Southeast in a Time of Crisis: Impacts and Innovations

May 20, 2020, 2 p.m.
Housekeeping

WELCOME!
• All attendees will be automatically placed on mute throughout the webinar.

Q&A
• Please submit all questions using the question feature.
• Questions will be addressed at the end of the webinar
• If we don’t get to your question today, we’ll respond on our COVID-19 Resources page.

RESOURCES
• Following the webinar, we will share the slides and recording on our website and send them via email to all registrants, even if they weren’t able to attend.
The Southeast Efficient Energy Alliance (SEEA) promotes energy efficiency as a catalyst for economic growth, workforce development and energy security across 11 southeastern states including Alabama, Arkansas, Florida, Georgia, Kentucky, Louisiana, Mississippi, North Carolina, South Carolina, Tennessee and Virginia.
Areas of Work

- Energy Efficiency Policy
- Built Environment
- Energy Efficient Transportation
- Regional Investments
Why Energy Efficiency Matters Now

OUR ROLE
SEEA works to move the energy sector forward so that all people in the Southeast can live and work in healthy and resilient buildings, utilize clean and affordable transportation, and thrive in a robust and equitable economy.

Energy-Efficient Policy
Supports decision-makers at the state, local, and utility levels by identifying energy-efficient solutions to fit stakeholder needs.

Built Environment
Empowers partners to strengthen energy and building codes to increase access to healthy and resilient housing.

Energy-Efficient Transportation
Advances policies and programs that expand efficient transportation options, drive innovation, and improve air quality.

Diversity & Equity
Pursues equitable energy solutions and works to leverage the collective knowledge and strength of the Southeast.
Our Values

**Take Initiative**
We take responsibility for realizing a better quality of life in the Southeast.

**Earn Trust**
We pursue our work with benevolence, competence, and reliability.

**Value Others**
We seek, respect, and promote diverse perspectives.

**Pursue Equitable Solutions**
We recognize, acknowledge, and account for a history of prejudice and inequality in Southeastern communities and the role it plays in the issues we address.
Our COVID-19 Response Strategy

Q2 – Q3
Gather Data and Assess Impact
Engage with our members, partner organizations, and other stakeholders to assess, track, and report on how the sector is being impacted.

Q3 – Q4
Protect the Most Vulnerable
Raise awareness of growing energy debt crisis and identify socially responsible strategies to address it.

Q4 – 2021
Rebuild for Resilience
Support state and federal efforts to rebuild economies through effective energy optimization strategies.
Today’s Presenters

Mandy Mahoney
President

Claudette Ayanaba
Policy Manager

Cyrus Bhedwar
Director of Policy

Anne Blair
Director of Energy Efficient Transportation

Maggie Kelley
Built Environment Project Manager

Will Bryan
Built Environment Project Manager

Maddy Clowse
Energy Efficient Transportation Program Intern

Sarah Burgher
Communications Manager

Emme Luck
Policy Associate
Today’s Agenda

I. REGIONAL POLICY SUMMARY

II. IMPACTS: UTILITY PROGRAMS

III. IMPACTS: ENERGY EFFICIENCY & RELATED INDUSTRIES

IV. ENERGY INSECURITY

V. RESOURCES & OPPORTUNITIES

VI. Q&A
Who is our audience today?
Regional Policy Summary

Claudette Ayanaba
Policy Manager
Stay-at-Home Orders

- No stay-at-home mandate
- Mandate lifted
- Mandate in place, some restrictions lifted
- Mandate still in place
# Legislative Sessions

<table>
<thead>
<tr>
<th>State</th>
<th>Original Session Dates</th>
<th>Changes</th>
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<tbody>
<tr>
<td>AL</td>
<td>Feb. 4-May 19</td>
<td>Reconvened May 4</td>
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<tr>
<td>AR</td>
<td>Apr. 8-May 7</td>
<td>Adjourned sine die April 24</td>
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<tr>
<td>FL</td>
<td>Jan. 14-Mar. 13</td>
<td>Adjourned sine die March 19</td>
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<td>GA</td>
<td>Jan. 13-Mar. 27</td>
<td>Suspended until June 11</td>
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<tr>
<td>KY</td>
<td>Jan. 1-Apr. 15</td>
<td>Reconvened April 14</td>
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<tr>
<td>LA</td>
<td>Mar. 9-Jun. 1</td>
<td>Reconvened May 4</td>
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<tr>
<td>MI</td>
<td>Jan. 7-Mar. 10</td>
<td>Reconvened May 7</td>
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<tr>
<td>NC</td>
<td>May 13-Jun. 3</td>
<td>Convened April 29</td>
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<tr>
<td>SC</td>
<td>Jan. 14-May 14</td>
<td>Reconvened May 12</td>
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<tr>
<td>TN</td>
<td>Jan. 14-Apr. 22</td>
<td>Recess until June 1</td>
</tr>
<tr>
<td>VA</td>
<td>Jan. 8-Mar. 7</td>
<td>Adjourned sine die March 12</td>
</tr>
</tbody>
</table>
State Legislation
Pending and Passed Notable Legislation

Pending

Georgia
HR 1430
HB 732

South Carolina
H 5335

Passed

Virginia
Clean Economy Act
Clean Energy and Community
Flood Preparedness Act

Florida
HB 7018
EV Roadmap
VW Funding
# Utility Disconnection Suspensions

<table>
<thead>
<tr>
<th>State</th>
<th>Announcement Date</th>
<th>Lift Date</th>
<th>Notes &amp; Resources</th>
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<tbody>
<tr>
<td>AL</td>
<td>March 17</td>
<td>Utility Led</td>
<td>APSC Statement</td>
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<tr>
<td>AR</td>
<td>Unknown</td>
<td>Lift of State of Emergency</td>
<td>APSC Info. Page</td>
</tr>
<tr>
<td>FL</td>
<td>Unknown</td>
<td>Utility Led</td>
<td>FPSC Website</td>
</tr>
<tr>
<td>GA</td>
<td>Unknown</td>
<td>Utility Led</td>
<td>GPSC Info. Page</td>
</tr>
<tr>
<td>KY</td>
<td>March 16</td>
<td>Commission Led</td>
<td>KPSC Order</td>
</tr>
<tr>
<td>LA</td>
<td>March 13</td>
<td>Phase II of OUAA*</td>
<td>LPSC Statement</td>
</tr>
<tr>
<td>MS</td>
<td>March 15</td>
<td>60 days</td>
<td>MPSC Order</td>
</tr>
<tr>
<td>NC</td>
<td>March 19</td>
<td>Lift of State of Emergency</td>
<td>NCUC Order</td>
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<tr>
<td>SC</td>
<td>March 19</td>
<td>Lift of State of Emergency</td>
<td>SCPSC Order</td>
</tr>
<tr>
<td>TN</td>
<td>March 26</td>
<td>Lift of State of Emergency</td>
<td>TVA Statement</td>
</tr>
<tr>
<td>VA</td>
<td>March 16/April 9</td>
<td>60 day (30-day extension)</td>
<td>SCC Order</td>
</tr>
</tbody>
</table>

* Opening Up America Again
Public Service Commissioners

Upcoming elections and appointments

**Alabama**
Twinkle Cavanaugh, Chair
- Public Election
- Scheduled for November

**South Carolina**
Comer Randall, Chair
- Swain Whitfield
- Gordon Hamilton
- Butch Howard
- Elected by Legislature
- Expected in the fall

**Georgia**
Lauren “Bubba” McDonald
Jason Shaw
- Public Election
- Scheduled for November

**Virginia**
1 Vacancy
- Elected by General Assembly; session ended so anticipated appointment by governor and confirmation by legislature next year
Impacts: Utility Programs

Cyrus Bhedwar
Director of Policy
Electric Load

Florida daily weekday electricity demand, Jan-Apr 2020
thousand megawatthours (MWh)

- Nonessential businesses in some Florida counties begin to close
- Florida schools begin to close
- Florida stay-at-home order in effect; nonessential businesses close statewide

Source: U.S. Energy Information Administration, Hourly Electric Grid Monitor; National Oceanic and Atmospheric Administration, Aviation Weather Center and National Centers for Environmental Information.

Note: Temperature shown is the flat average of daily average temperatures in Miami, Orlando, and Tampa in Florida.
Status of Utility Energy Efficiency Programs

**PAUSED**
Residential on-site programs

**ADAPTED**
Energy efficiency savings kits

**INNOVATIVE**
Targeting empty facilities
Future of Energy Efficiency Programs

Some questions to consider

- Virtualization of audits
- Maintenance of EE goals
- Demand shifts
- Return to “normal”
- Changed expectations
- Transportation
- So what does all this mean?
## Regulatory Proceedings

<table>
<thead>
<tr>
<th>State</th>
<th>Adapted Practices</th>
<th>Resources</th>
</tr>
</thead>
<tbody>
<tr>
<td>AL</td>
<td>Physical attendance discouraged</td>
<td>PSC Press Release and Live Stream</td>
</tr>
<tr>
<td>AR</td>
<td>Physical attendance discouraged</td>
<td>PSC COVID-19 Webpage</td>
</tr>
<tr>
<td>FL</td>
<td>Offices closed to public</td>
<td>Statement from Chairman and Stream</td>
</tr>
<tr>
<td>GA</td>
<td>Hearings broadcasted</td>
<td>PSC YouTube Channel</td>
</tr>
<tr>
<td>KY</td>
<td>Offices closed to public</td>
<td>PSC Order and Hearing Archive</td>
</tr>
<tr>
<td>LA</td>
<td>Offices closed to public</td>
<td>PSC Website</td>
</tr>
<tr>
<td>MS</td>
<td>Meetings held via teleconference</td>
<td>PSC YouTube Channel</td>
</tr>
<tr>
<td>NC</td>
<td>Public hearings postponed</td>
<td>NCUC Press Release</td>
</tr>
<tr>
<td>SC</td>
<td>Physical attendance suspended</td>
<td>PSC Live Stream</td>
</tr>
<tr>
<td>VA</td>
<td>Physical attendance suspended</td>
<td>SCC Webcasting</td>
</tr>
</tbody>
</table>
Utility Electric Vehicle Program Highlights

North Carolina & South Carolina
Duke EV Pilot

Virginia
Dominion – Vehicle to Grid Transportation Electrification
Energy Codes Status Update
Building and Energy Code Adoption

- Paused Process
- Ongoing Update
- No Impact
Impacts: Energy Efficiency & Related Industries

Cyrus Bhedwar, Director of Policy
Anne Blair, Director of Energy Efficient Transportation
Maggie Kelley, Built Environment Project Manager
Energy Efficiency Workforce

• **3.4 million** clean energy workers

• **2.38 million** in energy efficiency

• **242,000** in partial or all-electric vehicle production
Southeast Energy Efficiency Workforce

Energy Efficiency Workers by State, 2019

- AL
- AR
- FL
- GA
- KY
- LA
- MS
- NC
- SC
- TN
- VA

Southeast Energy Efficiency Workforce Losses

March – April 2020

Clean Energy Employment Initial Impacts from the COVID-19 Economic Crisis, E4 The Future, April 2020
Energy Efficiency Job Losses: March 2020

Clean Energy Employment Initial Impacts from the COVID-19 Economic Crisis, E4 The Future, April 2020
Energy Efficiency Job Losses: April 2020

April 2020 Clean Energy Job Losses

Clean Energy Employment Initial Impacts from the COVID-19 Economic Crisis, E4 The Future, April 2020
Minority Energy Efficiency Workforce

**CLEAN ENERGY WORKFORCE**
- **Nonwhite**: 41%
- **White**: 59%
- **Hispanic/Latinx**: 14%
- **Non Hispanic/Latinx**: 86%

**CLEAN ENERGY JOB LOSSES**
- **Nonwhite**: 63%
- **White**: 37%
- **Hispanic/Latinx**: 25%
- **Non Hispanic/Latinx**: 75%
Response Trends

REMOTE WORK

SELF-INSTALL SERVICES

COMMUNITY RESPONSE
Retaining the Workforce

**ADMINISTRATIVE SUPPORT**
Pay administrative costs so implementers can retain employees

**SHIFTING FIELD STAFF**
Moving staff to call center operations

**INCREASING INCENTIVES**
Adjusting budgets to increase rebate programs
Workforce Recovery

SAFETY PROTOCOLS & TRAINING
What steps are necessary to restart programs?

MODERN WORKFORCE DEVELOPMENT
National efforts to modernize and scale energy efficiency training
Energy-Efficient Transportation Sales

2 million EV sales globally in 2018; 63% increase from 2017
Energy-Efficient Transportation Forecast

Global long-term passenger vehicle sales by drivetrain

Source: BloombergNEF
Energy-Efficient Transportation Industry

SHUTDOWNs

Tens of thousands of employees furloughed from auto plants

Furloughs throughout the dealership network

SALES DROP

U.S. auto market down 50% in April

Auto market in China is down 80%; EV market projected to drop 90%
Electric Vehicle Production

Schedule Delays

Chevy Bolt

Ford Mach-E

Rivian

Hummer
## Manufacturing Opening Dates

<table>
<thead>
<tr>
<th>Name or Location</th>
<th>Open Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manufacturers in Michigan</td>
<td>May 11</td>
</tr>
<tr>
<td>General Motors</td>
<td>May 18</td>
</tr>
<tr>
<td>Ford</td>
<td>May 18</td>
</tr>
<tr>
<td>Fiat</td>
<td>May 18</td>
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<td>Daimler</td>
<td>May 18</td>
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<td>Volkswagen</td>
<td>May 18</td>
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<tr>
<td>BMW</td>
<td>May 18</td>
</tr>
<tr>
<td>Tesla</td>
<td>Approval to open by May 22</td>
</tr>
</tbody>
</table>
Consumer Behavior

CHARGING INFRASTRUCTURE

Utilization is down, but developments and upgrades continue

CLEANER AIR

25% - 30% reduction in nitrogen oxide in some parts of the country

Exposure to air pollution is linked to higher rates of death in COVID-19 cases
Construction & Related Industries

WEATHERIZATION

Deemed unsafe for residents and workers

CONSTRUCTION

Residential construction is down 30%

8% drop in housing construction completion
Code Compliance

TRAINING

Virtual compliance methods from permitting to inspections

Training for officials, builders, and contractors

NO CONTACT INSPECTIONS

Regional differences in adoption
Energy Insecurity

Will Bryan
Built Environment Project Manager
Average Energy Burden by County

Data: Low Income Energy Affordability Tool (LEAD), U.S. DOE
Energy Insecurity before COVID-19

- **South**
  - Experience any energy insecurity: 6.2
  - Receive disconnect notices: 3.2
  - Reduce consumption of food or medicine to pay for energy: 4

- **West**
  - Experience any energy insecurity: 7.4
  - Receive disconnect notices: 3.8
  - Struggle to maintain healthy indoor temperature: 2.7

- **Midwest**
  - Experience any energy insecurity: 8.1
  - Receive disconnect notices: 2.7
  - Struggle to maintain healthy indoor temperature: 3.1

- **Northeast**
  - Experience any energy insecurity: 15.4
  - Receive disconnect notices: 2.2
  - Struggle to maintain healthy indoor temperature: 5

*Units: households (in millions)*

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[SEEA Logo]
Job & Income Loss Forecast

**JOB LOSSES**

13% of adults reported that they lost a job or were furloughed in March or April

6.7 million unemployment claims in the Southeast

**INCOME LOSS**

39% of those making under $40,000 a year reported being laid off or furloughed during this same period.

**FINANCIAL SAFETY NET**

53% of low-income households, 25% of middle-income households, and 11% of upper-income households report that they will have difficulty paying bills due to COVID.
Increased Residential Energy Use & Costs on Consumers

Home energy use could go up by an estimated **20-40%**

Residential demand is **up 20%** in Austin, TX

Residential demand is **up 15-20%** in CA
Residential Energy Use & Summer Cooling Loads

Cooling degree days by Census division in 2018

Note: Population-weighted degree days. Pacific division includes Alaska and Hawaii.
Source: U.S. Energy Information Administration, Monthly Energy Review, Table 1.10, December 2019

HDD 65  CDD 65
Debt Accumulation During Shutoff Moratoria

Based on estimates from the National Consumer Law Center (NCLC)
Managing Arrearages

UNIFORM MORATORIA

PAYMENT OPTIONS
6-month payment plans; income-based plans; waived fees

INCREASED FUNDING FOR LIHEAP
What is the Full Range of COVID-19 Impacts?

Energy Use Survey of SEEA Staff, Board, & Friends, May 2020
Resources & Opportunities

Claudette Ayanaba
Policy Manager
SEEALLIANCE.ORG COVID-19 RESOURCES

SEEALLIANCE.ORG COVID-19 RESOURCES

seealliance.org/resource-center/covid-19-resources
Opportunities & Calls to Action

Faces of EE
Tell your COVID-19 story

HOPE4HOMES
Letter to ask Congress to support contractors & homeowners

Blog Post
Call to Action

Blog Post
Proposals & Initiatives

Recommendations
Get America Moving Again (GAMA)

Call to Action
Letter to Congress regarding a new transportation framework

Webinar
Information on Four Federal Stimulus Priorities
What resources would be most helpful to you during the pandemic & recovery period?
What topics that we addressed today would you like to attend convenings around for further discussion? What formats of virtual or small group convenings would you propose?
What topics didn’t we address today that you’d like to learn more about?
Q & A
What’s Next?

01 GATHER DATA
Track industry data and report on the impacts to operations and economic health. (e.g. job losses, revenue erosion, energy debt in aggregate and by customer type)

02 STORYTELLING
Seek and promote narrative examples of impacts to the industry and how it affects people’s lives. (e.g. blog posts, interviews)

03 COMMUNITY BUILDING
Create forums and engagement opportunities for SEEA members and stakeholders to be in community with each other and share information.
COVID-19 Corps
Interrupting video calls since 2020

Jazmine
Sawyer
Wyatt
Charlie
Bear & Winston

Jack
Juniper
Ti & Libby
Jehan
Zirak

Teddy
BRONzer
Paul & Ferris
Nash Vegas
Gaylin & Sawyer

SEEA
SOUTHEAST ENERGY EFFICIENCY ALLIANCE
Thank You

SMART ENERGY. STRONG ECONOMY. FOR ALL.

WWW.SEEALLIANCE.ORG