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November 20, 2018

VIA ELECTRONIC FILING

M. Lynn Jarvis
Chief Clerk
North Carolinas Utilities Commission
4325 Mail Service Center
Raleigh, North Carolina 27699-4300

**RE: Distribution of Funds
Docket Nos. E-2, Sub 1095; E-7, Sub 1100; and G-9, Sub 682**

Dear Ms. Jarvis:

This letter is intended to update the Commission on the achievements of the Duke Energy Helping Home Fund ("Helping Home Fund") and to describe a modification in the approach that the Commission has previously approved for serving Duke Energy customers through the Helping Home Fund. At the direction of the Commission, Duke Energy created the Duke Energy Helping Home Fund to leverage funding and resources from federal, state and local programs involved with energy improvements for low-income residents. Duke Energy Carolinas, LLC ("DEC") and Duke Energy Progress, LLC ("DEP") (collectively, the "Companies") launched the Helping Home Fund in 2015 after the Commission approved their proposals for distribution of the initial installment of \$20 million in funds from their recent general rate cases. The Companies' approach maximized program benefits for Duke Energy customers and ensured that designated dollars were spent directly for the benefit of low-income households. By improving the energy efficiency of low-income households, the Helping Home Fund, in turn, increased the affected customers' level of disposable income. Helping Home funds are distributed through the state weatherization agencies and other non-profits serving low-income customers. This letter describes the beneficial impacts that Helping Home Fund has had on Duke Energy's customers over the past three years and also outlines a proposed adjustment in the funding amounts for the heating and cooling repair components of the program, based on Duke Energy's experience with the Helping Home Fund.

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Nov 20 2018

Description of the Helping Home Fund

The Commission approved the initial installment of funds for the Helping Home Fund in its February 27, 2014 *Order Approving Plan for Distribution of Ratepayer Funds*, in DEP's general rate case in Docket No. E-2, Sub 1023, and DEC's general rate case in Docket No. E-7, Sub 1026 ("Ratepayer Assistance Orders"). In the Ratepayer Assistance Orders, the Commission approved DEP's and DEC's proposals for the distribution of \$10 million in funds from DEP and \$10 million in funds from DEC for the low-income assistance and Companies' approach for distributing these funds. As approved in the Ratepayer Assistance Orders, the Helping Home Fund targeted customers at or below 200% of the Federal Poverty Guidelines and supplemented Duke Energy's weatherization program by providing monies up front for health and safety repairs, limited to \$3,000 per home unless approved in writing by Duke Energy. The health and safety repairs included structural repairs, electrical, plumbing, mold/lead remediation, and other measures that 1) were not currently covered by weatherization agencies; 2) cost more than the allowable expense for weatherization; or 3) benefitted homes no longer eligible for weatherization services. The Helping Home Fund also provided new Energy Star appliances, including refrigerators, washers, dryers, room air conditioners and dehumidifiers, to eligible customers, with the total appliance cost limited to \$2,000 per home unless approved in writing by Duke Energy. In the Ratepayer Assistance Orders, the Commission also approved up to \$10,000 per home to be used for conversion of low performance gas, oil, and electric heating systems to heat pumps. This work included new duct work and electrical upgrades if needed. As part of its review of Duke Energy's merger with Piedmont Natural Gas Company, the Commission approved an additional provision of \$2.5 million in funds to the Helping Home Fund to the DEC and DEP service territories through its March 31, 2017 *Order Approving Plan for Distribution of Workforce Development and Low-Income Energy Assistance Funds*, in Docket Nos. E-2, Sub 1095, E-7, Sub 1100, and G-9, Sub 682. Upon request by DEC, DEP and Piedmont Natural Gas Company, the Commission modified the Helping Home Fund by reducing the \$10,000 amount per home for work on heating and cooling systems to \$800. Currently 76% of the monies allocated through the Piedmont merger to the DEP service territory and 85% of the monies allocated to the DEC service territory have been spent. Recently, the Commission approved an additional \$2.5 million for the Helping Home Fund in DEP's 2017 general rate case; however, no additional funds were approved for the DEC service territory.

Impacts of the Helping Home Fund

The Helping Home Fund has had wide-ranging and profound impacts on improving the lives of Duke Energy's North Carolina low-income customers. Since its inception, more than 4,000 families have received assistance from the Helping Home Fund. In 2017, Advanced Energy, at the request of Duke Energy, performed a study of the Helping Home Fund's effects. Advanced Energy's study, which is attached to this letter for the Commission's information, highlighted that more than 1,300 homes that previously had non-functioning heating systems received new, functioning heating systems. With the Helping Home Fund, approximately 40% of the homes served would have been deferred by other low-income programs because of funding limitations and program guidelines. In

addition to the energy efficiency benefits provided by the Helping Home Fund, the home improvements provided increase property value, enhance fire safety, and reduce emissions.

Modification to Approach

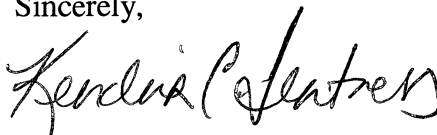
As noted above, upon receipt of the \$2.5 million from the Piedmont merger, Duke Energy limited repairs and tune-ups on HVAC systems to \$800 per home unless approved in writing by Duke Energy.

Pursuant to a Stipulation reached between DEP and certain parties in the latest Duke Energy Progress rate case, Duke Energy is providing another \$2.5 million to assist low-income customers. Based on Duke Energy's experience gained in administering the Helping Home Fund, it has learned that installing new duct work or duct insulation is of great benefit to customers and is an effective use of Helping Home Fund monies. To allow more eligible customers to have duct work or duct insulation installed, Duke Energy plans to increase the amount allowed for repairs and tune-up on HVAC systems to \$1,000 per home. In addition, Duke Energy plans to allow a total of \$4,000 to be available to address new heating systems, duct work, duct insulation and/or duct sealing.

The Companies discussed this proposal with the Public Staff of the North Carolina Utilities Commission on October 29, 2018, and it agrees with the approach. Unless otherwise directed by the Commission, Duke Energy intends to implement these changes in the Helping Home Fund by January 1, 2019.

Please do not hesitate to contact me if you have any questions.

Sincerely,



Kendrick C. Fentress

Enclosure

cc: Parties of Record



EVALUATION OF DUKE ENERGY'S HELPING HOME FUND

October 15, 2017



EXECUTIVE SUMMARY

Between 2015 and 2017, Duke Energy worked with the North Carolina Community Action Association (NCCAA) and Lockheed Martin to administer the Helping Home Fund, a program helping low-income customers improve their health and safety and manage their energy costs.

Duke Energy was the funding sponsor, with Duke Energy Carolinas and Duke Energy Progress providing a total of \$20 million to support appliance replacement, health and safety measures, weatherization, and heating/cooling replacement and repair in participating homes. NCCAA was chosen as the program administrator and contracted with Lockheed Martin to assist with implementation.

In all, the Helping Home Fund reached 3,516 homes with an average of \$5,151 in performed work per home. The Helping Home Fund was designed to leverage additional funding as well, including the State Weatherization Assistance Program (NCWAP), which consists of U.S. Department of Energy (DOE) Weatherization Assistance Program (WAP) and Low Income Home Energy Assistance Program (LIHEAP) funds, the PNC Home Beautification Fund, and funds from the North Carolina Housing Finance Agency (NCHFA). Without the Helping Home Fund, more than 40 percent of the participating homes would have been deferred due to funding limitations and program guidelines in the NCWAP. During the time period that the Helping Home Fund was operating, the program spent \$20 million. Leveraged funding included:

- **NCWAP: \$17 million**
- **PNC Home Beautification: \$250,000**
- **NCHFA: \$234,000**

Funds were also leveraged from other private funding sources, such as the City of Raleigh and City of Charlotte Urgent Repair Programs, but we were unable to obtain data on their funding levels.

Duke Energy had an interest in understanding the full impact of the program, including leveraging opportunities, and economic and non-energy impacts, such as health, safety and comfort. A number of approaches were taken for this effort. First, the team developed two surveys that were distributed to participating homeowners and service providers. The surveys gauged views of the Helping Home Fund and how people thought the program impacted the lives of families and the larger community. Second, a review of prior research evaluated the monetized values of potential energy and non-energy benefits associated with the program.

Results from the surveys demonstrated that both homeowners and service providers had a very favorable view of the Helping Home Fund. Homeowners noted that they felt safer, more comfortable and healthier in their homes, and reported financial savings that would allow them to pay for other necessities. Service providers applauded the program for its flexibility, staff and communication. Furthermore, the literature review of other low-income weatherization programs revealed that homeowners experienced a variety of non-energy benefits. Conservative estimates in the literature found monetized values for these benefits to be between \$4,500 and \$10,000 per home.

With the success of the program and the merger between Duke Energy and Piedmont Natural Gas, an additional \$2.5 million will be used for a similar program to provide assistance to even more income-qualified families in North Carolina.

The Helping Home Fund reached 3,516 homes with an average of \$5,151 in performed work per home.



INTRODUCTION

As a result of the Duke Energy North Carolina rate cases in 2013, Duke Energy allocated \$20 million (\$10 million from Duke Energy Carolinas [DEC] and \$10 million from Duke Energy Progress [DEP]) to assist low-income customers. For both utilities, the \$10 million was allocated in the following ways: \$3 million was used for health and safety measures and appliance replacement (for DEP, some of these funds also went toward weatherization; DEC has a separate weatherization program), and \$7 million was used for heating/cooling system replacement and repair. The actual breakdown of the funds at the time of this report can be seen in **Table 1**.

The program provided income-qualified customers with repairs and energy efficiency upgrades at no cost.

This program, known as the Helping Home Fund, ran from January 2015 to May 2017. The goal of the funding was to assist low-income customers. Duke Energy saw an opportunity to provide assistance that did not currently exist by providing health and safety repairs, new energy-efficient appliances, and heating systems to help homeowners manage energy costs and increase their disposable income. To meet this

goal, the Helping Home Fund worked primarily through weatherization service providers as well as other non-profit agencies that serve families at or below 200 percent of federal poverty guidelines. The program provided income-qualified customers with repairs and energy efficiency upgrades at no cost.

The Helping Home Fund was funded by Duke Energy and administered by the North Carolina Community Action Association (NCCAA). NCCAA partnered with Lockheed Martin, who provided the database for data tracking and reporting, and quality assurance (QA) and quality control (QC). The Helping Home Fund was designed to leverage the State Weatherization Assistance Program (NCWAP) and other public/private funding sources. The funds were allocated to local North Carolina weatherization service providers and several non-profit agencies who completed the projects and were reimbursed once the work was completed. The program was allowed to use 10 percent of the funding for administrative purposes, with 5 percent going to the administrator and 5 percent to the service providers.

The monies were transmitted in total to the NCCAA to manage and deposited at PNC Bank. As a result, PNC Bank suggested that the NCCAA apply for a grant from their foundation, which ultimately provided another \$250,000 for Helping Home Fund recipients for external beautification or maintenance, such as painting, roof repairs or landscaping.

TABLE 1 • HELPING HOME FUND BREAKDOWN

	DEC	DEP	TOTAL
APPLIANCE REPLACEMENT	\$950,343	\$620,399	\$1,570,742
HEALTH & SAFETY	\$1,765,387	\$873,998	\$2,639,385
HEATING/COOLING REPLACEMENT/REPAIR	\$6,395,779	\$6,388,239	\$12,784,018
WEATHERIZATION TIER 1		\$100,217	\$100,217
WEATHERIZATION TIER 2		\$1,018,932	\$1,018,932
PROJECT TOTAL	\$9,111,509	\$9,001,785	\$18,113,294
AVERAGE PER HOUSE			\$5,151
ADMINISTRATION	\$928,344	\$928,344	\$1,856,688
OVERALL TOTAL	\$10,039,853	\$9,930,129	\$19,969,982

INTRODUCTION

Because of federal regulations, the NCWAP has a limited amount of funding it can use per house for health, safety and energy measures. If repair monies were not available from either federal or local sources, the home would be deferred. The Helping Home Fund filled this gap, allowing the NCWAP to serve customers who would have otherwise been deferred by service providers by providing the funding to make the needed repairs. Furthermore, North Carolina weatherization agencies' energy efficiency improvements waitlist had been experiencing lengthy delays, and customers were not getting work scheduled or completed. The funding provided additional services to customers and helped to leverage federal and state funds for maximum customer benefit and impact.

The Helping Home Fund focused on four main components:

- 01 • Health and safety
- 02 • Appliance replacement
- 03 • Weatherization (in DEP territory only)
- 04 • Heating/cooling system replacement and repair

In DEC territory, homes already had access to weatherization through the existing energy efficiency Weatherization Program.

LM Captures is Lockheed Martin's tracking and reporting system that service providers used to enter the individual home data for the program. The database required comprehensive data input for customer, home and project details to determine eligibility and track program expenditures and measure level detail by project type. All program activities, including QA/QC and reimbursement request/fulfillment, were also reported.

Funds for health and safety were originally capped at \$800 per home, but due to customer needs learned throughout the program, the limit was later raised

to \$3,000. Health and safety measures included bath fans, vapor barriers, roof repairs, electrical/plumbing repairs, ingress/egress repairs, range repair and replacement, and water heater repair and replacement. Appliance replacement also started with an allotment of \$800 per home, but this amount was increased to \$2,000. This work included replacing inefficient appliances with ENERGY STAR® refrigerators, clothes washers, clothes dryers and room air conditioners.

Weatherization services were broken down into two tiers.

TIER 1

Tier 1 weatherization was for homes using < 7 kilowatt-hours (kWh) per square foot, < \$0.23 per square foot oil/liquid propane (LP) gas heat, or < \$0.38 per square foot oil/LP gas heat and water heating. Up to \$600 was allotted for the following measures:

- ✓ Heating system tune-up and cleaning
- ✓ Heating system repair
- ✓ Water heater wrap and pipe wrap for electric water heaters
- ✓ Cleaning or replacement of electric dryer vents
- ✓ ENERGY STAR-certified compact fluorescent lamps (CFLs)
- ✓ Low-flow showerheads and aerators
- ✓ Weatherstripping doors and windows
- ✓ Energy education

INTRODUCTION

TIER 2

Tier 2 weatherization was provided to homes using ≥ 7 kWh per square foot, $\geq \$0.23$ per square foot oil/LP gas heat, or $\geq \$0.38$ per square foot oil/LP gas heat and water heating. Here, up to \$4,000 was provided for the following:

-  Tier 1 services
-  Attic insulation
-  Air sealing
-  Duct sealing/repair
-  Wall insulation
-  Crawl space insulation
-  Floor insulation

Since heating/cooling systems account for the majority of an energy bill, 70 percent of the monies were allocated to improve customers' heating systems. The intent was to decrease customers' energy use, thereby providing them with more disposable income. Existing electric furnaces, electric baseboards, and oil or propane systems were replaced with high efficiency heat pumps (minimum 14 Seasonal Energy Efficiency Ratio [SEER] and 8.2 Heating Seasonal Performance Factor [HSPF]). In addition, many homes were found to have elderly residents with wood stoves, and new heating systems and ductwork were installed in these situations as well.

A maximum of \$10,000 could be used for heating/cooling system replacement and repair (\$6,000 max for heating/cooling and an additional \$4,000 to upgrade electrical and/or install new ductwork). Consistent with Tier 2 weatherization, heating/cooling system replacement and repair required energy usage per year to meet the following requirements:

- ≥ 7 kWh per square foot,
- $\geq \$0.23$ per square foot oil/LP gas heat, or
- $\geq \$0.38$ per square foot oil/LP gas heat and water heating.

High efficiency mini splits were allowed when a home did not have a centrally ducted system or the duct repairs exceeded an estimated threshold. Funds could also be used to upgrade the electrical system or repair/replace duct systems. All of the ductwork had to be insulated and sealed with mastic. Homes also had to have been weatherized as part of the installation of a new heating/cooling system, requiring proper sizing of the system.

STUDY DESCRIPTION AND METHOD

As the Helping Home Fund was nearing completion, Duke Energy had an interest in understanding the impacts of non-energy benefits among program participants and implementation service providers. Non-energy benefits can include a wide variety of improvements, such as those to economics, health, safety, quality of life and comfort. Studying and documenting these benefits helps determine the true cost-effectiveness of home energy programs and interventions.

In performing the analysis, the first step was to narrow down the array of potential non-energy benefits to specific ones to evaluate within the Helping Home Fund. The team selected health,

safety, comfort, improved disposable income, and economic sustainability/community impact.

To measure these impacts, two surveys were developed (see Appendix I). One survey went to participating homeowners, and a second survey was administered to the service providers that implemented the program measures and coordinated the work. To supplement the survey results and further characterize the outcomes of the Helping Home Fund, the team conducted a literature review to monetize the non-energy benefits. The results of this component of the program can be found later in the report.

NON-ENERGY BENEFITS



HEALTH

Health included measures such as the number of doctor's visits, decreased asthma symptoms and other homeowner health effects.



SAFETY

Safety included homeowners' accessibility or ability to move about their homes, as well as electrical and durability issues.



COMFORT

Comfort addressed whether occupants felt that their homes were more comfortable.



DISPOSABLE INCOME

Disposable income looked at whether the Helping Home Fund provided homeowners with additional income to spend on other necessities.



ECONOMIC SUSTAINABILITY

Economic sustainability/community impact included effects on service provider employment and home deferrals, among others.

PROGRAM SUMMARY

The Helping Home Fund served 3,516 homes with an average of two projects each (e.g., appliance replacement, heating/cooling system replacement/repair, health and safety measures). Homeowner incomes had to be below 200 percent of federal poverty guidelines to participate. The homes were assessed by local service providers serving low-

income customers to determine what measures were most appropriate. The work was then completed by either service provider-based crews or subcontractors.

The homes were reported and tracked on a project level. Table 2 shows the average dollars spent per project category.

TABLE 2 • AVERAGE DOLLARS SPENT PER PROJECT

	APPLIANCES	HEALTH & SAFETY	HEATING/COOLING REPLACEMENT/ REPAIR	WEATHERIZATION TIER 1	WEATHERIZATION TIER 2	TOTAL
TOTAL SPENT	\$1,570,742	\$2,639,385	\$12,784,018	\$100,217	\$1,018,932	\$18,113,294
NUMBER OF PROJECTS	1,676	2,731	1,878	323	488	7,096
PROJECT TOTAL	\$937	\$966	\$6,807	\$310	\$2,088	\$2,553

Through the heating/cooling system replacements and repairs, more than 1,300 homes went from non-functioning to functioning heating systems (Table 3).

TABLE 3 • PRE-RETROFIT HEATING BREAKDOWN OF HOMES RECEIVING HEATING REPLACEMENT

EXISTING FUEL TYPE	NUMBER FUNCTIONING	NUMBER NON-FUNCTIONING	TOTAL
WOOD	7	26	33
ELECTRICITY	410	1,060	1,470
KEROSENE	9	9	18
NATURAL GAS	1	14	15
OIL/LP	107	222	329
NO HEAT	0	13	13
TOTAL	534	1,344	1,878

Note. All heating types converted to heat pumps with a SEER of 14 or greater.

The majority of homes (92 percent) were single-family detached and mobile homes. The remaining were multifamily units and townhomes or condominiums (Table 4).

TABLE 4 • BREAKDOWN OF HOMES SERVED BY THE HELPING HOME FUND

	SINGLE-FAMILY DETACHED	MOBILE HOME	MULTIFAMILY (5+ UNITS)	MULTIFAMILY (2-4 UNITS)	TOWNHOME/ CONDO	TOTAL
NUMBER OF HOMES	2,362	858	196	67	33	3,516

PROGRAM SUMMARY

The subset of customers that responded to the homeowner survey provided information regarding the number of children, elderly, and individuals with disabilities or respiratory illness (Table 5). With these varying degrees of vulnerability, it can be difficult for occupants to stay in their homes. The Helping Home Fund was able to provide services to populations that may not have otherwise been reached.

TABLE 5 • HELPING HOME FUND SURVEY RESPONSE

OCCUPANT CATEGORY	NUMBER OF OCCUPANTS
UNDER THE AGE OF 18	112
OVER THE AGE OF 60	275
IDENTIFY AS DISABLED	237
IDENTIFY AS HAVING A RESPIRATORY ILLNESS	171

Note. Included data from 317 survey respondents.

The Helping Home Fund spending on each participating home ranged from \$114.32 to \$19,825.31, with an average of \$5,151. Additional funding sources were used on these homes as well, including the NCWAP, PNC Home Beautification and the NCHFA (Table 6). NCWAP funds were used

"We are no longer cold during the winter and hot in the summer."

for heating/cooling systems and weatherization, while PNC Home Beautification focused on exterior improvement, such as landscaping, painting and roofing. NCHFA funds were used for heating/cooling systems, weatherization and structural repairs. Therefore, although a house received an average of \$5,151 through the Helping Home Fund, additional work may have been performed thanks to these other funding sources.

TABLE 6 • HELPING HOME FUND LEVERAGED FUNDS (2015-2017)

SOURCE	AMOUNT LEVERAGED
NCWAP (INCLUDES DOE WAP AND LIHEAP)	\$17,321,491
PNC HOME BEAUTIFICATION	\$250,000
NCHFA	\$234,000

Note. Unable to obtain data for amount leveraged from other private funding.

To ensure that measures were installed correctly and funding was properly documented, randomly selected QC inspections were performed on completed jobs. At least 10 percent of homes with health and safety projects, appliance replacement or weatherization measures received QC, along with at least 25 percent of homes with heating/cooling system replacements and repairs.

QC inspectors conducted monitoring visits to evaluate effectiveness, safety, workmanship and compliance with program guidelines. They also addressed educational opportunities with local providers and customers during the on-site verification process. The process included a paper file review as well as an on-site visit with representation from a service provider. All measures installed with Duke Energy funds were verified to be present and compliant with work orders and materials invoiced. The quality of the workmanship was also evaluated, and QC inspection results were documented and discussed.

All QC documentation, on-site inspection details, reports and actions were uploaded into LM Captures. QC return visits were minimal, and all issues were addressed.

SURVEYS

The surveys sought to gauge the non-energy benefits and impacts of the Helping Home Fund. The full surveys, as well as responses from homeowners and service providers, can be found in Appendices I-III.

Homeowner Survey

The homeowner survey was designed to understand how the Helping Home Fund affected program occupants. Homeowners were randomly selected, and outbound calls were conducted by Duke Energy's call center for approximately one month. A total of 901 homeowners were contacted, with 317 completing the survey (a 35 percent completion rate).

The homeowners overall had a highly positive view of the Helping Home fund. Ninety-two percent of respondents reported feeling safer in their homes, and 81 percent said they have better home accessibility (e.g., getting into and out of the home). Additionally, 91 percent said the improvements from

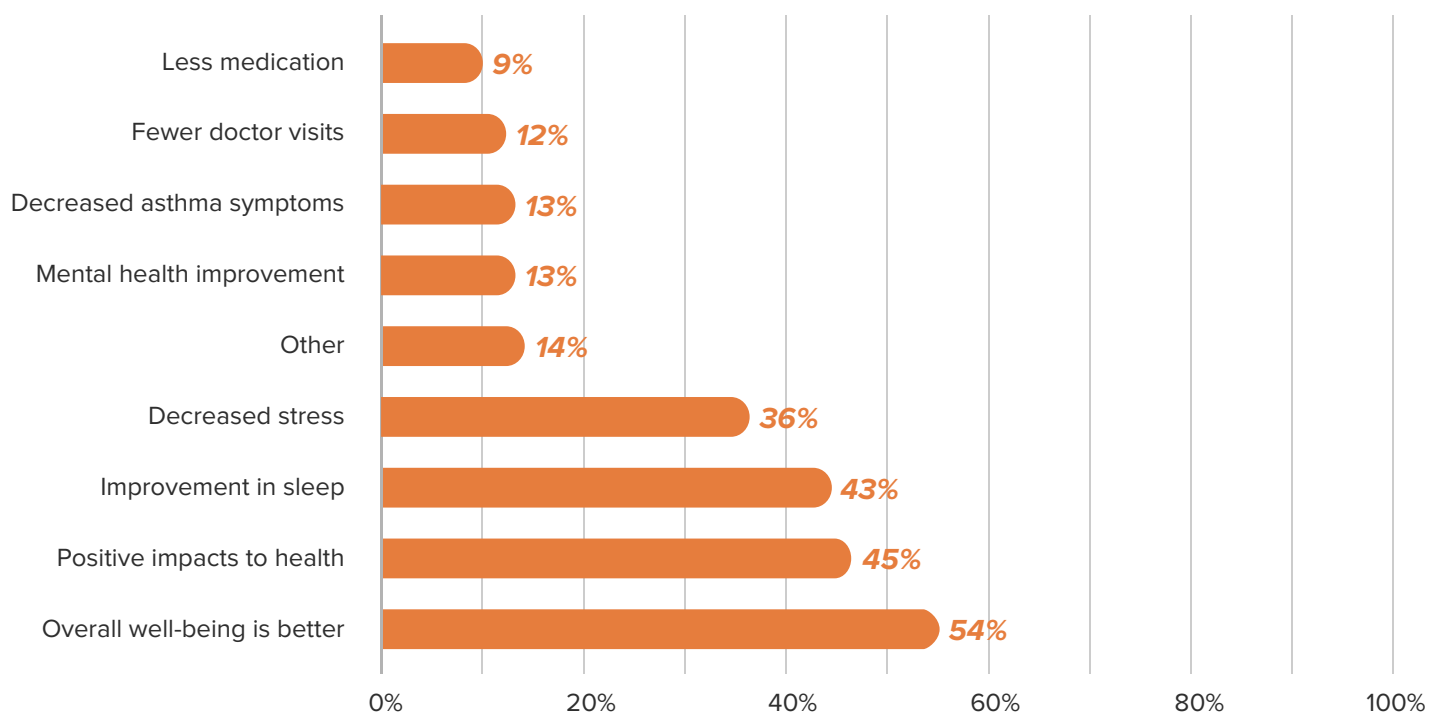
the Helping Home Fund made it possible for them to stay in their current location, and 96 percent responded that their lives have been made easier in some form. "They did a good job and it really helped me a long way," said one homeowner. "They put windows in my home so it feels warmer and I truly appreciate everything that you all did."

"My light bill has been a lot lower, so that helps me have extra money. My water bill has been lower too. It has been a lot better than in years past."

Forty-nine percent of respondents indicated that the Helping Home Fund upgrades definitely allowed them to have more money available to pay for other necessities, while an additional 29 percent said they somewhat did.

FIGURE 1 • HOMEOWNER SURVEY RESPONSES

Survey question: Have you (or any family members) noticed any positive health impacts due to the upgrades to your home? Check all that apply.



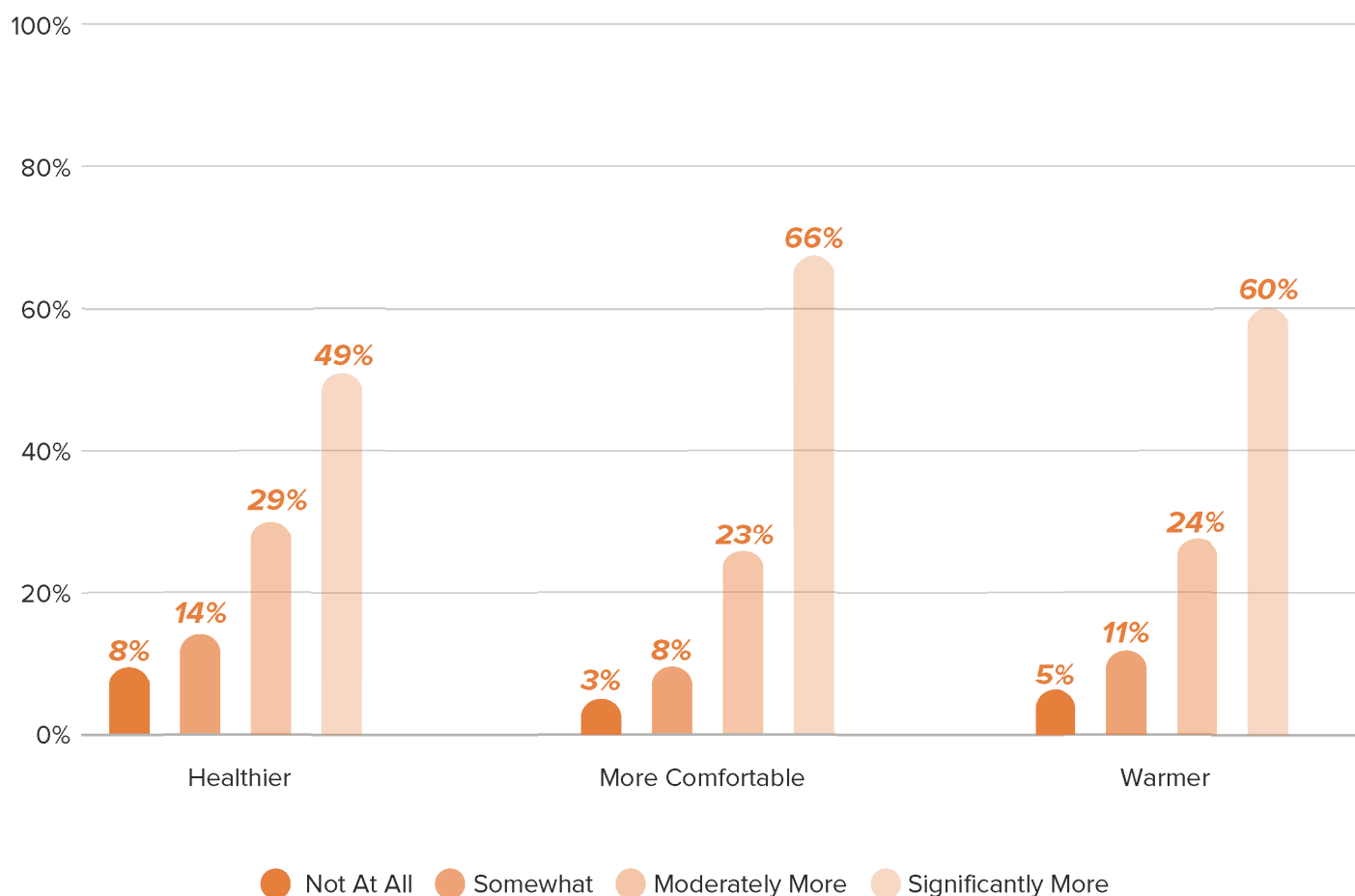
SURVEYS

Homeowners reported a number of positive health impacts for themselves and their families, including better overall well-being, sleep improvement and decreased stress (Figure 1). “If it wasn’t for Duke I

could still be in the hospital. Heat affects me very bad with my medical condition so to feel cooling has made a world of difference. I am now able to keep my body temperature down,” reported one homeowner. Likewise, homeowners said they generally feel healthier, more comfortable and warmer as a result of

FIGURE 2 • HOMEOWNER SURVEY RESPONSES

Survey question: Are you healthier / more comfortable / warmer in your home because of the improvements made?



SURVEYS

Service Provider Survey

The service provider survey was developed to assess the effects of the Helping Home Fund on participating service providers, their crews and subcontractors, and the homeowners they served. Twenty-four participating service providers were sent the survey via email, and all responded. The service providers had a very positive view of the Helping Home Fund. They applauded the staff, communication, benefits to homeowners, flexibility and reimbursement process. According to one service provider, “Overall, (the) Helping Home Fund has been both impactful for the community and rewarding for our agency to serve others in need. We would love to be considered for future opportunities.”

In particular, service providers praised the Helping Home Fund for its effect on low-income homeowners: Every provider responded that the program had a positive influence. They reported that an average of 44 percent of the homes they worked on through the Helping Home Fund would have otherwise been deferred.

Fifty-four percent of respondents felt there was a strong positive influence of the Helping Home Fund on the local community. In terms of service provider hiring, 46 percent of service providers indicated that the program affected staff employment, 4 percent said it somewhat did, and 50 percent said it did not.

The most commonly completed measures by service provider-based (i.e., agency-based) crews included insulation and air sealing, duct sealing and structural repairs to roofs, stairs, railings and windows (Table 7). Subcontractors also performed substantial work. Service providers reported that during 2015 and 2016, subcontractors were hired to help complete over 90 percent of jobs, which included electrical work, heating/cooling system repair or replacement, and plumbing (Table 7). All service providers noted that the quality of the contractor crews was either good or excellent, and most (83 percent) did not have difficulty finding contractors to work on homes. When there was difficulty, it was typically regarding electrical contractors.

“It has allowed us to serve more people in our counties that would not have gotten any service this fiscal year.”

The service providers reported receiving funding from a variety of sources in addition to the Helping Home Fund. As noted earlier, more than \$17 million was leveraged from the NCWAP, NCHFA and PNC Home Beautification, as well as other undisclosed funding sources. Service providers noted some variability and uncertainty in funding over the last five years. One

TABLE 7 • SERVICE PROVIDER SURVEY RESPONSES

Survey question: What measures did you install with an agency-based crew? What measures did you install using subcontractors? Check all that apply.

MEASURE	NUMBER OF SERVICE PROVIDERS USING AGENCY-BASED CREWS	NUMBER OF SERVICE PROVIDERS USING SUBCONTRACTORS
PLUMBING	2	19
ELECTRICAL	2	23
HEATING/COOLING REPAIR/REPLACEMENT	2	22
INSULATION/AIR SEALING	13	13
DUCT SEALING	13	11
STRUCTURAL REPAIRS	11	13

SURVEYS

service provider stated, “With the support of (the) Helping Home Fund, we were able to expand service delivery to Duke Energy Progress customers. Our agency’s primary funding source was limited for FY 2017; therefore, Helping Home Funds were leveraged

and resulted in more customers receiving home improvements to support energy use reduction and for some improved health conditions. In addition, the opportunity to complete appliance replacement might not have happened without Helping Home Funds.”

MONETIZING NON-ENERGY IMPACTS

To get a better understanding of the monetization of non-energy impacts of the Helping Home Fund, we examined prior studies and program analyses. We relied heavily on a study conducted by Tonn, Rose, Hawkins, and Conlon (2014), which monetized non-energy benefits from the DOE WAP. This study was relevant for a number of reasons, including its focus on low-income housing and the overlap in non-energy measures being explored. It also used a robust sample size, attributing results to more than 80,000 homes.

Tonn et al. (2014) used a variety of approaches to monetize the non-energy impacts. The researchers evaluated pre- and post-weatherization survey data, relied on objective cost data from existing databases where available, and then performed monetization exercises to calculate the lifetime benefit over 10 years. The researchers categorized their results into three tiers based on the reliability of the outcomes. Tier 1 estimates were the most reliable, followed by Tiers 2 and 3. Tonn et al. also considered the value of lives saved in their analyses.

We also included data from a literature review from Schweitzer and Tonn (2003). The researchers reviewed approximately 25 articles; some were reports that presented primary research from

previous weatherization programs, and others used a meta-analytic approach to examine multiple studies. This effort led to a large set of non-energy benefits, many of which were not addressed by Tonn et al. (2014). Using the available data from the prior literature, Schweitzer and Tonn selected a point estimate for individual non-energy benefits to represent an average value that could be applied to nationwide weatherization programs. In this case, monetized values were calculated using a lifetime benefit over 20 years.

Tables 8 through 12 contain the relevant non-energy benefit monetization estimates from Tonn et al. (2014) and Schweitzer and Tonn (2003). We took certain steps to err on the side of caution with the data to avoid overestimating the monetized values. For Tonn et al., we de-rated their Tier 2 estimates (by 50 percent) and Tier 3 estimates (by 75 percent). We also did not take into account the value of lives saved. For Schweitzer and Tonn, when calculating the monetized value of all non-energy impacts, we only took into account the environmental benefit associated with natural gas, the lower value, and not electricity. All estimates were converted to 2017 dollars using historical consumer price index data.

MONETIZING NON-ENERGY IMPACTS

TABLE 8 • MONETIZATION OF ECONOMIC AND SOCIAL BENEFITS

Tonn et al. (2014) and Schweitzer and Tonn (2003)

NON-ENERGY BENEFIT	MONETIZED VALUE FROM TONN ET AL. (2014) VALUES BASED ON 10-YEAR LIFETIME BENEFIT	MONETIZED VALUE FROM SCHWEITZER AND TONN (2003) VALUES BASED ON 20-YEAR LIFETIME BENEFIT
INCREASED PROPERTY VALUE		\$244.80
DIRECT AND INDIRECT EMPLOYMENT		\$1,089.36
AVOIDED UNEMPLOYMENT BENEFITS		\$159.12
NATIONAL SECURITY		\$436.56
REDUCED MOBILITY		\$378.08
LOST RENTAL		\$1.36
IMPROVED WORKPLACE PRODUCTIVITY (SLEEP)	\$512.17	
IMPROVED HOUSEHOLD PRODUCTIVITY (SLEEP)	\$375.44	
FEWER MISSED DAYS AT WORKS	\$227.62	
WATER/SEWER SAVINGS		\$368.56
REDUCED NEED FOR SHORT-TERM LOANS	\$39.99	
REDUCES TRANSACTION COSTS		\$50.32
TOTAL	\$1,155.22	\$2,728.16

TABLE 9 • MONETIZATION OF HEALTH AND SAFETY BENEFITS

Tonn et al. (2014) and Schweitzer and Tonn (2003)

NON-ENERGY BENEFIT	MONETIZED VALUE FROM TONN ET AL. (2014) VALUES BASED ON 10-YEAR LIFETIME BENEFIT	MONETIZED VALUE FROM SCHWEITZER AND TONN (2003) VALUES BASED ON 20-YEAR LIFETIME BENEFIT
CO POISONING*	\$4.19	
FEWER FIRES	\$50.04	\$92.48
FEWER ILLNESSES		\$74.80
THERMAL STRESS (COLD)	\$194.28	
THERMAL STRESS (HEAT)	\$95.79	
ASTHMA RELATED	\$2,270.09	
REDUCED NEED FOR FOOD ASSISTANCE	\$940.16	
INCREASED ABILITY TO AFFORD PRESCRIPTIONS	\$1,090.01	
REDUCED LOW-BIRTH WEIGHT BABIES FROM HEAT-OR-EAT COMPROMISE	\$55.96	
TOTAL	\$4,700.52	\$167.28

MONETIZING NON-ENERGY IMPACTS

TABLE 10 • MONETIZATION OF UTILITY SERVICE BENEFITS

Tonn et al. (2014) and Schweitzer and Tonn (2003)

NON-ENERGY BENEFIT	MONETIZED VALUE FROM TONN ET AL. (2014) VALUES BASED ON 10-YEAR LIFETIME BENEFIT	MONETIZED VALUE FROM SCHWEITZER AND TONN (2003) VALUES BASED ON 20-YEAR LIFETIME BENEFIT
CARRYING COST OF ARREARAGES		\$77.53
BAD DEBT WRITE-OFF		\$121.04
FEWER SHUTOFFS AND RECONNECTIONS FOR DELINQUENCY		\$10.88
AVOIDED RATE SUBSIDIES		\$28.56
INSURANCE SAVINGS		\$1.36
REDUCED GAS SERVICE EMERGENCY CALLS		\$137.36
FEWER NOTICES AND CUSTOMER CALLS		\$8.16
TRANSMISSION AND DISTRIBUTION LOSS REDUCTION		\$65.28
AVOIDED SHUTOFFS AND RECONNECTIONS		\$23.12
TOTAL	\$0	\$473.29

TABLE 11 • MONETIZATION OF ENVIRONMENTAL BENEFITS

Tonn et al. (2014) and Schweitzer and Tonn (2003)

NON-ENERGY BENEFIT	MONETIZED VALUE FROM TONN ET AL. (2014) VALUES BASED ON 10-YEAR LIFETIME BENEFIT	MONETIZED VALUE FROM SCHWEITZER AND TONN (2003) VALUES BASED ON 20-YEAR LIFETIME BENEFIT
AIR EMISSIONS - ELECTRICITY		\$1,324.64
AIR EMISSIONS - NATURAL GAS		\$435.20
OTHER BENEFITS		\$745.64
TOTAL	\$0	\$2,505.48

TABLE 12 • MONETIZATION OF ALL NON-ENERGY BENEFITS

Tonn et al. (2014) and Schweitzer and Tonn (2003)

NON-ENERGY BENEFIT	MONETIZED VALUE FROM TONN ET AL. (2014) VALUES BASED ON 10-YEAR LIFETIME BENEFIT	MONETIZED VALUE FROM SCHWEITZER AND TONN (2003) VALUES BASED ON 20-YEAR LIFETIME BENEFIT
ALL	\$5,856	\$4,550

Note. The total monetized value from Schweitzer and Tonn (2003) excludes air emissions associated with electricity.

MONETIZING NON-ENERGY IMPACTS

The two studies reveal that weatherization and other energy efficiency upgrades can produce a wealth of non-energy benefits with values in the thousands of dollars. At the same time, it is worth noting the lack of overlap in the impacts that Tonn et al. (2014) and Schweitzer and Tonn (2003) examined. Therefore, the overall value of non-energy benefits may be even higher than those reported here.

Given the similarities in the housing stock, occupants and measures installed in the Tonn et al. (2014) and Schweitzer and Tonn (2003) studies when compared to the Helping Home Fund, it is possible to assume that participants in the Helping Home Fund received a similar level of non-energy benefits. Even with our conservative estimates, the non-energy benefits associated with the Helping Home Fund, then, could approach an average of \$10,000 per home (the sum of the total non-energy benefits from the two studies). Indeed, the homeowner survey results confirm that those participating in the program did receive non-energy benefits, from health improvements to enhanced comfort and increased ability to stay in their homes. These benefits can be

particularly important for occupants who are children, elderly, or have disabilities, respiratory illness or asthma.

The Helping Home Fund was not designed to reduce overall energy use but rather to provide other benefits to low-income customers, such as improved health, comfort and safety. For example, approximately 35 percent of the homes had non-functioning heating systems and the program was able to provide new systems to these customers. The program also provided new washers, dryers and room air conditioning units, since other programs typically did not address this. However, because the program highly leveraged the NCWAP, we can assume that these customers would also receive energy benefits. Based on the literature review, DOE WAP achieves average lifetime energy savings of \$4,890 per home (Tonn, Carroll et al. 2014).

Table 13 summarizes the average costs and benefits for participating homes based on total invested funds and estimated benefits from the literature review.

TABLE 13 • SUMMARY OF COSTS AND BENEFITS FOR HELPING HOME FUND

	AVERAGE PRESENT VALUE PER HOME	PRESENT VALUE FOR TOTAL HOMES
ENERGY BENEFITS (COST SAVINGS) ¹	\$5,115.33	\$17,985,500
NON-ENERGY BENEFITS ²	\$10,312.83	\$36,259,910
ECONOMIC AND SOCIAL	\$3,883.38	\$13,653,964
HEALTH AND SAFETY ³	\$4,775.32	\$16,790,025
UTILITY SERVICE	\$473.29	\$1,664,088
ENVIRONMENTAL ⁴	\$1,180.84	\$4,151,833
TOTAL BENEFITS	\$15,428.16	\$54,245,410
TOTAL COSTS	\$10,124.37	\$35,597,294
HELPING HOME FUNDS	\$5,151.68	\$18,113,294
LEVERAGED FUNDS	\$4,972.69	\$17,484,000







1. Value based on Tonn, Carroll et al. (2014)

2. Value (and subcategories below) based on summed benefits of Tonn et al. (2014) and Schweitzer and Tonn (2003)

3. Uses the lower monetized estimate of fewer fires, from Tonn et al. (2014)

4. Excludes air emissions associated with electricity from Schweitzer and Tonn (2003)

CHALLENGES AND LESSONS LEARNED

- 
 - The NCCAA was the appropriate choice for administering these funds, forming a valuable relationship with Duke Energy. The NCCAA provided access to a network of service providers who were already intricately involved in low-income communities across the state. These service providers were able to quickly access homeowners who met the requirements for participation in the Helping Home Fund. The NCCAA also saw value in being involved with individual agencies throughout the implementation of the program, getting to know their particular challenges and strengths. With this experience and data, the NCCAA is able to provide recommendations to the NCWAP to improve overall performance.
- 
 - The NCCAA collaborated with Lockheed Martin to assist with the administrative duties of the program. Lockheed Martin is a strong partner, providing invaluable recommendations for program implementation, QC and data documentation. In addition, Lockheed Martin oversaw key communication and training with service providers that kept the program running smoothly. The ability to adapt and be flexible with service providers, who had varying degrees of experience with implementing programs, was essential.
- 
 - Funding levels for individual measures (health and safety - \$800 and appliances - \$800) were initially too low, resulting in huge requests for exceptions. As a result of these requests, funding for health and safety was increased to \$3,000 per home and appliances to \$2,000 per home in 2016.
- 
 - Funding allocation for administrative costs (5 percent) was insufficient for some of the service providers; however, this could not be changed due to the regulatory filing.
- 
 - Delays in obtaining contracts and funding between the service providers and the NCWAP caused issues with completing projects in a timely manner.
- 
 - While the data collection process was thorough, some data was not collected during this initial spending cycle but was later learned through the customer surveys. In the future, the Helping Home Fund may consider including the following in data collection:
 - **Number of occupants by age group (to capture number of elderly/children)**
 - **Number of occupants with asthma or disabilities**
 - **Tracking of leveraged funds per home**
 - **Tracking of when measures are installed**
 - **Pre-retrofit survey of homeowners**
- 
 - Now that the service providers have been oriented and trained to the program, it should be less costly for them to support the program.
- 
 - Based on some of the homeowner surveys, it was determined that they did not realize Duke Energy had funded some of their repairs. While a brochure was developed and available for the agencies to provide homeowners, its use may have dwindled over time. There is an opportunity for better marketing of the program to both homeowners and local communities.
- 
 - There were mixed reviews of LM Captures, which is understandable when working with a network of providers with varying degrees of experience with technology and availability of local resources. Role-based dashboard reports provided updates for status and planning. The NCCAA and Lockheed Martin worked closely with service providers to provide one-on-one customer service and support during program launch

CHALLENGES AND LESSONS LEARNED

and throughout the program. Feedback from service providers has resulted in ongoing updates to LM Captures, including easily identified required fields, less data entry on the home page, additional options in drop-down selections and revisions to heating/cooling data entry fields.



Programs such as the Helping Home Fund are not designed to pass energy efficiency tests. Therefore, the utility only receives funds in special cases, such as during rate cases or mergers. However, evaluating non-energy benefits in addition to traditional energy benefits can help determine the true cost-effectiveness of these programs, and allow the utility to capture the benefits such a program can offer.



Weatherization service providers are limited in the funds they can spend on health and safety measures, causing many homes to be deferred each year. Working closely with service providers ensured that they used the Helping Home Fund monies in the anticipated manner. This funding source, along with others such as the NCHFA's

Single Family Rehab program, works well with WAP so that homes can be retrofit, and homeowners benefit from access to multiple programs that can address different needs. As one example, the Macon County Housing Department "was able to use the monies from the Helping Home Fund in conjunction with other programs such as the Urgent Repair Program, LIHEAP Heating and Air Repair and Replacement Program (HARRP), Single Family Rehab Program and the Weatherization Program."



Leveraging other programs, while a benefit, was also a challenge for some service providers. It took time for providers to learn how to effectively use different funding sources on the same homes. To help them get up to speed, the Helping Home Fund used multiple methods to train service providers, including webinars, on-site training and ongoing mentoring. Overall, they found that one-on-one training was more effective than group training. The QC field visits were an additional training opportunity for service providers.

NEXT STEPS

The Helping Home Fund recently received an additional \$2.5 million when Duke Energy merged with Piedmont Natural Gas. This money will go toward a similar program and will be used in the following ways: \$800 for heating/cooling repair and/or maintenance, \$3,000 for health and safety, and \$2,000 for appliance replacement (refrigerators, washers, dryers, room air conditioners and dehumidifiers). Duke Energy decided to reduce the

allocation toward heating/cooling systems due to the limited funding, and to allow the funds to be available over a 12-18 month period.

With the success of the Helping Home Fund, the team is sharing its experience with stakeholders around the country so that others may learn from it and build upon it.

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ABBREVIATIONS AND ACRONYMS

DEC	Duke Energy Carolinas
DEP	Duke Energy Progress
DOE	Department of Energy
HHF	Helping Home Fund
HSPF	Heating Seasonal Performance Factor
LIHEAP	Low Income Home Energy Assistance Program
LM Captures	Database developed and maintained by Lockheed Martin
kWh	Kilowatt-hours
LP	Liquid Propane
NCCAA	North Carolina Community Action Association
NCHFA	North Carolina Housing Finance Agency
NCWAP	North Carolina (State) Weatherization Assistance Program
PNC Home Beautification	Fund offered by PNC bank
QA	Quality Assurance
QC	Quality Control
SEER	Seasonal Energy Efficiency Ratio
WAP	Weatherization Assistance Program

APPENDIX I • SURVEYS

HOMEOWNER SURVEY

Intro Section: (Provide context and explain the value of participating in the survey)

Hello, my name is ____ and I am calling on behalf Duke Energy. I'm calling today because your household participated in a program to receive free home improvements through the XXX Weatherization Agency. As part of this program, a contractor would have come into your home and installed free energy saving products and made home improvements. We would like to take just a few minutes to ask you a few questions.

Are you the person in your household who is most familiar with the improvements that were made to your home?

- ☐ Yes ☐ Don't know
☐ No ☐ Refused

We're speaking with customers who have participated in the program to complete a short survey to learn about their experience and satisfaction with the program. This is not a sales call, and all of your responses will be kept confidential.

Homeowner questions

1. How many children under the age of 18 currently live in the home?
2. How many people over the age of 60 currently live in the home?
3. How many residents in your household identify as disabled?
4. How many residents in your household identify as having a respiratory illness (e.g., asthma)?
5. Can you recall any of the weatherization improvements that were specifically made to your home?
6. Are you aware that the Duke Energy Helping Home Funds were used in your home?
7. If yes, do you know which improvements were paid for by HHF?
- 8-10. Are you healthier / more comfortable / warmer in your home because of the improvements made?
☐ Not at all ☐ Moderately more
☐ Somewhat ☐ Significantly more
11. Have the upgrades to your home allowed you to have more money available to pay for other necessities?
☐ Definitely ☐ Somewhat ☐ No
12. Have you (or any family members) noticed any positive health impacts due to the upgrades to your home? Check all that apply.
☐ Positive impacts to health, Less doc visits, overall well-being is better, mental health improvement, improvement in sleep, decreased stress, less medication, decreased asthma symptoms, Other (fill in the blank)
13. Have the improvements made on your house made it possible for you to remain at home (as opposed to needing to move to another location)?
☐ Yes ☐ No
14. Has your life been made easier through these upgrades?
☐ Yes ☐ No
15. Do you have better accessibility or access to your home because of these upgrades (e.g., ability to get in and out of your home)?
☐ Yes ☐ No
16. Do you feel safer in your home (e.g., from injury due to durability issues)?
☐ Yes ☐ No ☐ Somewhat
 (If yes or somewhat, please describe)
17. Any other comments regarding Duke Energy's Helping Home Fund you would like to share?

That is all the questions I have today. Thank you so much for your time and have a great day.

APPENDIX I • SURVEYS

Service Provider Survey

Duke Energy launched the Helping Home Fund in North Carolina in January 2015. This fund was designed to assist low-income customers with managing their energy costs while also addressing health and safety. As the first round of funding comes to a close, we are reaching out to participating Weatherization Agencies to hear your feedback. We want to learn about your experience with the program, as well as gather data on how the program impacted local communities. We sincerely appreciate you taking the time to provide responses to the following questions.

Service provider questions

1. Contact Info:
 - ☐ Name
 - ☐ Agency
2. Has the Helping Home Fund had a positive impact on the low-income homeowners that you serve?
 - ☐ Yes, Somewhat, No
3. Have you noticed any positive effects on the local community (beyond the occupants of the homes) from your participation in the Helping Home Program?
 - ☐ Yes, Somewhat, No
4. What % of homes were you able to work on that would have been deferred because of the Helping Home Fund?
5. Did the Helping Home Program have an impact on how many staff your agency employed during the program years?
 - ☐ Yes, Somewhat, No
6. What types of funding does your agency receive on an annual basis? Check all that apply.
 - ☐ LIHEAP
 - ☐ NCHFA
 - ☐ DOE Weatherization
 - ☐ Utility Funds
 - ☐ PNC Beautification Funding
 - ☐ Private Funds
 - ☐ Other (_____)
7. Has that funding varied over the last five years? If yes, please explain to what degree it has varied.
8. What measures did you install with an agency-based crew?
 - ☐ Plumbing
 - ☐ Electrical
 - ☐ HVAC Repair or Replacement
 - ☐ Insulation/Air Sealing
 - ☐ Duct Sealing
 - ☐ Structural Repairs (Roof, Stairs, Railing, Windows)
9. Did the Helping Home Fund impact your ability to retain an agency-based work crew?
 - ☐ Yes, Somewhat, No
10. What measures did you install using subcontractors?
 - ☐ Plumbing
 - ☐ Electrical
 - ☐ HVAC Repair or Replacement
 - ☐ Insulation/Air Sealing
 - ☐ Duct Sealing
 - ☐ Structural Repairs (Roof, Stairs, Railing, Windows)
11. How was the overall quality of contractor crews?
 - ☐ Excellent / Good / Fair / Poor (If fair or poor, please explain what was lacking)
12. Did your agency have difficulty finding local contractors to work on homes?
 - ☐ Yes, Somewhat, No
13. If yes, any suggestions of what could help remedy this situation?
14. If yes, how did this affect what work was completed?

APPENDIX I • SURVEYS

15. If yes, what type of contractors did you having trouble finding?
 - Plumbing
 - Electrical
 - HVAC Repair or Replacement
 - Insulation/Air Sealing
 - Duct Sealing
 - Structural Repairs (Roof, Stairs, Railing, Windows)
16. What percentage of jobs did you hire subcontractors to help you complete the work in 2015 and 2016?
17. If the Helping Home Fund was to be continued as a program, what improvements / changes would you suggest?
18. What worked well about the program?
19. Were there any houses or families that stood out with regard to the impact you observed from participation in the program?
20. Is there anything you want to tell us about your experience with this program?
21. Can we contact you with additional questions?
If yes, Name, email address, phone number.

APPENDIX II • HOMEOWNER RESPONSES

I really like the program. Years before I didn't know about different things to make my home efficient. I have told people about it too. I feel like Duke Energy really tried to help people. Thank you so much.

I am so amazed by all Blue Ridge took care of for me with my new ac, the insulation, the moisture barrier the sensor for carbon monoxide and the replacing of my duct work. I am also happy to learn that Duke Energy had a hand in this too. Kudos to Duke Energy. Keep doing what you all doing. I have a testimony about everything that was done for me. I am so grateful. Mr. Dale and his crew were amazing. They did an outstanding job. They gave me a sense of everything going to be alright. The inspector was also great and offered his number to if anything should go wrong with my unit to call him. They did everything they said and much much more. This program is great for older disabled people like me. Anytime you need live customer data or feedback, please call me because I have nothing but good things to say about Blue Ridge and Duke Energy.

I just want to say everybody was nice and good to me. I thank you all. I love my new ac unit. I didn't know Duke Energy was responsible for doing that. I don't have to worry about that being done anymore. This is a good thing to have and I am thankful.

It was very helpful and nice to know assistance is out there for people who may be in a struggle. This is wonderful program also for older customers or those with health issues. I was more concerned with the efficiency of my home and the insulation has been great since added. I'm not worried about how often my units cycles on and off.

Everybody was so kind that came out. Very polite and were courteous to take off their shoes and not track dirt into the home. They also cleaned up after

themselves. Very thoughtful. I am thankful for the good Lord to make something like this available to me. The agency also helped replace the faucets and I got light bulbs. I am very thankful for this program. I'm not sure if anything can be done or if someone can direct me, but I am in need of windows. The windows I have now are terrible. I'm using duct tape and plastic to close them shut. I would just love if someone could help guide me to a agency or a program that can help me with my windows.

I thank God for the program. Really overwhelmed with joy and happiness that there was such a program available to help me.

Appreciate this program so much. Helped me because I would have had to find another job to have to done some of the things that were done, especially the new heat pump that was installed. I was blessed with this program and to be able to qualify. I am thankful. It didn't push me into anymore debt and although I am on a fixed income at 73 yrs. old I can still pay my bills and not scraping to make ends meet.

It's the best thing that happened to me, I couldn't afford to have these structure repairs done.... wonderful thing to happen to me it's highly blessing that fell on me!!! the best thing that could have happened for me! So grateful and thankful

All of them were very nice people. I am definitely appreciative of having an electrical heating system in my house. I feel safer now since I don't have to mess with the kerosene heating and worrying about it tipping over or not changing the filter or the possibility o hit burning down more house.

APPENDIX II • HOMEOWNER RESPONSES

Where the back porch was they built steps with a handrail... I was very appreciative, I needed the work done and had no idea how I was going to do it, I was so happy to qualify for the program.... it was a blessing.... I said my prayers and this happened... I really appreciate it....

I am so grateful.....when the contractors came out to my house - I cried.... I was so thankful..... I just want to thank everyone at duke energy from the bottom of my heart!! I don't have to worry about spinning my air unit by hand....it would freeze up and we would have to cut it off by the breakers.... old a/c unit finally stopped running... I had everyone in my family send a letter to the agency thanking them for everything....I send them Christmas cards, send them thank you notes.....

I thought my light bill would come down....but it hasn't.... put insulation in the roof, I appreciate all of the improvements that were done..... thankful for the help.... did a lot of work....

I appreciate the program and I would recommend it to anyone. You guys did such a wonderful job, from the bottom of my heart.

I'm so grateful...I. would like to say thank you from the bottom of my heart... it was getting to the crisis mode where I thought I would have to move..

They put insulation in attic, fixed heat ducts so heat would go down... it's a good thing to help people, it's a good fund if people don't have the income to put stuff in...it's good.

The contractors that were used were excellent, the approach, communication, they were a great group.

I would like to say thank you for the program, its been a life saver...

I think this is a great program. It helped me and my family. I hope more funding becomes available to help other families.

I must say that everyone who came out I was well pleased with. They were all kind mannered and promised to be here and was here at the time given. I am very happy with all things done and happy for my new ac unit. The guy who installed my new system explained everything to me very well.

The crew was great. I hope Duke will be about to continue this service. It has a lot of benefits to the community and I appreciate being able to have had the opportunity. I was out of work during the time my new system was installed so I am thankful. This program is one of the Best programs Duke offers and is an excellent service.

I am surprised that they were able to install my new heat and cool unit in my home because I have an old mill house so I am very grateful that they managed to install it. They did a great job. Everyone was nice and cleaned up after themselves. The inspectors were nice too. I wish I had money to contribute to this fund to help others in need because it is hard when you need improvements and don't have the money or means to pay for it. I am thankful Duke has a program like this and the weatherization agencies.

APPENDIX II • HOMEOWNER RESPONSES

I just think is Godsend. It is such a wonderful program for senior citizens, someone who is disabled that cannot afford to help themselves.

I'm on equalized payment and my bill went from 193 to 120 dollars per month... that extra savings can pay for another bill... I was flabbergasted when I qualified for the program, my heat pump was replaced, washing machine is great, (this machine wrings out clothes so less drying) replaced every light bulb... they were fabulous, couldn't believe it... I work at a non-profit organization, it was unreal, it I hadn't been worked there i wouldn't have known about the program.

Power bill has gone from 500 to 200 dollars per month. We were using space heaters to heat the home & a window unit to cool the home. I'm 100% satisfied that they helped me as much as they did!

My mother doesn't have to worry about buying oil this winter or using a space heater, which is dangerous. Many people do not know about this program and its because of the line of work I am in to why I found out. This has been a life saver. I do not live with my mother but my brother and I were there when everything was being done and I don't know what we would have done without this program because financially we don't have the money to have made these sort of upgrades. My mother is elderly and it gives her now a sense of being safer, warmer and saving money. She can also stay in her own home and not in a living facility. This program saved our lives and we thank you so much.

Having the new windows make me feel safer. Overall I feel better and I am grateful and thank you all.

It was just wonderful and I thank and appreciate it. It's fantastic that Duke can set aside funds to help people like myself that is on a fixed income and elderly. I am a widower and I can't thank you all enough for my new air conditioning system. I am very appreciative of everything and Duke.

The program has done a lot for a lot of people in the neighborhood. I hope that the program continues and help others. My light bill is very very good. I really enjoy the way it is. I hope they decide to do more of this program, especially for senior people who can't afford it. It really came in handy.

It's a great program to help people. I always worked and made it on my own and I have been very independent and then had a lot of medical issues. I have been in a pretty bad shape, and my stuff went out, so I was glad for that program.

I think is a great program for people who really need it. Sometimes is hard to make meets end, so anything that you can do to lower the electric bill, so I think you should do more of these programs.

I really want to thank you for having the program. It helped very much. I am in a lot of medications, so this helped me a lot. I have told people that Duke Energy helped me a lot and that's why I feel better. My bill also decreased and is very nice now.

The whole process was painless. I couldn't have asked for a better set of people. Mark and David were exception. They were great. Neat and courteous. I was so appreciative I cooked them a little something to say thanks.

APPENDIX II • HOMEOWNER RESPONSES

I never knew that Duke Energy was involved. The people that worked on the house they were some of the best people ever. The people that were hired were great people.

I think the program is amazing, for citizens who pay taxes like myself. These improvements allow me to tell others about this program. It's great. I am truly blessed.

They did so much!!!! I think it's a real good program who need assistance.. when winter comes I'll really get the benefits.... appreciate the program, a really good program.... the people who administrated the program did a great job! They let me know all of the information.

I just think the program is wonderful. They did so much for us. Me and my sister live here and we are getting out there in age, fixed income, and we couldn't have done any of this without you guys. We don't have to worry about things breaking down. We know that we will be able to stay here for a long time. It is just wonderful!

They all did a fantastic job with the upgrades. After they finished my evaluation my refrigerator went out 4 days later, and it wasn't included.... thank the lord for that program and I was eligible for it. it's a great thing you do for people who can't afford those things, i don't know what i would have done... all the guys were very nice and friendly and everything I'm glad to be a duke energy customer.

Thanks a lot, if it weren't for the upgrades I don't know what me and my mom would do, keep

the program going... most definitely... if you can help anybody else like you've helped us, please continue. It was amazing for us!! It was an amazing experience.. the people that did the work were very considerate of me and my home...

I think Duke Energy is good, everything is great, all the upgrades, I couldn't ask for anything any better thanks to duke power, what would we do without them.

Door is a lot more secure, windows are more secure.... previously on windy days you could actually hear the wind blowing inside, it was so bad the wind would move the blinds... there was a lack of sealing previously... I'm glad to know Duke Energy was behind a lot of it.... this place really needed it (public housing).

I think it is a good program for people that are on social security and can't afford big bills. Everyone who came out was really nice and I thank Duke Energy for helping me.

The little boys that the installed the equipment were really nice, they did a good job.. Ms. Cannon wanted to make sure everyone got involved with the installation got an A+ After my a/c was installed I told my girls "I believe I've went to heaven when I woke up."

It has made a world of difference... wasn't aware Duke Energy HHF was involved.. couldn't believe I was eligible for all this equipment... I want to thank Duke Energy for being a company that has helped a consumer, feels very very good!! Absolutely remarkable...

APPENDIX II • HOMEOWNER RESPONSES

Don't have to use plug in heat, feel safer now.... not worried about fires as much, fire/gas alerts system make customer feel safer... Duke Energy has done a wonderful job to help the seniors, a lot of customers can't afford a heating/cooling system, we didn't have the money to put in heating/cooling system. The people who installed the system did a good job, cleaned up before they left.... appreciate washer/dryer, appreciate that..... customer really appreciates everything to the highest..... they removed a lot of stuff from the bottom of the house and they had it all removed... can't complain about any of the services.

Feel safer in home because old heaters were bought from Walmart and they weren't as safe. The HHF has been a blessing, it has made our lives so much easier... Hopefully others can benefit from this program... our electric bills have been cut in 1/2...

I appreciate everything that was done. I appreciate it so much that I wrote thank you letters to everyone with Community Action Opportunities. I am very thankful. I used to burn oil and I didn't have to spend the money this year. They also upgraded my wiring to get the new heat pump in. They took good care in what they did and with me.

I am glad that Duke Energy had the funds to help and assist the disabled. It helped me tremendously. It has helped my bill a lot. It has decreased my bill for about \$100 or so.

I am just glad that it was available and we qualified for it, for our HVAC. It was really expensive for us because of kerosene.

I am so thankful for everything that was done for me. Everyone who came out from each of the companies were very professional. Even the Inspectors were nice and not snobs. They assured me that all the electrical work was done correctly. They even installed a smoke and gas detector alarm.

I appreciate the new appliances, because they are more energy efficient. I know down the line they will help me with the electric bill. I greatly appreciate it.

Customer says he and his mother are on disability and it was blessing, and they really appreciated what Duke has done for them.

My personal opinion, I think this program is a blessing. I think that DE is one of the most wonderful companies to help people who are disabled. My husband passed away last year from cancer and this program helped me so much. I am so thankful.

I am greatly thankful for Duke Energy and this type of program. I was in shocked that I could apply and actually got accepted. They replaced my washer and dryer and my ac unit. They also gave me a refrigerator. My house was hot and moldy previous to the improvements and had deteriorated and had critters. I feel healthier overall. If it wasn't for Duke I could still be in the hospital. Heat affects me very bad with my medical condition so to feel cooling has made a world of difference. I am now able to keep my body temperature down. This is a mobile home so it isn't very efficient to begin with. Thank Duke and the weatherization Action Pathways for everything.

Everyone that was sent out was professional from start to finish. From the first inspector to the final inspection inspector. This was very convenient and mindful and everyone was friendly. Definitely keep

APPENDIX II • HOMEOWNER RESPONSES

this type of system around. I hope it can extend across the nation to others in need. I recommend it. Sad to hear that our fearless leader is trying to take programs away like this but I am grateful that it is available. Thank you so much for taking the time out to call to ask about my experience.

I would tell anyone that has the opportunity to do this to please do it immediately. Be careful who you said yes to, but if you know if it is a program that Duke Energy is responsible for, then they will take care of you.

I can breathe a lot better. You all did such a good job. Thank you all for doing this. I am so pleased. Everyone was so nice and the entire thing was enjoyable.

Keep program up. Elderly people need it. After you work all your life then to end up on a fixed income it's hard when things need to be fixed. Sometimes you have to choose to do without meds or maybe food depending on how bad it gets. I thank you all for doing this and keep it up.

Thankful for heat pump and thankful overall for everything that was done and is coming out to her home. During the winter customer feels a lot warmer and during the summer hot months she is a lot cooler. She has noticed breathing better although she doesn't have an issue breather. The quality of the air is better. In the past she has used fans but now feels better overall during the hot days.

If it wasn't for Duke Energy I don't know where I would have been this winter. With previously having to use a wood burner for heat which caused my sons breathing issues I am thank you to Duke for installing a new heat and cool system. I am tickled to death and so pleased of all the work that was done. I am so happy that Duke cares about people who need help and from the bottom of my heart I am thankful.

I was not aware Duke Energy money was used towards the improvements in my home so knowing this is great and I appreciate you all so much. I also like the tips you send out on think that can be done in the home to save money like hanging the clothes to dry instead of using the dryer.

I sure appreciate the things that were done because it helped to better the household. To have a better heating and cooling unit helped a greater deal. They also did the cracks and the bathrooms which was good too.

I have nothing negative to say about my experience. The air conditioning company (Mr. Richard) was awesome. Make note that Mr. Richard explained that this was one of the biggest jobs they have done. It was starting from scratch. No insulation in the attic, no central heat or cool. They also added vent in bathroom and a main breaker. I am so very grateful and thankful and happy to recommend this is anyone I know. I had to wait 2-3 years for this and I am thankful my home had all these improvements made. Tell the program manager that this was exceptional for Duke and the other workers to do.

They did a good job and it really helped me a long way. They put windows in my home so it feels warmer and I truly appreciate everything that you all did. One person in here asthma is as bad and overall we feel good and is comfortable. Thank you so much.

APPENDIX III • SERVICE PROVIDER RESPONSES

WARM was able to assist so many families with these funds. We are so grateful, and wish there were more funds to continue to help so many more families that are in need.

We worked very hard within a short time frame to spend the original allocation, plus the additional funds we requested and received. In about a two year period, we installed over 175 heating systems, a great many appliances, and health & safety and weatherization measures. In spite of all that was accomplished, the need exists for that much more to be done.

It has been an great program for all our eligible clients.

We look forward to continuing to work with Duke, it has been an outstanding opportunity for our agency as well as the customers that have been touched by this program. It has given us the opportunity to bundle services with other agencies to serve customers and provide additional measures in the home.

This was a great program, but the need is still great (10x).

The program support team was very helpful in assisting us from the start to finish and we were able to leverage the funding to provide needed services to the low-income folks CADA serves.

This was one of the best programs we have administered to assist homeowners with appliances. (2x).

The staff at NCCAA and the Martin group were very helpful and easy to work with. The requests for exceptions were processed quickly as were agency reimbursements. This program was a win-win for all involved.

Overall, HHF has been both impactful for the community and rewarding for our agency to serve others in need. We would love to be considered for future opportunities.

Joel Groce with NCCAA did an outstanding job administering the dollars.

This has been a great program. The Duke HHF staff were great and very knowledgeable. Payments were also processed timely.

The HHF program has helped offset many program expenses and has allowed us to continue working longer through the year until the new contract is completed and/or funding is released.

CONTRIBUTORS

Advanced Energy

Kelsy Green

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Duke Energy

Casey Fields

Lorrie Maggio

Lockheed Martin

Deborah Hill

North Carolina Community Action Association

Joel Groce

Sharon Goodson



advanced
energy

Testimonials

██████████ is a Columbus County resident that applied for weatherization due to the high cost of heating and cooling her home. ██████████ qualified for the HVAC replacement program through Duke and was able to get an energy efficient heat pump installed. ██████████ stated, "I don't have to seek assistance anymore with filling my tank to heat my home. I am very pleased with all of my services."



Old Unit



New Energy Efficient Unit



Non-Functioning CO Detector



New CO Detector



Old Thermostat



New Energy Efficient Thermostat

Helping Homes Fund gives Hickory woman her first heating and AC system ...

By KJ HIRAMOTO khiramoto@hickoryrecord.com

Sep 9, 2016



Janet Lutz of Brookford adjusts her thermostat to her new heating and cooling system from Duke Energy's Helping Home Fund.



Janet Lutz of Brookford has already started covering her new refrigerator from Duke Energy's Heling Home Fund with photos of her grandchildren.

HICKORY – The thermostat at Janet Lutz’s house in Hickory has remained at exactly 72 degrees Fahrenheit throughout the summer. While Lutz insisted she is comfortable with the temperature setting in spite of some of the hottest and most humid days during previous summer, it was also due in part to her being overwhelmed by the technology.

“I’m scared to touch the buttons,” Lutz said jokingly. “But it feels great around the house. ... My sister also told me to keep the fans in the living room going to keep the air flowing.”

Before having the thermostat installed in her house, Lutz had never owned a heating and air conditioning system.

“I’ve always had my wood stove for over 40 years,” Lutz said. “I made my boys go out buy a loaf of wood, stack a pile outside, bring some inside the kitchen and we’d heat it with a stove.”

Thanks to the collaborative efforts between Duke Energy and Blue Ridge Community Action (BRCA), Lutz’s days of making her grandsons gather wood to generate heat around the house is over.

Lutz was among the families selected by BRCA as one of the recipients of Duke Energy’s Helping Home Fund.

Helping Home Fund is a program that offers free assistance for income-qualified Duke Energy customers with up to \$10,000 in energy efficiency upgrades. After receiving a complete home energy assessment, they also receive assistance and counseling to help the families save on their future energy bills.

BRCA’s role is to administer the home improvements for the chosen Duke Energy customers as soon as the non-profit organization receives the allocations from Helping Home Funds. They identify the clients who apply for the program, send out contracted auditors to test the home then the auditors send the reports back to BRCA, which then follows up with a select group of clients based on their eligibility scores.

BRCA Energy Director Shawna Hanes said the program operates in a team effort with all the contracted partners and Duke Energy all playing their own roles.

“We have qualified contractual partners that we had carefully selected which we are glad to have with us,” Hanes said. “And we would not have been able to install the system (in Lutz’s home) if it weren’t for the funding received by Duke Energy.”

In addition to assessment and counseling, chosen families like Lutz’s receive services from the program such as health and safety repairs and installation of home ventilation systems.

And for Lutz’s case, she received repairs on her home windows and a refrigerator as additional services provided by the program.

Lutz said ever since the installations for the series of home improvements were completed several months ago, she had been pleasantly surprised to see her house is a lot more energy efficient, evident by the noticeable difference in her monthly Duke Energy bills.

“When we used the wood around the house, it went around \$200 a month,” Lutz said. “Now it’s between \$120 to \$140. ... Now I can spend the extra money on the boys’ school supplies and (school) uniforms.”

Lutz said the new heating system in the house has enabled her to give her two grandsons -- Daniel, 15, and Nick, 11 -- extra time in the evenings by not having to make them go out to gather wood for the stove. But as a result, she did add more chores around the house for the boys.

"They're not going to sit around," Lutz said jokingly. "Daniel likes to cook so I have him prepare the main dishes, and Nick likes to bake pastries and I get him to organize the Bible shelves."

All jokes aside, Lutz said the series of home improvements and installations have helped the family immensely, especially for her two grandsons. They've struggled with asthma when their house was in its previous conditions.

"They're nowhere near as affected by it now," Lutz said. "I couldn't be more thankful for Helping Home Fund."

Hanes said seeing the families experience improvements to not only their home utility systems, but also to the quality of their lives makes her job that much more fulfilling.

"It's always exciting to see all the work get done," Hanes said. "It keeps our staff motivated when they get a chance to see these families smile in-person."

Application Process

Although BRCA is nearing the end of its Duke Energy HHF allocation period, Hanes said she encourage clients to apply for services since they will continue to provide weatherization services to low-income families. Hanes said if a client is unable to come to the BRCA office locations, our organization's service workers could make a home visit when possible.

For more information on the weatherization services, visit their website at <http://www.brcainc.org/weatherization>. The Weatherization Services page provides more information about how weatherization helps low income families save energy and money and also informs clients on how to qualify for weatherization. Applicants must qualify for weatherization in order to qualify for the Duke funds.

Duke Energy's Helping Home Fund aides Lincolnton woman



MATT CHAPMAN
Staff Writer

Duke Energy launched its Helping Home Fund in January of last year and has since provided more than 2,000 families in North Carolina with up to \$10,000 of energy efficiency upgrades at no cost to the customer.

The Helping Home Fund is a \$20 million program funded by Duke Energy shareholders that was authorized through an agreement with the N.C. Public Staff and approved by the N.C. Utilities Commission in 2013. It serves families at or below 200 percent of federal poverty guidelines and helps income-qualified customers with upgrades that include the replacement of outdated washers and dryers, HVAC replacements, insulation and other weatherization benefits.

Duke Energy contracted the N.C. Community Action Association to administer the \$20 million of funding through 28 agencies across the state. In Lincoln County, more than \$58,000 from the Helping Home Fund has been administered through I Care Inc., a private non-profit that works to expand economic security for vulnerable families.

Patrenia Fair is one of the Lincoln County residents who has been helped by this collaboration between Duke Energy and I Care. She spent years living through sweltering summers and harsh winters in a home without a properly functioning heating and cooling system. Fair lacked the

disposable income to make the required fixes and the problems snowballed as the use of space heaters and window air conditioning units drove her energy costs through the roof.

“I thank God for these people who have helped me,” Fair said while fighting back tears. “I’m glad that they came by to see about me and cared enough to come check on me.”

Fair applied for the program through I Care and as a Duke Energy customer was eligible for assistance through the Helping Home Fund. Work began on her home in April as I Care replaced her electric baseboard heating and installed a brand new heat pump. In addition to the new heating system, Fair’s home also received weatherization upgrades and the fund provided her with a new, energy efficient refrigerator to help save additional money each month.

“I’ve been in this job for almost seven years and I’ll never forget the first home I went into,” Rick Stotts of I Care said. “It was a mobile home and it was in the winter time and it was freezing cold in there. I saw this young girl laying on the sofa with a bunch of blankets over her and I didn’t realize it right away, but she had a little baby under there trying to keep it warm. I have a real soft spot for older folks and kids. They’re so appreciative for what you do for them and you can see the difference it makes in their lives.”

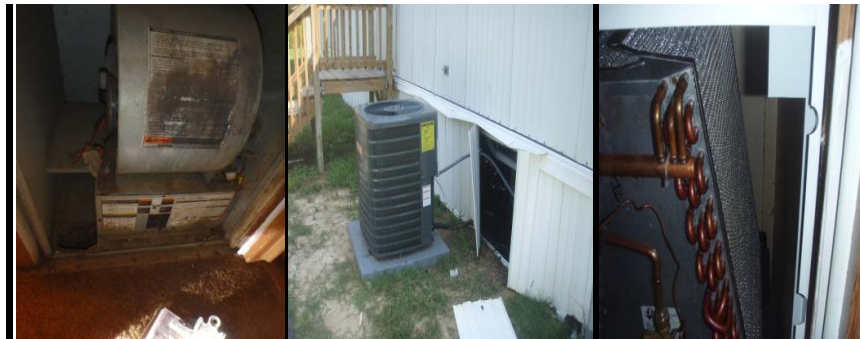
The Helping Home Fund is a one-time program, meaning that once the \$20 million has been spent the program is over. However, Duke Energy representatives are working on putting a similar initiative together sometime in the near future

“We are a very large company, but we want to try to reach out to everybody and have a conversation,” Duke Energy program manager Casey Fields said. “If it means that we can make a big enough change in someone’s life that you get emotional or you feel good about it, it makes my job much, much better at the end of the day. This is a phenomenal program and this is the right thing that we’re doing and it’s what we should be doing.”

Image courtesy of Matt Chapman

The customer was in need of energy saving measures for his mobile home. He is disabled and has limited income, which made it difficult to get much needed measures done to his home. [REDACTED] was grateful for all the assistance that Action Pathways along with Duke Energy's Helping Homes Funding provided to his home. [REDACTED] was very pleased with all the services he received by from weatherization program and has already seen a change in the way his home feels.

[REDACTED]'s Home



Old System

New Energy Efficient System



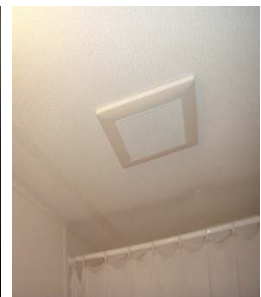
No Vapor Barrier



Vapor Barrier



Old Bath Fan



New Bath Fan

Since the start of the Duke Helping Homes program we have helped over 125 families in Macon County addressing health and safety issues and installing energy efficient appliances and heating systems to reduce their energy usage and monthly bills.

The health and safety part of the program enabled us to install handicap ramps, grab bars and do much needed porch repairs so that our clients could stay in their homes. Also we were able to install new heating and air conditioning systems where they were non-existent or beyond repair. This was so very important to our clients on oxygen and with health issues.

██████████ is one of our clients with health issues and cannot endure extreme cold or heat. She is very comfortable in her home now with her new heating and air system and does not have to go stay with relatives as she did in the past.

██████████ is a client who is on oxygen and installing a new heating and air system to his home eliminated the wood burning stove. He could no longer lift the logs and a dangerous situation was eliminated.

██████████ was in a nursing home and could not return home until a handicap ramp was installed. She is now able to be in her own home.

██████████ was in desperate need of a handicap ramp and since his wife is on oxygen, we were able to replace the propane system with a heat pump and install the handicap ramp.

██████████ was in need of porch repairs and a handicap ramp. He is now able to enter and exit his home safely and can stay there for many more years.

██████████ **and his wife** are both disabled and have a young child. They are truly grateful for the handicap ramp and heating and air system.

██████████ lives alone in a very rural area and was in need of a handicap ramp. She was in a nursing home and couldn't return home. We were able to install the needed ramp and also install a mini split heating system for her. She is now able to be at home.

So many of our clients have commented about how their lives have been changed for the good and how happy they are to see the reduction in their energy bills due to the appliance replacement program and HVAC replacement program.

Macon County Housing Department was able to use the monies from the Helping Home Fund in conjunction with other programs such as the Urgent Repair Program, HARRP, Single Family Rehab Program and the Weatherization Program.

We wish the program would be continued as there are many elderly, disabled and single parent families here who would benefit from being able to switch from wood burning stoves and the expensive propane heating to the energy efficient heat pumps.

Various Success Stories from Duke Energy's Helping Home Fund

██████████
Wilmington, NC

To Duke Energy Helping Home Fund:

How will I ever be able to thank you for kindness & generosity in helping us to get a new HVAC system put in. After living over a decade without heat and air, it had pretty much become a way of life for us to live in one room during cold and hot days. Using an electric heater to stay warm was neither safe or efficient. As students (trying to improve our lives) we would sit and do homework with hat, coat, & gloves on. For us, it was a normal way of life for many years. However, thanks to your Home fund and giving back to the community, Wilmington Area Rebuilding Ministry, Inc. was able to see to it that we were matched with you to be a recipient of your gift. It has changed our life overnight to have this new system in place. Thank you again and WARM for your kindness & especially for the volunteers at WARM for treating us with dignity & respect.

██████████
Durham, NC

[Received Air Sealing and Mechanical Ventilation]

This letter is to thank you for the amazing and wonderful maintenance work that was done to bring my home up to standard. I would never have been able to pay or save for the service that Your Company did for me. The company is a God Sent for Seniors.

I would like to thank the people (men) who performed the service, they were ██████████, the Auditor, ██████████, and the other two men from Charlotte, NC who did the electric work. They were very polite, friendly and respectable to me and my home. After the work was completed they checked to see if everything was working or performing correctly.

Again, Thank all of You.

██████████ [HVAC Replacement]

To whom it may concern. We just wanted to thank you for all you did for us. We could not have afforded this ourselves. It's good to know that in this messed up world we live in today, there is still people with goodness in them. I believe God will bless and prosper your company for what you do. We appreciated all your crews that came out. God bless you and good luck in the future.

██████████
Willow Spring, NC

[HVAC Replacement – Mechanical Ventilation]

Thank you for the weatherization of our home. The things did have definitely made a difference in our electric bill. We are so appreciative for the services that you provided because they were needed so badly and we could not afford to have any of the work done.

The gentlemen from your organization and the service providers from Therma Direct, Carolina Weatherization, and Lowe's were so respectful and extremely courteous.

[Redacted]
[Plumbing repairs & HVAC Repairs]

Wanted to say thank you so very much for help in facilitating all the repairs on my home. Already seeing a difference in energy bills. I have nothing but good things to say about your agency. Hope you all keep up the great work.

[Redacted]
Zebulon, NC
[HVAC Replacement]

My deepest appreciation to all administrators of Wake County Weatherization and Duke Energy Progress Heat/AC Assistance Programs. Because of your programs, I was blessed to get my Heat and AC needs met for only 25% of the total cost which was paid by my landlady.

[Redacted]
Henderson, NC

I would like to express my appreciation for this program. It has really helped me a lot. I would not have been able to have this work done without your help. My house has never been better.

The works were very professional and kept me informed on what was going on. They had to rework the duct work, install insulation, replaced attic steps, replaced roofing (ceiling tiles) and installation of the unit. There "wore" the best. Without this program, a lot of families would be without heat or air and a comfortable place to live.

[Redacted]
Just wanted to thank you and let you know how much I appreciate all that you all have done for me. The heating and cooling unit works great, and the washer and dryer are great, makes doing laundry a pleasure. All who came to my house to install everything, were so very very nice. I have never had that many new things that I didn't have to make monthly payments on. What a blessing.

Homeowner serviced by Coastal Community Action in New Port, NC

[Redacted] [Executive Director of Coastal Community Action] called this morning after receiving a call from a lady who had been helped through the Helping Home Fund. This lady was a retired teacher who because of sickness was no longer able to work. She had replaced the roof on her home before her funds ran out. She has been without heat for a very long time. The actual work will not be completed until tomorrow, but the lady was so overwhelmed with the kindness shown to her that she called [Redacted] and talked for over an hour. She said that she had never been treated as kind and was so appreciative of the professional staff at Coastal.

[Redacted]
Mount Airy, NC

Dear [Redacted] /Weatherization and Duke Power,

Just a note to say THANK YOU, so much, All of you, for my new A/C unit and the free installation of same. I've worked hard all my life and it is so much appreciated. To find people willing to help me so much in my older, non-working time and age. And what a year to get such a blessing – So hot!

[REDACTED]
Fuquay Varina, NC

I just had to thank you and your company for caring about our community and seniors. I have been so afraid of falling “again” in the winter with 2 inches of ice on my stairs, not even able to get out of my home. Through the money you gave to Senior Weatherization I am now much safer going in and out of my home. I am more than grateful for your helping me! I will be praying for God's blessings to overtake you and your company and your family.

You truly have been used by God to answer my prayers to keep me safe Thank you one million times

[REDACTED]
Charlotte, NC

I wanted to take this time to thank you for your service in making sure I have received my new GE Appliances, what a difference it has made in my home. Having appliances that are not only brand new, but are updated and just simply beautiful.

Thank you for your Help and the Change it has made in my life.

[REDACTED]
Raleigh/Durham

Season Greetings,

I did not want another day to go pass without me giving you all this big appreciative love email!! I am speechless and so grateful for all the work that was done to my home! I came to you with lots of concerns and not to mention a \$1200.00 light bills for two months. My family barely made it through the year because there was only money for the basics but God!!! There was no way I could have ever afford to do any of the work you all did! I am less stressed because my power bill has been cut down tremendously, we all sleep safe at night because you have installed smoke detectors and carbon monoxide detectors, I won't have animals crawling in the crawl space and it was fully insulated as well, and although it's not the last thing you all did but you all got rid of my 1980s refrigerator and blessed us with a new one. I am emotional right now just writing this email! If I ever was wavering in my faith, I am reminded every time I opened the front door and step inside my warm and cozy home 2 things-God has angels on earth and He is still performing miracles.

[REDACTED]
Boonville, NC

From the agency that served [REDACTED]

I had a delightful telephone call from [REDACTED] and wat to shar it. [REDACTED] is an elderly lady. She's an expressive person and has a jolly attitude and outlook about most things.

She called me to let me know Lowe's delivered her new refrigerator at 8:08am Tuesday morning. She said she "had no idea it would be so big and so pretty and so nice! That's a rich lady's refrigerator! I have never had a refrigerator I didn't have to buy on credit, make payments on, and do without, in order to get it. I'll be 83 next Wednesday and I think this is my birthday present from heaven! I don't know if other people call you to thank you for their refrigerators and let you know how nice they are, but I had to. I want to thank each one of you that had anything to do with helping me get my new refrigerator and heat pump. My house is nice and warm now!"

Success Story from Charlotte Area Fund

Good Afternoon [REDACTED],

I really did not know what I was going to do! For almost 5 years, my washing machine had been leaking, it took more than 2 hours for 1 load of clothes to dry, my refrigerator made a "humming" noise, and my oven door was broken.... the whole house was falling apart and honestly so was I!

I was barely making enough money to survive and just the thought of trying to replace worn out broken appliances was almost too much to bare. And then.... I read the article in the *Charlotte Area Fund Spring 2016 Newsletter* about the Charlotte Area Fund and Duke Energy Replacement Appliance Assistance Program and like an **angel** you helped a struggling resident obtain new appliances!

[REDACTED], you made the process so easy, you completed the paperwork quickly, and you were very professional. The contractor and the delivery personnel you sent to my home were extremely professional, courteous and completed the job in a timely manner. I thank the Good Lord for this program. I can now cook in a new modern oven, wash my clothes in an energy efficient washer and it only takes about **15 minutes for a load to dry!!**

I am so overjoyed at receiving these appliances words can hardly express my joy and gratitude!!

Thank you so much [REDACTED], the Charlotte Area Fund, and Duke Energy for this awesome program.

God Bless you once again.

POSTED ON [SEPTEMBER 7, 2016](#) BY [STOKES NEWS](#)

Couple benefit from Duke Energy's Helping Home Fund

By Amanda Dodson - adodson@civitasmedia.com



Anthony and Lydia Prysock, a retired couple living in the Walnut Tree community, were the recipients of home upgrades through Duke Energy's Helping Home Fund.

Anthony and Lydia Prysock, a retired couple living in the Walnut Tree community, were the recipients of a new high efficiency heating and cooling heat pump, a washer and dryer, and safety measure upgrades to their home through the Helping Home Fund. The two-year initiative, launched in January of 2015 by Duke Energy, reduces the burden of energy costs and electricity for families in North Carolina. The \$20 million community investment pays up to \$10,000 per household for repairs, new appliances, retrofitting for efficiency, and other electricity costs based on household income.

Last winter, the Prysock's were paying nearly \$400 a month using baseboard heating, a grueling amount for the couple who are on a fixed income. While they've slowly completed home renovations over the years, there was a mounting list of more to do.

"I noticed one of my neighbors down the street was having a heat pump put in and I asked the contractor to write up an estimate of how much it would cost at our house," Prysock said. "But as I was talking to the young lady, she told me about this program and I gave them a call."

After doing some research, Prysock realized he and his wife were eligible for Duke Energy's Helping Home Fund, and the program would easily cut his power bill in half.

"We applied and went through the process. I'm really thankful for this and for Duke Energy giving to our area. This is how you rebuild communities. What little money we did have we redid the cabinets and put on a new roof. It would have been a long time before we could have done anything like this."

The Helping Home Fund has invested over \$175,000 in Stokes County and helped 55 families receive energy-saving upgrades at no charge to income-qualified customers.

"The Prysock's are one of more than 2,000 families we've helped all over North Carolina. We've spent almost \$10 million dollars and we still have about another \$10 million," explained Lisa Parrish, Duke Energy's Government and Community Relations Manager. "We have great organizations we work with like YVEDDI that just know how to get it done."

Tommy Eads, the weatherization director from YVEDDI, said the program has been flooded with applicants and said when considering homes, they look at household size, yearly kilowatts usage, and income.

"We've done several houses on this street and some others close by. There's 334 projects that we have either started or completed in homes from Stokes, Surry, Yadkin and Davie. We service all four counties with the state and the Duke Energy program," Eads said. "It's great to be able to help the community. I feel like we get to be a part of making a difference one homeowner at a time."

Amanda Dodson can be reached at 336-813-2426 or on Twitter at AmandaTDodson.

June 12, 2015

Governor Pat McCrory
Office of the Governor
20301 Mail Service Center
Raleigh, NC 27699-0301

Dear Governor McCrory,

My heating and air conditioner quit working in January. I purchased some little heaters that kept me warm. I was employed for many years and was a single parent of two children. Unfortunately, I had to retire sooner than expected and being independent made that a hard transition. I called several companies for estimates and realized faith was my only solution. My daughter contacted an agency by the name of Coastal Community Action Inc, specifically its Weatherization Assistance Program and the Heating and Air Repair and Replacement Program. It was an answer to prayer! I called and spoke with [REDACTED] at Coastal Community, and she had me send in the necessary paper work to see if I qualified. She was very kind and helpful. My daughter had originally spoke with her boss, [REDACTED] and he talked with me and was very helpful, explaining the process that would take place. Next [REDACTED] the auditor, came to my house to inspect my whole house to see what could be done to weatherize my home. He was very precise checking throughout my home, and he explained how different things would be beneficial. I called and talked with [REDACTED] who is in charge of the whole program. She told me something that really stuck in my heart. She had presented a three hour presentation to get the funds and grants to help people. I had much gratitude that she had accomplished receiving the grants that would be a gift to so many people. I have never received such help so I am very appreciative. Then they sent the crew out to weatherize my home and to put in an exhaust fan, to wrap my hot water heater, to put a new shower head on, and carbon monoxide detection. They also put insulation around the duct work. These guys were very mannered and it was obvious there was great team work. These guys were [REDACTED], [REDACTED], [REDACTED]. [REDACTED] came to inspect their final job. These guys were awesome!

Coastal Community Action Inc. used an electrician, [REDACTED], with For A Electric and he was a super gentleman. They selected McLeans Heating and A/C, owner [REDACTED], whose workers were [REDACTED] and [REDACTED]. They installed a new unit and duct work. I was very pleased with their work and kindness.

I wanted to express my gratitude and share the great blessing I received and felt you should be aware of this wonderful organization and the gracious grants offered by Coastal Community Action! I would be so happy if you could acknowledge my appreciation to each one that has made my life more comfortable and efficient. I want to thank Duke Energy for their assistance and the other donors at Coastal Community Action who made the grants possible.

Sincerely,

.cc Coastal Community Action, CEO Lynn Good (Duke Energy)

April 28, 2016

Blue Ridge Community Action Inc.
601 East Fifth Street Ste. 255
Charlotte NC 28202

To Whom It May Concern,

My name is [REDACTED]. I have been a life long resident of the Stanly County area. During this time I made choices in my life that did not reflected a thoughtful planned out success for my future. So I struggled financially. Unfortunately, I never qualified to receive any of the grant money that was allotted to Stanly County to help those who were in need of assistance.

During my life in Stanly County I was blessed to have a son with disabilities which required total care. This job was the love and joy of my life for twenty years. Within that time I was attending school to get a degree which would increase pay, so I can better provide for my children. I had to drop out of school and had to let go many jobs because of my responsibility at home. He passed in 2009, and life itself was a struggle. At one point of my I had no hope nor did it even matter whether I got it together or not. One day, God, just gave me a want- to- live spirit again. So I found jobs that lasted short term and applied for assistance many times. This was very embarrassing and degrading because the people made you feel you just wanted a hand-out. The workers made you feel like scum. After being rejected many times, you have a fear of even seeking help. When it was cold I would put cover up to block off rooms so we would stay in one area of the house, using a space heater. When it was too hot, we would visit someone or mess around in stores until it cool off to go home. I heard about you through a friend at the Community Action in Albemarle. At my wits end I fearfully applied at the Blue Ridge Community Action.

My vocabulary does not even extend far enough to express what my heart truly feels for the blessing you gave my daughter and I. For two years we have been without heat and air. As a single parent making minimum wage and not forty hours a week, I had to prioritize which bills got paid and I just couldn't seem to fit this in my budget during that time. Through Gods power we survived.

I truly thank God for this program, and especially to one of your workers [REDACTED]. The compassionate spirit and concern was of one I have never experienced. Never once did I feel as though I was being seconded guessed about any information, nor made me feel inferior concerning my needs. Out of all the rejections and mistreatments were worth the reward of compassion we received.

Our hats off to you guys and our hands up to God for his mighty acts he showed through you as workers. Continue to show his love and he will continue to bless this business and each one individually for what you do for others.

Thanks,

[REDACTED]

Team effort helps keep man in home

Tim Reaves
reporter@thefranklinpress.com

Kenneth Cruse stood proud on his porch on West Old Murphy Road on Thursday.

"You don't know how much I appreciate it, folks," he said to a group of people from the county who helped him stay in his home.

Cruse, 64, is the beneficiary of a number of emergency repairs, weatherization and energy efficiency upgrades to his 86-year-old home. Over the last two years, he's seen his house repainted, his roof replaced, electrical service upgraded and the installation of an HVAC system, water heater, oven and insulation.

Cruse said the equipment upgrades and weatherization improvements have cut his power bill in half.

"It's quieter, it's warmer, I enjoy it now," he said. "I don't have to sit around in a sweat suit."

Duke Energy contributed about \$10,000 from its \$20 million statewide Helping Home Fund for a new stove, the rails on the porch and various weatherization upgrades, said Lisa Parrish, government and commu-

nity relations manager for the company. Other funding came from the North Carolina Housing Finance Agency. World Changers did much of the housework on Cruse's home, including the new porch.

"This is probably one of the best examples of a public-private partnership," said John Fay, housing director for Macon County Housing Department (MCHD). "It's really a melding of funds and effort by many different organizations. ... It was really great, because we got to do so much here."

Cruse is the third generation of his family to own the house, and he's lived there for 32 years. But propane expenses and electrical inefficiencies were pushing him to the breaking point.

"The way the house was set up before the intervention, there was no way," he said. "It's the only way I could've stayed in it."

Cruse, who lives on Social Security Disability and Supplemental Security Income, said he had no insulation in his home and an old gas furnace that seemed ready to catch on fire.

"Over the years, things

happened, things just deteriorated," he said.

He said a friend of his let him know about MCHD, so he filled out an application to see if he qualified for any of the funding. It's typical of most MCHD clients, Fay said. They usually hear about the agency and its programs from friends and family members or local medical or senior services. Then they come to the MCHD office on Old Murphy Road and fill out an application. Staff members look at a number of factors, including income level and problem severity to prioritize the work. MCHD has 250 homes that need some kind of repairs or weatherization upgrades.

"We make that determination and match the work with the capabilities," Fay said. "And sometimes we don't have those. Sometimes we end up having to use, for instance, Habitat for Humanity, Macon Baptist Association, various people in the community that are volunteers."

The work on Cruse's home represents a broader philosophy that places value on letting seniors age in place, Fay said.



Press photo/Tim Reaves
Kenneth Cruse pulls a pan out of an oven, which he received as part of Duke Energy's Helping Home Fund.

"It's important for people to be able to be around the things that they have comfort with and to be able to feel at home and not have to worry about it falling in on them," he said.

MCHD is located at 1419 Old Murphy Road, Franklin. Housing help is available for those who qualify. For more information, call 828-369-2605.

Norlina, NC - Warren County

To whom this may concern,

I wanted to send this letter of appreciation to Franklin Vance Warren and all of the companies that contributed to helping us make our home energy efficient, as well as, safe and livable. For the 2 years that we have had our home, it did not have a heating source. We used kerosene to stay warm in the winter and it was awful. My four children and myself developed asthma and breathing issues that we never had prior to using kerosene. The smell of the kerosene was so strong sometimes that it made our eyes water. We couldn't afford to do anything else besides the kerosene at that time. We finally invested in propane as our heating source, but it didn't heat up the whole house, so we used electric heaters as well. I am so thankful and grateful for the FVW programs because with their help, we were able to qualify for a program that installed central heating and air in our home and a gas pump that has now been such a blessing. With all of the work that the electricians and heating and cooling guys did, we would've never been able to afford such quality work and installation of this system. Not only did they help us in regards to our new heating source, but they also installed more insulation, installed a carbon monoxide detector, installed new shower heads, fixed holes in our walls, sheet rocked around our windows all in effort to help save us from wasting money by making our home energy efficient. They did so much and worked hard to make sure it was done correctly and with love. I can't imagine how my children and I, health would be today, if FVW hadn't been there for us. The most frustrating thing as a parent, is to watch your kids get sick while trying to protect them from freezing to death. It was like torture, to know that you had to do what you had to do to keep us all warm, while sacrificing our extended health in the process. I had to give my children breathing treatments daily, they suffered from headaches, nausea, and low energy and I believe it was from that kerosene. But now, they don't complain about headaches, they haven't had any breathing treatments since, and they are full of healthy energy. We are all happier and warm throughout the entire house. I now have peace of mind and deep gratitude in my heart for the program that I believe saved my families life. Thank you again for all of your help and investments into making our living situation better. Miracles&Blessings.

With Love,

[REDACTED]

CERTIFICATE OF SERVICE

I certify that a copy of Duke Energy Corporation's and Piedmont Natural Gas Company, Inc.'s Distribution of Funds, in Docket Nos. E-2, Sub 1095; E-7, Sub 1100 and G-9, Sub 682, has been served by electronic mail, hand delivery, or by depositing a copy in the United States Mail, 1st Class Postage Prepaid, properly addressed to parties of record.

This the 20th day of November, 2018.

A handwritten signature in black ink, reading "Kendrick C. Fentress", written over a horizontal line.

Kendrick C. Fentress
Associate General Counsel
Duke Energy Corporation
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