

# HEAP Block Grant Advisory Council Meeting

Thursday, August 1, 2024

A meeting of the Block Grant Advisory Council was held via WebEx on August 1, 2024. The meeting began at 1:00 pm.

## Attendees

Andy Stone, Executive Director, NYS Weatherization Directors Association

Anna Vitolins, NYS OTDA HEAP

Brady Morgan, NYS OTDA HEAP  
Emily Urban, NYS OTDA HEAP

Emily Urban, Bureau Chief, NYS OTDA HEAP

Kenneth Gossel, National Fuel Gas

Keri Stark, Director, NYS OTDA HEAP

Kira Pospesel, Commissioner, Greene County Social Services

Paul Brady, Executive Director, New York Public Welfare Association

Shiran Ybanez, New York City HEAP

Vivvy Williams, BGAC secretary

## Discussion

Vivvy Williams: Good afternoon, hopefully, we're up and running right now.

Ken Gossel: Good afternoon, welcome. This is the quarterly meeting of the HEAP Block Grant Advisory Council meeting. I'm going to first ask for everybody who is participating in the meeting to please identify themselves.

Andy Stone: I'm Andy Stone, I'm the Executive Director of NYSWADA. Can you hear me okay?

Ken Gossel: We can, Andy.

Andy Stone: WebEx always screws up on me I apologize.

Ken Gossel: Sure.

Paul Brady: I'm Paul Brady, the Executive Director of the New York Public Welfare Association.

Kira Pospesel: I'm Kira Pospesel, the Commissioner of Social Services in Greene County.

Ken Gossel: Thank you, Commissioner. Others at OTDA?

Keri Stark: You go ahead Emily, thanks, go right ahead, sorry.

Emily Urban: Hi, good afternoon, Emily Urban, OTDA HEAP Bureau Chief.

Keri Stark: Keri Stark, OTDA HEAP Director.

Vivvy Williams: And now, I think Anna is next.

Anna Vitolins: Anna Vitolins, New York State HEAP.

Brady Morgan: And my name is Brady Morgan, also New York State HEAP, nice to meet you all.

Shiran Ybanez: Shiran Ybanez here, New York City HEAP HRA.

Vivvy Williams: Vivvy Williams, Secretary for the BGAC HEAP Bureau.

Ken Gossel: Great, thank you all. I'm Ken Gossel, sorry, I did not introduce myself. Great to see you all again, and hopefully you're having a great summer thus far. I was going to start first asking if everybody has had an opportunity to see the meeting minutes from our last meeting on May 2nd. And if there are any proposed changes to those minutes?

Kira Pospesel: Ken, I will offer a motion to accept those minutes.

Ken Gossel: Thank you, Commissioner. Any seconds?

Paul Brady: I'll second.

Ken Gossel: All in favor? Aye.

All: Aye.

Ken Gossel: Done, great, well thank you. I'm going to start by turning over the discussion on the 2023/2024 program wrap up. Thanks.

Keri Stark: Thanks. Again, this is Keri. I'm going to start with our 23/24 funding update. So, HHS the total nationwide 23/24 LIHEAP funding is \$4.1 billion. 100% of that funding has been distributed. New York State was awarded a little less than 10% of those funds. Our final allocation was \$389 million. Initially, we had received 90% and that's what we based the district administrative allocations on, and our weatherization funding on. When we received the remaining federal funds, we recalculated the district administrative allocations, and those were distributed to all districts on Monday, July 22nd. We also executed amends with HPR, NYSERDA, and increased their funding as well. So, as the FFY 24 funding and program winds down, I can tell you it was a very successful year. We ran the regular benefit component from November 21, 23 through April 12, 24. Our emergency ran from January 2, 24 through July 19, 24, which included our second emergency benefit that opened on March 14th. Repair and Clean and Tune are still open and operating. Those both opened on October 2nd, 23, and they're going to close at the end of the program year on September 30th. Cooling ran from April 15th, 24 through July 19th, 24. So, we just shut that down not too long ago. So, for 23/24 HEAP benefits, the numbers we have most recent as of 7/19/24, indicate that for the regular component we issued 1.59 million benefits, which equated to about \$213 million in expenditures, which compared to last years' final benefits of 1.54 million in benefits and \$324 million in expenditures, so that was the previous year. For the 23/24 emergency benefit that we ran and just recently closed out, we issued 142,888 benefits and that was about \$78.9 million in expenditures as compared to the previous year of 136,843 benefits and that was about \$81 million in expenditures. For HERR so far, we've issued 2,955 benefits with \$9.3 million in

expenditures, last year we had issued actually 2,602 benefits with only \$7.7 million in expenditures. Clean and Tune we're at 5,400 benefits right now, and that's about \$1.7 million in expenditures compared to last year with 5,200 benefits and \$1.6 million in expenditures. That brings us lastly to cooling. So, far we have 39,000 benefits equating to \$30.6 million in expenditures, compared to last year it was 21,506 benefits and that was \$17.1 million in expenditures. These figures for 2024 still include pending applications, so in the case of cooling this does not take denials into consideration. So, our final expenditures will be lower, and we'll have a better idea of the actual cooling spending in September once all of the installations are complete and the invoices are paid. And the same thing with HERR and Clean and Tune, these benefits are still open, so our final figures will be higher by the time those benefits close on September 30th. We increased the maximum benefit levels for HERR and Clean and Tune 2 years ago, so the funding originally allocated to those benefits was not enough to keep them open year-round, so we were able to move funding out of regular to keep these benefits open, so that we don't have a gap and applicants can still apply for HERR and Clean and Tune. It's important that we keep those open year-round, particularly in September because households start to prepare for operating their heating systems for the winter, and we were able to move \$5 million into HERR and \$1 million into Clean and Tune.

We opened cooling 2 weeks earlier this year and that was very well received, especially given our hot summer in New York and several heatwaves that we've experienced so far across the state. There are 26,700 cooling pending applications statewide, 19,000 are around New York City. The maximum benefit for cooling is \$800 or \$1000 for a sleeve unit. The pending numbers include approved applications awaiting installation as well as households where their ACs were installed, and the district is still waiting for the final invoice from the vendor. So, districts continue to process all those remaining outstanding cooling apps. There was a very high demand for ACs this year, and thankfully, we had additional funding that we were able to provide to our original allocation of \$15 million because NYSERDA accepted \$7 million less in weatherization to help support the cooling program, which brought our cooling allocation up to \$22 million. So, without that funding, we would have had to close even earlier than the July 19th date. But we're very thankful for that.

One of the things that we have been advocating for is a cooling benefit for summer electric, but the feds haven't responded quite yet to our request for those. We did however have unspent emergency funding after the winter that allowed us to extend the closing date for emergency. So, with that benefit staying open, households who had a utility shutoff were able to apply for emergency benefit to keep their electric on. So, that was beneficial. On July 19th, emergency and the second emergency that we had operated as well as cooling all closed on July 19th. That unfortunately, lined up with the Microsoft worldwide outage that we experienced across the globe, so households that were unable to apply on Friday, July 19th, were permitted to apply the following Monday, July 22nd. Even with that additional money from NYSERDA that additional \$7 million, funding for cooling was exhausted quickly, again, due to the increased temperatures and the availability of an online cooling application in New York City. So, we are looking at, for next year, in our plan to increase our cooling funding that we allocate to this program, so we are definitely looking at that.

That does bring me to the 24/25 HEAP State Plan. So, we did complete that. It is in clearance right now. So, once it's approved by the Governor's Office, a draft of the plan will be posted to the OTDA website, and we will accept comments from the public. We held the public hearings

already in April, so there will be no additional hearings in the summer, but only a comment period. If any changes are needed based on the additional comments that we receive, a revised plan can be submitted to HHS during the program year, if necessary. So, we did plan next years' plan under the assumption of flat funding which was about \$389 million. Planning the program this year with that amount of funding should be helpful and allow us to better predict where the funds will be spent. It was a very mild winter that we had, but we always want to make sure we have enough set aside for regular and emergency, as well as find the balance between providing other needs during the year. So, our winter benefits for heat as well as other energy needs that we have throughout the year which is cooling and HERR and Clean and Tune.

So, some highlights of the proposed changes to the plan for next year. We are planning on running regular, first and second emergencies through March 31st. That's a change from the March 15th date that we had in previous years. We will run the first and second emergencies concurrently. So, that means, if the household has received the first emergency benefit, they can apply for a second benefit as soon as they are in need. Districts and households don't have to wait for a policy announcement from OTDA before they can issue a second emergency. The base heating benefits for regular and emergency are going to remain the same as they did for last year, but we have proposed to increase the add-on for households with income that falls in Tier 1, which is our lowest income tier. As I said earlier, we intend to allocate additional funding to the cooling component. So, that concludes the highlights for the proposed changes for our next years' plan.

I did want to share a little bit about our OTDA Utility Data Sharing match that we're actually implementing. So, a new law was passed which I'm sure you're familiar with on the Social Service Law 131 SS last year and it requires OTDA to develop a method to data match with the utility information for enrollment into the Utility Energy Affordability Programs. OTDA, HEAP and our Temporary Assistance Bureau were meeting with our systems bureau regularly to determine what type of data system is possible to accomplish this. We are envisioning a ping type system so that utilities may enter customer information and receive a response of enrolled or not enrolled from our OTDA system. We do have several upcoming meetings with the joint utilities to discuss our proposed ping system and whether the utilities have the capability and capacity to do that and if this solution is going to meet their needs.

Federal reporting, so I'm just going to provide a little update on where we are with that. OTDA is in discussions with ITS to discuss FFY 23 reports that are due at the end of this year. Test files to the utilities for performance measures went out on Monday, July 22nd. This report is important to know the energy burden for households based on their income and heating type, and it does help us determine if our HEAP benefit amounts are right sized. Based on data from FFY 22, performance measures report and NYSERDA data, that predicts the cost of heating in the upcoming winter. Our base heater benefits were appropriately sized to reduce the energy burden on a household. However, for households with the lowest income, so that would be the lowest 25% of households based on income, our benefits were not adequately reducing their energy burden, so that's why we proposed in next years' state plan to increase the add-on for regular heater benefits for the Tier 1, lowest income households for this upcoming program year.

Training, so HEAP regionals are starting next week to train the district HEAP coordinators, supervisor staff, and alternate certifiers. Our first regional is in Albany, and it will be held on

August 6th. Our team has put together a great agenda and has been working day and night on presentation materials. So, we are looking forward to great regionals across the state, and we will also continue to offer our ECT training to community workers, and those will be later in the fall. Those trainings will be given by PDP. And a couple of miscellaneous things; lastly, I did want to just advise the committee that letters have been drafted for legislative leaders to solicit nominations for the Block Grant Advisory Committee, and we are working to get those disseminated. An update on our next BGAC meeting, we have a date change, I believe in the last meeting we were looking at something in November. So, we are going to have the next meeting on November 7th. We are continuing to try to see about doing in person meetings, and we are going to look at doing those and getting back to that after the New Year. So, that concludes OTDA's updates. I'd like to hand it back to Ken.

Ken Gossel: Terrific, Keri. That's as efficient as it's ever been, applaud to you.

Keri Stark: That's all my staff too, everybody on this call has helped put this information together, so I thank them as well, thank you.

Ken Gossel: Thank you all. And great job this year yet again in running a terrific program, at least from my perspective, and really benefitting a lot of clients out there, so it's great to see. I'm going to let others ask questions first. I do have a few based on what you had presented, but open the floor for questions?

Kira Pospesel: So, this is Kira from Greene, so I'll just jump in, and I'll say, welcome to Keri, thank you. So, Keri, were you in the HEAP Bureau before, cause I know you just did a great job.

Keri Stark: Yes, yes, I worked in HEAP previously, and then I went and ran the Low Income Household Water Assistance Program. So, I was involved in that on the operational side, we issued benefits at the state level with that money from the pandemic relief funding. So, yeah, I was in HEAP though prior to that.

Kira Pospesel: Great and thank you. So, I have two questions from my staff cause I asked them this morning, cause this is always our opportunity to be heard. It is interesting what they told me. Because before, I would always hear dates about you know opening earlier, closing later, and all the little issues and system issues, but this year for the first time what they told me is that if all our friends from the vendor world can push the vendors to get their bills in sooner, we would be able to act a little bit quicker, which I was shocked to hear that. If the vendors could respond a little bit quicker to the clients, and I reminded them, I said, "They have the same problem we have, lack of staffing" but what they're hearing from the clients, so the clients are consistently saying the same thing. So, if we could just get everyone to be a little bit quicker, a little bit more efficient, then people will get paid and get whatever they need a little bit faster. So, it's a little different theme this year than what I normally would hear from the frontline staff.

Keri Stark: That's interesting. Yes, and when we do our vendor calls, we can continue to, and we can highlight that part of it and ask vendors to remember the timeframes and try to get those bills in sooner as well as respond to the clients in an adequate time period. Yes, we agree with that. We have found some issues with that with cooling as well. So, that is something that we will definitely prioritize in our calls with the vendors this year, thank you.

Emily Urban: How did cooling go this year, Commissioner?

Kira Pospesel: I'm sorry, I didn't hear that.

Emily Urban: How did cooling go this year?

Kira Pospesel: You know what, I think cooling could have gone another month plus, so I think it seemed like it was the hottest day when we were told, now maybe I'm just making that up, but it kind of felt like the hottest day, and all of a sudden, we were closing it. So, I think some of our most vulnerable that like our Adult Protective Service teammate potentially fine in the ongoing summer, then there really wasn't a benefit for them in this particular program. Obviously, we needed to come to a different solution. That team always reminds me that it's those few clients who are always left who really wouldn't understand how to apply in the beginning that we find in the communities on the hottest day of the year. So, it's that population that slips beyond all of us a lot of times.

Emily Urban: Yeah, that's important to hear, thank you for sharing. We just had a call actually this morning with NYSERDA to talk about other cooling solutions that we can do as a state not OTDA but coming together with the other state agencies to make cooling a more well-rounded program and make the funding go further. Thank you.

Andy Stone: Keri, hi, I'm Andy Stone, I'm with the New York State Weatherization Director's Association. I represent a network of weatherization programs around the state, welcome aboard. You mentioned the Water Assistance Program, I assume that money has been spent down and is gone now.

Keri Stark: That's correct. Yes, and there were no additional federal funds allocated to water unfortunately.

Andy Stone: Yeah, one of the things that we've been talking about, especially downstate, the ability to leverage additional funding into weatherization projects by owners through water reduction measures. So, we have a conference coming up in September and we're going to be discussing that more but the outlook for additional funding for the Water Assistance Program just does not look good at this point, right?

Keri Stark: Not that I've seen. I know we advocated for more funds for water, but the need that we saw was great, and we definitely did not fill the entire need for New York State. We still get, actually we still get phone calls requesting water assistance. So, we can tell that there is a need but yeah, at this time, nothing specifically for water that I've seen.

Andy Stone: Well, for Downstate and larger scale buildings, one of our goals is rent stabilization, if we can reduce the water consumption, it's going to save that property owner or NYTRA (?) or whoever else it might be, we could encourage them to continue to stabilize rents for a longer period of time. So, it's kind of a shame that that's gone now. We were hoping that if it had continued, we could work with you folks to see whether we could leverage some of that money into some of our projects.

Keri Stark: Yeah, that would have been great I know. It's a basic need. I thought it was a great program. I loved working in the water program. It again, it's a basic sustaining life need so yeah.

Andy Stone: Okay, thanks.

Keri Stark: Thank you.

Ken Gossel: Great, I was going to ask, what is the proposed opening date for HEAP?

Keri Stark: I think we have it as, what did we say, let me check real quick before I make a, November 1st.

Ken Gossel: Wonderful.

Keri Stark: Yep, we're going to open November 1st.

Ken Gossel: Great, and you did mention for the Tier 1 add-on benefit, do you know the dollar amount that you're recommending for that?

Keri Stark: Yes, another \$20. So, it's \$61 total.

Ken Gossel: Okay, great. Um, with respect to the automated identification for the utilities and the paying that you mentioned, is there the ability potentially for the utilities to find out what the total HEAP benefit is. And I can explain that just quickly. We are at times receiving reduced amounts when a renter including benefit goes on, and other times, we're getting amounts that we're deeming anomalous. So, it might be that our customer was receiving HEAP with another utility vendor, moves into our territory, and the balance of those monies are sent to us, and what the utilities are looking to do, and can do is if they get the full amount of the HEAP benefit, we can basically put that customer into the most beneficial discount level tier, we all run, major utilities run these energy efficiency energy affordability programs EAPS, and the more we can streamline the availability of information the better and more quickly we can place those customers onto the most beneficial tier. So, I was hoping that maybe through these discussions we could explore that possibility because if we don't, we're going to have to have a lot of communication either with the local districts and/or somehow OTDA to try to find out what the full benefit amount is of HEAP for purposes in these customers.

Keri Stark: That was one thing that came up in our first call with the utilities, I think it was Liberty Utilities advised that it would be beneficial to know the amount of the HEAP benefit, for the situation that you described regarding the anomalous amounts. But they also had a situation where they have an account with the utility company for the gas for their stove and they received like an oil benefit or a heater's benefit, we won't know, you know what I mean? So that's another thing that, so they wouldn't know the HEAP amount because they're not getting the HEAP benefit from us. So, something like that, yeah, that did come up and we are looking at that. So, we will take that back and talk about that with our systems bureau, yes.

Ken Gossel: Wonderful, that's great. And OTDA does participate in the Department of Public Service EAP working group. We had a meeting in July and talked about our next meeting involving OTDA and just furthering that discussion, because it would help to streamline and better equip the utilities with, I guess more immediate information to better benefit their customers, and again be administratively less burdensome on either the local agencies or OTDA. So, that is greatly appreciated.

Keri Stark: Yes, and I know we're working within a certain set of parameters as well, but I'm definitely going to bring that back and see what we can do, yeah, thank you for that.

Ken Gossel: Great. I also want to applaud you in getting the letters prepared for the legislatures and others for purposes of further expanding the reach of this organization, that is greatly

appreciated. And welcome. And this was great to have this excellent presentation today, thank you.

Keri Stark: Thank you everybody on the call, I appreciate the information that you're providing to us as well, and its good feedback, thank you.

Ken Gossel: So, firstly are there any other items or questions for Keri and if not, open discussion items that other members might have? Hearing none, I do see that on the agenda the next date has been moved up into November, Thursday November 7th, our next scheduled meeting. I take it that will also be via WebEx as opposed to in studio.

Keri Stark: Yeah, I think so. I think we're going to try to do the in studio after the new year and hopefully, we'll have some more members and things like that that we can have more of a discussion as well.

Ken Gossel: That would be helpful. We talked about maybe reinstating perhaps at least once a year, maybe not in February for travel, and it can be a balance. But I think you're right, there's good opportunity to be meeting in person and throw some new ideas around and whatnot, so that's greatly appreciated.

Keri Stark: Thank you.

Ken Gossel: So, does anybody have anything else? If not, I will entertain a motion to conclude the meeting.

Andy Stone: I'll make that motion Ken.

Ken Gossel: Thank you, Andy, second?

Kira Pospesel: And I'll second that.

Ken Gossel: Thank you, Commissioner. All in favor?

All: Aye.

Ken Gossel: Opposed? There being none, thank you all for your excellent and hard work, it's greatly appreciated. Enjoy the rest of the summer and be safe. I look forward to a great opening and another great HEAP year.