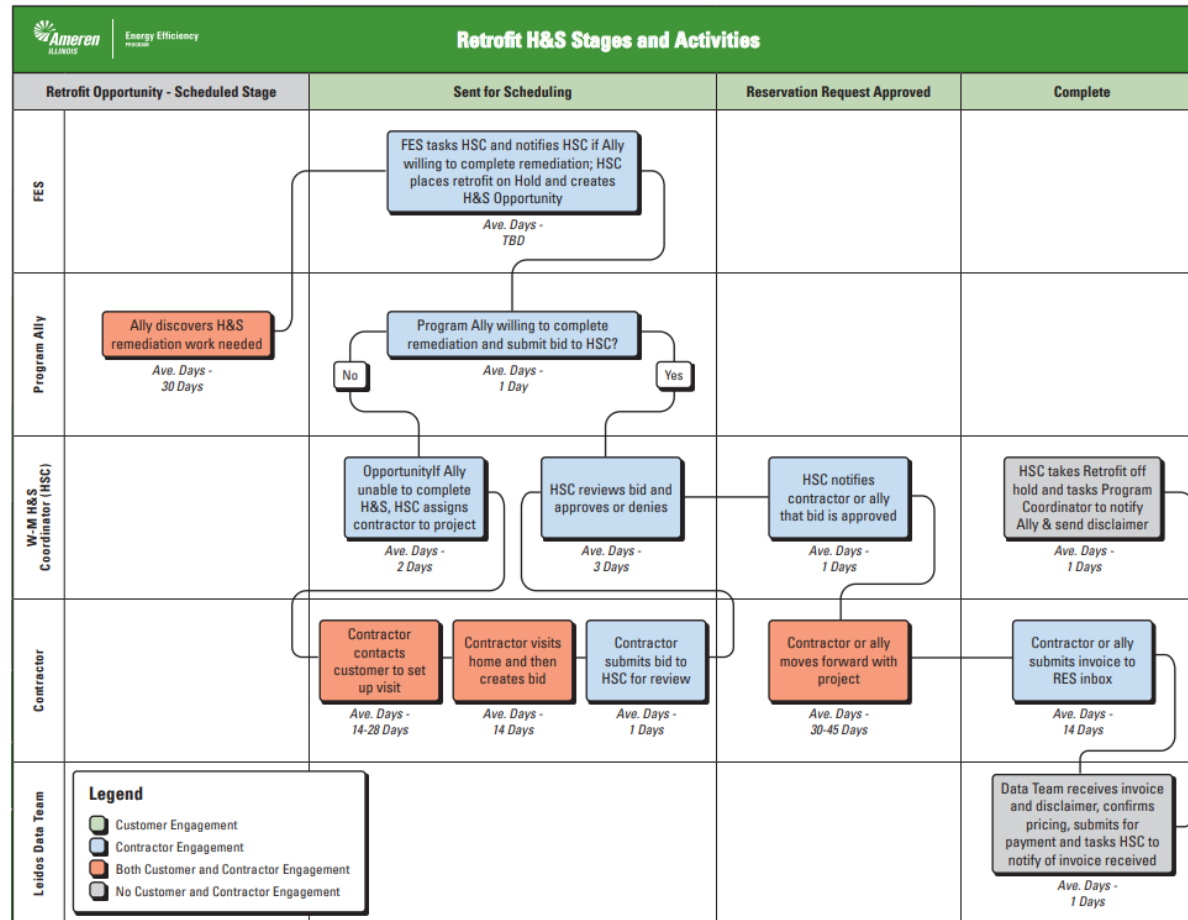
Remediation Process

Health and Safety Opportunity – Complete Stage

- Once project is completed, contractor submits invoice via email to the RES inbox.
- Data team receives invoice and disclaimer for processing and notifies Health and Safety Coordinator.
- The Health and Safety Coordinator tasks Program Coordinator to take Retrofit off hold and assign as a lead.



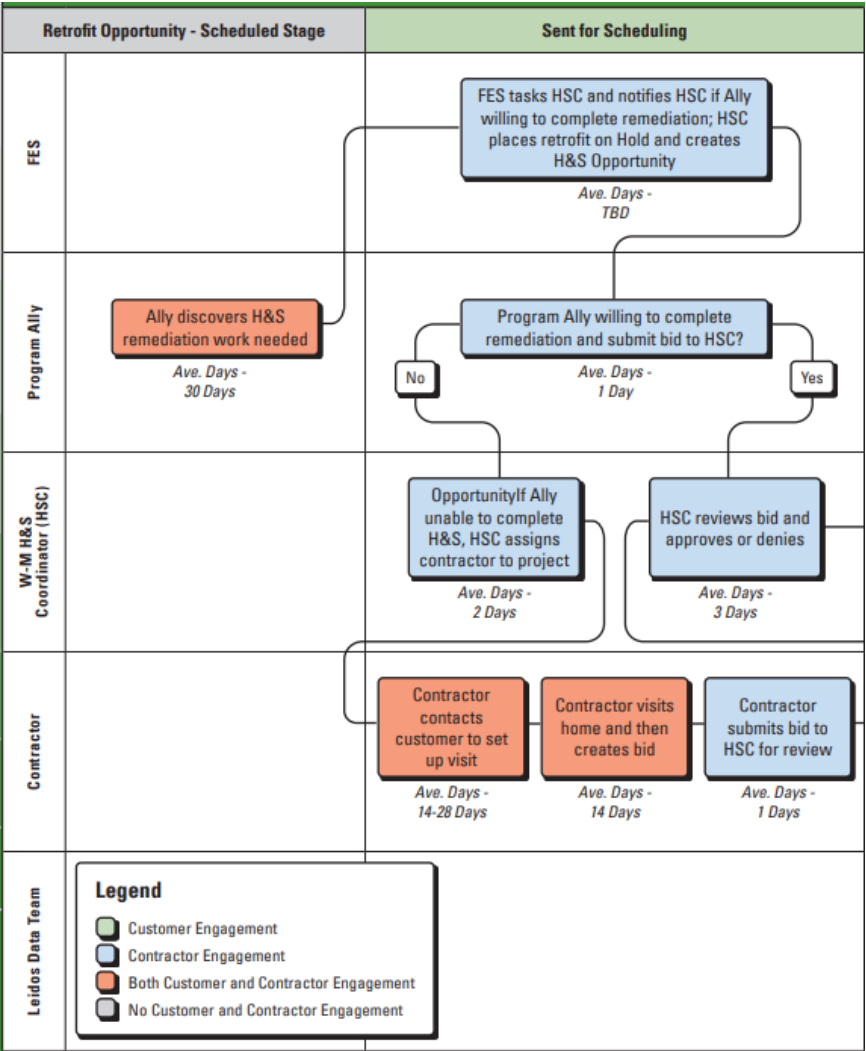
Health and Safety Showstoppers found during a Project Lead (Retrofit Remediation Health and Safety)



Retrofit Remediation Process

Retrofit Opportunity – Sent for Scheduling Stage

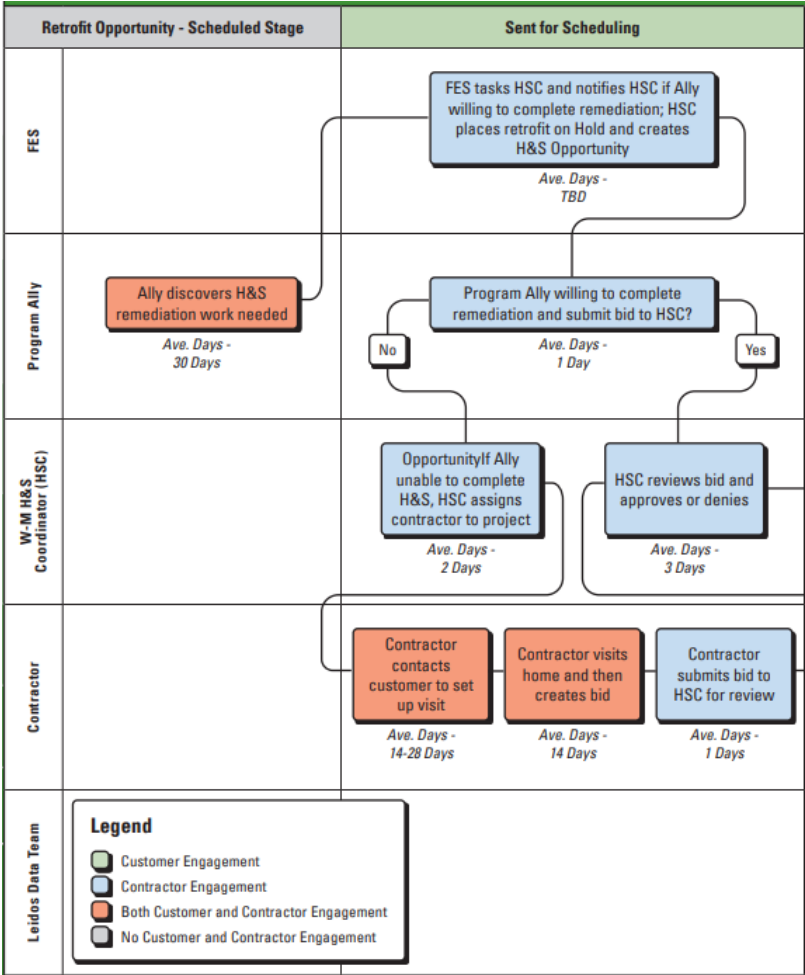
- The Program Ally discovers Health and Safety remediation work needed. Program Ally stops all work, contacts their Field Energy Specialist and notifies the Field Energy Specialist if they are willing to complete the required remediation themselves. If so, the Program Ally also submits a bid for recommended remediation when they contact the Field Energy Specialist.



Retrofit Remediation Process

Health and Safety Opportunity – Sent for Scheduling Stage

- The Field Energy Specialist tasks the Health and Safety Coordinator in Retrofit opportunity, notifies the Health and Safety Coordinator if the Program Ally is willing to complete remediation and attached bid if one is submitted.
- The Health and Safety Coordinator places Retrofit opportunity on hold and creates Health and Safety opportunity.
 - › If the Program Ally has submitted a bid for remediation, skip to step #6 in the process flow.
- If the Program Ally is unable to complete Health and Safety remediation, the Health and Safety Coordinator assigns a contractor to project.
- Contractor contacts the customer, creates bid and submits bid to the Health and Safety Coordinator.
- The Health and Safety Coordinator evaluates bid and approves or denies.



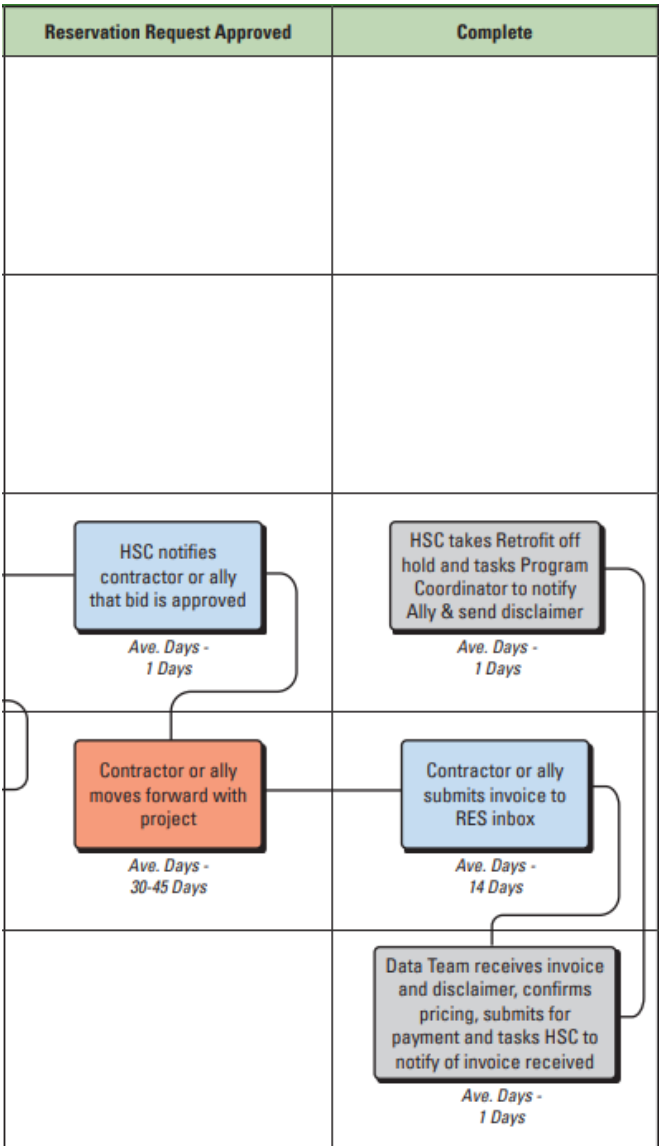
Retrofit Remediation Process

Health and Safety Opportunity – Reservation Request Approved Stage

- If approved, contractor or Program Ally completes project.

Health and Safety Opportunity – Complete stage

- Once the project is completed, the Program Ally or contractor submits invoice via email to the RES inbox.
- Data team receives invoice and disclaimer for processing and notifies the Health and Safety Coordinator.
- The Health and Safety Coordinator takes Retrofit opportunity off hold and tasks the Program Coordinator to notify Ally and send disclaimer.
- The Program Ally restarts Retrofit/BE work.



Other HEIQ Updates

- **High Need CAC Status**

- › Designated funding will likely be utilized by end of August
- › Field Energy Specialists will keep you notified

- **Emergency Heat Restoration for 2025-2026 Season Shifting to High Need**

- › Number/budget isn't limited; however, they must now meet the criteria
- › Criteria
 - Resident(s) ages 60 years and older
 - Families with children under 6 years old
 - Expectant mothers
 - Resident(s) with a disability

Other HEIQ Updates

- **Water Heater Prioritization Update**

- › Within the scope of a qualified project, when water heater replacement is determined and confirmed by a Field Energy Specialist, evaluate in the following order:
 - › If existing fuel source is gas
 - ENERGY STAR™ tankless natural gas
 - ENERGY STAR power-vented
 - ENERGY STAR heat pump
 - Non-ENERGY STAR options
 - › If existing fuel source is electric
 - ENERGY STAR heat pump
- › NOTE: Natural gas water heater replacement should only be used if it is a Health and Safety concern
- › Remember to consider the house and household for most cost-effective and energy-efficient solution
- › Limited fuel switching is still allowed
- › Customer education is a must!

Questions?

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