

# Case Assignment and Scheduling Record

Section 1 - Division of Records and Repro (RAR) Completes

Docket No. 971006-EG Date Docketed: 08/06/1997 Title: Adoption of Numeric Conservation Goals by Gulf Power Company.

Company: Gulf Power Company

Official Filing Date: \_\_\_\_\_  
Last Day to Suspend: \_\_\_\_\_

Expiration: \_\_\_\_\_

Referred to:  
("()" indicates OPR)

ADM AFA APP CAF CMU (EAG) GCL LEG RAR RRR WAW  
\_\_\_\_\_ X \_\_\_\_\_ X \_\_\_\_\_

Section 2 - OPR Completes and returns to RAR in 10 workdays.

Time Schedule

Program/Module C5

Staff Assignments

OPR Staff

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Staff Counsel

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Recommended assignments for hearing  
and/or deciding this case:

Full Commission \_\_\_\_\_ Commission Panel \_\_\_\_\_  
Hearing Examiner \_\_\_\_\_ Staff \_\_\_\_\_

Date filed with RAR: \_\_\_\_\_

Initials: OPR \_\_\_\_\_  
Staff Counsel \_\_\_\_\_

**WARNING: THIS SCHEDULE IS AN INTERNAL PLANNING DOCUMENT.  
IT IS TENTATIVE AND SUBJECT TO REVISION.  
FOR UPDATES CONTACT THE RECORDS SECTION: (850) 413-6770  
Current CASR revision level**

0

Due Dates

Previous Current

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Section 3 - Chairman Completes

Assignments are as follows:

- Hearing Officer(s)

| Commissioners |    |    |    |    |    | Hrg.<br>Exam. | Staff |
|---------------|----|----|----|----|----|---------------|-------|
| ALL           | JN | DS | CL | KS | GR |               |       |
|               |    |    |    |    |    |               |       |

- Prehearing Officer

| Commissioners |    |    |    |    | ADM |
|---------------|----|----|----|----|-----|
| JN            | DS | CL | KS | GR |     |
|               |    |    |    |    |     |

DOCUMENT NO.

Where panels are assigned the senior Commissioner is Panel Chairman;  
the identical panel decides the case.

Where one Commissioner, a Hearing Examiner or a Staff Member is  
assigned the full Commission decides the case.

Approved: \_\_\_\_\_

Date: / /

16602-99

## Section 1 - Division of Records and Report (RAR) Completes

Docket No. 971006-EG Date Docketed: 08/06/1997 Title: Adoption of Numeric Conservation Goals by Gulf Power Company.  
 Company: Gulf Power Company

Official Filing Date: \_\_\_\_\_  
 Last Day to Suspend: \_\_\_\_\_ Expiration: \_\_\_\_\_

Referred to: \_\_\_\_\_ ADM \_\_\_\_\_ AFA \_\_\_\_\_ APP \_\_\_\_\_ CAF \_\_\_\_\_ CMU \_\_\_\_\_ (EAG) X \_\_\_\_\_ GCL \_\_\_\_\_ LEG X \_\_\_\_\_ RAR \_\_\_\_\_ RRR \_\_\_\_\_ WAW \_\_\_\_\_  
 ("(") indicates OPR)

## Section 2 - OPR Completes and returns to RAR in 10 workdays.

## Time Schedule

Program/Module C5

## Staff Assignments

OPR Staff M Haff, J Dillmore, P LoweryStaff Counsel L Paugh

OCRs ( ) \_\_\_\_\_

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Recommended assignments for hearing  
 and/or deciding this case:

Full Commission X Commission Panel \_\_\_\_\_  
 Hearing Examiner \_\_\_\_\_ Staff \_\_\_\_\_

Date filed with RAR: 08/13/1997

Initials: OPR \_\_\_\_\_  
 Staff Counsel \_\_\_\_\_

WARNING: THIS SCHEDULE IS AN INTERNAL PLANNING DOCUMENT.  
 IT IS TENTATIVE AND SUBJECT TO REVISION.  
 FOR UPDATES CONTACT THE RECORDS SECTION: (850) 413-6770  
 Current CASR revision level

0

## Due Dates

Previous Current

|                     |      |            |
|---------------------|------|------------|
| 1. Staff Workshop   | NONE | 10/08/1997 |
| 2. Staff Workshop   | NONE | 11/19/1997 |
| 3. Revised CASR Due | NONE | 12/01/1997 |
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## Section 3 - Chairman Completes

Assignments are as follows:

- Hearing Officer(s)

| Commissioners |    |    |    |    |    | Hrg.<br>Exam. | Staff |
|---------------|----|----|----|----|----|---------------|-------|
| ALL           | JN | DS | CL | KS | GR |               |       |
| X             |    |    |    |    |    |               |       |

- Prehearing Officer

| Commissioners |    |    |    |    | ADM |
|---------------|----|----|----|----|-----|
| JN            | DS | CL | KS | GR |     |
|               |    |    |    | X  |     |

Where panels are assigned the senior Commissioner is Panel Chairman;  
 the identical panel decides the case.  
 Where one Commissioner, a Hearing Examiner or a Staff Member is  
 assigned the full Commission decides the case.

Approved: ff/mDate: 08/13/1997



## Section 1 - Division of Records and Reporting (RAR) Completes

Docket No. 971006-EG Date Docketed: 08/06/1997 Title: Adoption of Numeric Conservation Goals by Gulf Power Company.  
 Company: Gulf Power Company

Official Filing Date: \_\_\_\_\_  
 Last Day to Suspend: \_\_\_\_\_

Expiration: \_\_\_\_\_

Referred to:  
 ("()") indicates OPR)

ADM AFA APP CAF CMU (EAG) GCL LEG RAR RRR WAW  
 \_\_\_\_\_ X \_\_\_\_\_ X \_\_\_\_\_

## Section 2 - OPR Completes and returns to RAR in 10 workdays.

## Time Schedule

Program/Module C5

## Staff Assignments

OPR Staff M Haff, J Dillmore, P LoweryStaff Counsel L Paugh

OCRs ( ) \_\_\_\_\_

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Recommended assignments for hearing  
 and/or deciding this case:

Full Commission X Commission Panel \_\_\_\_\_  
 Hearing Examiner \_\_\_\_\_ Staff \_\_\_\_\_

Date filed with RAR: 08/13/1997

Initials: OPR \_\_\_\_\_  
 Staff Counsel \_\_\_\_\_

WARNING: THIS SCHEDULE IS AN INTERNAL PLANNING DOCUMENT.  
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 FOR UPDATES CONTACT THE RECORDS SECTION: (850) 413-6770  
 Current CASR revision level

0

## Due Dates

Previous Current

|                     |      |            |
|---------------------|------|------------|
| 1. Staff Workshop   | NONE | 01/07/1998 |
| 2. Revised CASR Due | NONE | 02/06/1998 |
| 3.                  |      |            |
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## Section 3 - Chairman Completes

Assignments are as follows:

- Hearing Officer(s)

| Commissioners |    |    |    |    |    | Hrg.<br>Exam. | Staff |
|---------------|----|----|----|----|----|---------------|-------|
| ALL           | JN | DS | CL | KS | GR |               |       |
| X             |    |    |    |    |    |               |       |

- Prehearing Officer

| Commissioners |    |    |    |    | ADM |
|---------------|----|----|----|----|-----|
| JN            | DS | CL | KS | GR |     |
|               |    |    |    | X  |     |

Where panels are assigned the senior Commissioner is Panel Chairman;  
 the identical panel decides the case.  
 Where one Commissioner, a Hearing Examiner or a Staff Member is  
 assigned the full Commission decides the case.

Approved: 4/1/97Date: 11/25/1997

## Section 1 - Division of Records and Reporting (RAR) Completes

Expiration: \_\_\_\_\_

|     |     |     |     |     |            |     |          |     |     |     |
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| ADM | AFA | APP | CAF | CMU | (EAG)<br>X | GCL | LEG<br>X | RAR | RRR | WAW |
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Section 2 - OPR Completes and returns to RAR in 10 workdays.

### Time Schedule

Program/Module C5

### Staff Assignments

OPR Staff M Haff, P Lowery

Staff Counsel L. Paugh

OCRs ( ) \_\_\_\_\_

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Recommended assignments for hearing  
and/or deciding this case:

Full Commission X Commission Panel \_\_\_\_\_  
Hearing Examiner \_\_\_\_\_ Staff \_\_\_\_\_

Date filed with RAR: 03/27/1998

Initials: OPR \_\_\_\_\_  
Staff Counsel \_\_\_\_\_

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FOR UPDATES CONTACT THE RECORDS SECTION: (850) 413-6770  
Current CASR revision level

### Due Dates

Previous Current

1

1. Utility Proposed Numerical Goals Filed
2. Utility Direct Testimony and Exhibits
3. Preliminary Issue Statements
4. Intervenor's Direct Testimony and Exhibits
5. Staff's Direct Testimony and Exhibits
6. Issue Identification
7. Utility's Rebuttal Testimony and Exhibits
8. Prehearing Statements
9. Notice of Prehearing and Hearing
10. Last Day to Conduct Discovery
11. Prehearing
12. Prehearing Transcripts Due
13. Hearing 5/10-14/99
14. Hearing Transcripts Due
15. Briefs Due
16. Staff Recommendation
17. Agenda - Regular
18. Standard Order
19. Case Closing
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|      |            |
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| SAME | 02/01/1999 |
| SAME | 02/01/1999 |
| SAME | 03/08/1999 |
| SAME | 03/22/1999 |
| SAME | 03/29/1999 |
| SAME | 03/31/1999 |
| SAME | 04/12/1999 |
| SAME | 04/14/1999 |
| SAME | 04/19/1999 |
| SAME | 04/23/1999 |
| SAME | 04/26/1999 |
| SAME | 05/07/1999 |
| SAME | 05/10/1999 |
| SAME | 05/26/1999 |
| SAME | 06/07/1999 |
| SAME | 07/08/1999 |
| SAME | 07/20/1999 |
| SAME | 08/09/1999 |
| SAME | 09/08/1999 |

## Section 3 - Chairman Completes

Assignments are as follows:

- Hearing Officer(s)

| Commissioners |    |    |    |    |    | Hrg.<br>Exam. | Staff |
|---------------|----|----|----|----|----|---------------|-------|
| ALL           | JN | DS | CL | GR | JC |               |       |
| X             |    |    |    |    |    |               |       |

Where panels are assigned the senior Commissioner is Panel Chairman; the identical panel decides the case.  
Where one Commissioner, a Hearing Examiner or a Staff Member is assigned the full Commission decides the case.

- Prehearing Officer

|               |    |    |    |    |     |
|---------------|----|----|----|----|-----|
| Commissioners |    |    |    |    | ADM |
| JN            | DS | CL | GR | JC |     |
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Approved:                     *LF / m*                    

Date: 03/27/1998

## Case Assignment and Scheduling Record

## Section 1 - Division of Records and Reporting (RAR) Completes

Docket No. 971006-EG Date Docketed: 08/06/1997 Title: Adoption of Numeric Conservation Goals by Gulf Power Company.  
 Company: Gulf Power Company

Official Filing Date: \_\_\_\_\_  
 Last Day to Suspend: \_\_\_\_\_ Expiration: \_\_\_\_\_

Referred to: \_\_\_\_\_ ADM \_\_\_\_\_ AFA \_\_\_\_\_ APP \_\_\_\_\_ CAF \_\_\_\_\_ CMU \_\_\_\_\_ (EAG) \_\_\_\_\_ GCL \_\_\_\_\_ LEG \_\_\_\_\_ RAR \_\_\_\_\_ RRR \_\_\_\_\_ WAW \_\_\_\_\_  
 ("(") indicates OPR)

## Section 2 - OPR Completes and returns to RAR in 10 workdays.

## Time Schedule

Program/Module C5

## Staff Assignments

OPR Staff M Haff, P Lowery  
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Recommended assignments for hearing  
 and/or deciding this case:

Full Commission X Commission Panel \_\_\_\_\_  
 Hearing Examiner \_\_\_\_\_ Staff \_\_\_\_\_

Date filed with RAR: 03/27/1998

Initials: OPR \_\_\_\_\_  
 Staff Counsel \_\_\_\_\_

WARNING: THIS SCHEDULE IS AN INTERNAL PLANNING DOCUMENT.  
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 FOR UPDATES CONTACT THE RECORDS SECTION: (850) 413-6770  
 Current CASR revision level

## Due Dates

Previous Current

|   |      |            |
|---|------|------------|
| 1. Utility Proposed Numerical Goals Filed     | SAME | 02/01/1999 |
| 2. Utility Direct Testimony and Exhibits      | SAME | 02/01/1999 |
| 3. Preliminary Issue Statements               | SAME | 03/08/1999 |
| 4. Intervenor's Direct Testimony and Exhibits | SAME | 03/22/1999 |
| 5. Staff's Direct Testimony and Exhibits      | SAME | 03/29/1999 |
| 6. Issue Identification                       | SAME | 03/31/1999 |
| 7. Utility's Rebuttal Testimony and Exhibits  | SAME | 04/12/1999 |
| 8. Prehearing Statements                      | SAME | 04/14/1999 |
| 9. Notice of Prehearing and Hearing           | SAME | 04/19/1999 |
| 10. Last Day to Conduct Discovery             | SAME | 04/23/1999 |
| 11. Prehearing                                | SAME | 04/26/1999 |
| 12. Prehearing Transcripts Due                | SAME | 05/07/1999 |
| 13. Hearing 5/10-14/99                        | SAME | 05/10/1999 |
| 14. Hearing Transcripts Due                   | SAME | 05/26/1999 |
| 15. Briefs Due                                | SAME | 06/07/1999 |
| 16. Staff Recommendation                      | SAME | 07/08/1999 |
| 17. Agenda - Regular                          | SAME | 07/20/1999 |
| 18. Standard Order                            | SAME | 08/09/1999 |
| 19. Case Closing                              | SAME | 09/08/1999 |
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## Section 3 - Chairman Completes

Assignments are as follows:

- Hearing Officer(s)

| Commissioners |    |    |    |    |    | Hrg.<br>Exam. | Staff |
|---------------|----|----|----|----|----|---------------|-------|
| ALL           | JN | DS | CL | GR | JC |               |       |
| X             |    |    |    |    |    |               |       |

- Prehearing Officer

| Commissioners |    |    |    |    | ADM |
|---------------|----|----|----|----|-----|
| JN            | DS | CL | GR | JC |     |
|               |    |    | X  |    |     |

Where panels are assigned the senior Commissioner is Panel Chairman;  
 the identical panel decides the case.

Where one Commissioner, a Hearing Examiner or a Staff Member is  
 assigned the full Commission decides the case.

Approved: 7/1/98 CSRADate: 06/18/1998





## Case Assignment and Scheduling Record

## Section 1 - Division of Records and Reporting (RAR) Completes

Docket No. 971006-EG Date Docketed: 08/06/1997 Title: Adoption of Numeric Conservation Goals by Gulf Power Company.  
 Company: Gulf Power Company

Official Filing Date: \_\_\_\_\_  
 Last Day to Suspend: \_\_\_\_\_ Expiration: \_\_\_\_\_

Referred to: \_\_\_\_\_ ADM AFA APP CAF CMU (EAG) GCL LEG RAR PAI WAW  
 ("() indicates OPR) \_\_\_\_\_ X \_\_\_\_\_ X \_\_\_\_\_

## Section 2 - OPR Completes and returns to RAR in 10 workdays.

## Time Schedule

Program/Module C5

## Staff Assignments

OPR Staff M Haff, P Lowery  
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 Staff Counsel L Paugh  
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Recommended assignments for hearing  
 and/or deciding this case:

Full Commission X Commission Panel \_\_\_\_\_  
 Hearing Examiner \_\_\_\_\_ Staff \_\_\_\_\_

Date filed with RAR: 04/14/1999

Initials: OPR \_\_\_\_\_  
 Staff Counsel \_\_\_\_\_

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 FOR UPDATES CONTACT THE RECORDS SECTION: (850) 413-6770  
 Current CASR revision level

## Due Dates

Previous Current

|   |            |            |
|---|------------|------------|
| 1. Intervenor's Direct Testimony and Exhibits | 03/22/1999 | 06/25/1999 |
| 2. Staff's Direct Testimony and Exhibits      | 06/25/1999 | 07/09/1999 |
| 3. Issue Identification                       | 06/30/1999 | 07/13/1999 |
| 4. Standard Order                             | SAME       | 07/19/1999 |
| 5. Prehearing Statements                      | 07/16/1999 | 07/19/1999 |
| 6. Utility's Rebuttal Testimony and Exhibits  | 07/09/1999 | 07/23/1999 |
| 7. Prehearing Transcripts Due                 | 05/07/1999 | 08/04/1999 |
| 8. Last Day to Conduct Discovery              | 04/23/1999 | 08/06/1999 |
| 9. Amended Notice of Prehearing and Hearing   | 07/19/1999 | 08/09/1999 |
| 10. Prehearing                                | 07/26/1999 | 08/16/1999 |
| 11. Hearing 8/18-20/99                        | 05/10/1999 | 08/18/1999 |
| 12. Hearing Transcripts Due                   | 05/26/1999 | 08/27/1999 |
| 13. Briefs Due                                | 06/07/1999 | 09/10/1999 |
| 14. Staff Recommendation                      | 07/08/1999 | 10/07/1999 |
| 15. Agenda - Regular                          | 07/20/1999 | 10/19/1999 |
| 16. Standard Order                            | 08/09/1999 | 11/08/1999 |
| 17. Case Closing                              | 09/08/1999 | 12/08/1999 |
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## Section 3 - Chairman Completes

Assignments are as follows:

## - Hearing Officer(s)

| Commissioners |    |    |    |    |    | Hrg.<br>Exam. | Staff |
|---------------|----|----|----|----|----|---------------|-------|
| ALL           | GR | DS | CL | JN | JC |               |       |
| X             |    |    |    |    |    |               |       |

## - Prehearing Officer

| Commissioners |    |    |    |    | ADM |
|---------------|----|----|----|----|-----|
| GR            | DS | CL | JN | JC |     |
| X             |    |    |    |    |     |

Where panels are assigned the senior Commissioner is Panel Chairman;  
 the identical panel decides the case.

Where one Commissioner, a Hearing Examiner or a Staff Member is  
 assigned the full Commission decides the case.

Approved: [Signature]

CSA

Date: 07/13/1999



## Section 1 - Division of Records and Reporting (RAR) Completes

Docket No. 971006-EG Date Docketed: 08/06/1997 Title: Adoption of Numeric Conservation Goals by Gulf Power Company.  
 Company: Gulf Power Company

Official Filing Date: \_\_\_\_\_  
 Last Day to Suspend: \_\_\_\_\_

Expiration: \_\_\_\_\_

Referred to:  
 ("()") indicates OPR)

ADM AFA APP CAF CMU (EAG) GCL LEG RAR PAI WAW  
 \_\_\_\_\_ X \_\_\_\_\_ X \_\_\_\_\_

## Section 2 - OPR Completes and returns to RAR in 10 workdays.

## Time Schedule

Program/Module C5

## Staff Assignments

OPR Staff M Haff, S BrownStaff Counsel L Paugh

OCRs ( ) \_\_\_\_\_

( ) \_\_\_\_\_

( ) \_\_\_\_\_

( ) \_\_\_\_\_

( ) \_\_\_\_\_

Recommended assignments for hearing  
 and/or deciding this case:

Full Commission X Commission Panel \_\_\_\_\_  
 Hearing Examiner \_\_\_\_\_ Staff \_\_\_\_\_

Date filed with RAR: 08/03/1999

Initials: OPR \_\_\_\_\_  
 Staff Counsel \_\_\_\_\_

WARNING: THIS SCHEDULE IS AN INTERNAL PLANNING DOCUMENT.  
 IT IS TENTATIVE AND SUBJECT TO REVISION.  
 FOR UPDATES CONTACT THE RECORDS SECTION: (850) 413-6770  
 Current CASR revision level

6

## Due Dates

Previous Current

|  |            |            |
|--|------------|------------|
| 1. Last Day to Conduct Discovery             | 04/23/1999 | 08/06/1999 |
| 2. Utility's Rebuttal Testimony and Exhibits | 07/23/1999 | 08/06/1999 |
| 3. Prehearing Statements                     | 07/19/1999 | 08/09/1999 |
| 4. Prehearing                                | 07/26/1999 | 08/16/1999 |
| 5. Hearing                                   | 08/18/1999 | 08/17/1999 |
| 6. Prehearing Transcripts Due                | 08/04/1999 | 08/17/1999 |
| 7. Hearing Transcripts Due                   | 08/27/1999 | 08/31/1999 |
| 8. Briefs Due                                | 09/10/1999 | 09/14/1999 |
| 9. Staff Recommendation                      | 07/08/1999 | 10/07/1999 |
| 10. Agenda - Regular                         | 07/20/1999 | 10/19/1999 |
| 11. Standard Order                           | 08/09/1999 | 11/08/1999 |
| 12. Case Closing                             | 09/08/1999 | 12/08/1999 |
| 13.  |            |            |
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## Section 3 - Chairman Completes

Assignments are as follows:

## - Hearing Officer(s)

| Commissioners |    |    |    |    |    | Hrg.<br>Exam. | Staff |
|---------------|----|----|----|----|----|---------------|-------|
| ALL           | GR | DS | CL | JN | JC |               |       |
| X             |    |    |    |    |    |               |       |

## - Prehearing Officer

| Commissioners |    |    |    |    | ADM |
|---------------|----|----|----|----|-----|
| GR            | DS | CL | JN | JC |     |
| X             |    |    |    |    |     |

Where panels are assigned the senior Commissioner is Panel Chairman;  
 the identical panel decides the case.  
 Where one Commissioner, a Hearing Examiner or a Staff Member is  
 assigned the full Commission decides the case.

Approved: \_\_\_\_\_

Date: 08/03/1999



**RUTLEDGE, ECENIA, UNDERWOOD, PURNELL & HOFFMAN**

PROFESSIONAL ASSOCIATION  
ATTORNEYS AND COUNSELORS AT LAW

STEPHEN A. ECENIA  
KENNETH A. HOFFMAN  
THOMAS W. KONRAD  
MICHAEL G. MAIDA  
J. STEPHEN MENTON  
R. DAVID PRESCOTT  
HAROLD F. X. PURNELL  
GARY R. RUTLEDGE  
R. MICHAEL UNDERWOOD  
WILLIAM B. WILLINGHAM

POST OFFICE BOX 551, 32302-0551  
215 SOUTH MONROE STREET, SUITE 420  
TALLAHASSEE, FLORIDA 32301-1841

TELEPHONE (850) 681-6788  
TELECOPIER (850) 681-6515

August 18, 1997

GOVERNMENTAL CONSULTANTS  
PATRICK R. MALOY  
AMY J. YOUNG

**RECEIVED**

AUG 18 1997

FPSC - Records/Reporting

Ms. Blanca Bayo, Director  
Division of Records and Reporting  
Florida Public Service Commission  
2540 Shumard Oak Boulevard  
Betty Easley Conference Center  
Room 110  
Tallahassee, Florida 32399-0850

Re: Florida PSC Docket No. 971006-EG  
Adoption of Numeric Conservation Goals by Gulf Power  
Company

Dear Ms. Bayo:

The undersigned represents the Florida Public Utilities Company ("FPUC"). FPUC is interested in the above-referenced docket. Please provide copies of all notices, CASRs, orders, staff recommendations, pleadings and other documents filed, served or issued in the above-referenced docket to the following:

William B. Willingham, Esq.  
Rutledge, Ecenia, Underwood,  
Purnell & Hoffman, P.A.  
P. O. Box 551  
Tallahassee, Florida 32302-0551  
(904) 681-6788 (phone)  
(904) 681-6515 (fax)

Thank you for your assistance in this matter.

Sincerely,

  
William B. Willingham

WBW/rl

DOCUMENT NO.

16602-99

**RUTLEDGE, ECENIA, UNDERWOOD, PURNELL & HOFFMAN**

PROFESSIONAL ASSOCIATION  
ATTORNEYS AND COUNSELORS AT LAW

STEPHEN A. ECENIA  
KENNETH A. HOFFMAN  
THOMAS W. KONRAD  
MICHAEL G. MAIDA  
J. STEPHEN MENTON  
R. DAVID PRESCOTT  
HAROLD F. X. PURNELL  
GARY R. RUTLEDGE  
R. MICHAEL UNDERWOOD  
WILLIAM B. WILLINGHAM

POST OFFICE BOX 551, 32302-0551  
215 SOUTH MONROE STREET, SUITE 420  
TALLAHASSEE, FLORIDA 32301-1841

TELEPHONE (850) 681-6788  
TELECOPIER (850) 681-6515

GOVERNMENTAL CONSULTANTS:  
PATRICK R. MALOY  
AMY J. YOUNG

**RECEIVED**

OCT 16 1997

FPSC - Records/Reporting

October 14, 1997

Ms. Blanca Bayo, Director  
Division of Records and Reporting  
Florida Public Service Commission  
2540 Shumard Oak Boulevard  
Betty Easley Conference Center, Room 110  
Tallahassee, Florida 32399-0850

RE: Florida PSC Docket Nos. 971004-EG; 971005-EG; 971006-EG and 971007-EG

Dear Ms. Bayo:

The undersigned represents Florida Public Utilities Company ("FPU"). FPU is interested in the above-referenced dockets. Please provide copies of all notices, CASRs, orders, staff recommendations, pleadings and other documents filed, served or issued in the above-referenced dockets to the following:

William B. Willingham, Esq.  
Rutledge, Ecenia, Underwood,  
Purnell & Hoffman, P.A.  
P. O. Box 551  
Tallahassee, FL 32302-0551  
(850) 681-6788 (phone)  
(850) 681-6515 (fax)

Thank you for your assistance in this matter.

Sincerely,



William B. Willingham

WBW/rl



RECEIVED

NOV 19 1997

FPSC - Records/Reporting

November 18, 1997

Blanca Bayó, Director  
Division of Records and Reporting  
Florida Public Service Commission  
2540 Shumard Oak Blvd.  
Tallahassee, FL 32399-0850

Re: Docket Nos. 971004; 971005; 971006; 971007  
Numeric Conservation Goals

Dear Ms. Bayó:

LEAF requests that it continue to be listed as an interested party and receive mailings related to the above-referenced docket in a timely manner. Thank you.

Sincerely,

A handwritten signature in cursive script that reads "Gail Kamaras".

Gail Kamaras, Director  
Energy Advocacy Program

M E M O R A N D U M

JANUARY 19, 1998

RECEIVED

JAN 20 1998

2:35  
FPSR - Records/Reporting

TO: DIVISION OF RECORDS AND REPORTING  
FROM: DIVISION OF LEGAL SERVICES (PAUGH)  
RE: DOCKET NO. 971006-EG - ADOPTION OF NUMERIC CONSERVATION  
GOALS BY GULF POWER COMPANY

98-0115-PCD-EG

Attached is an ORDER GRANTING INTERVENTION to be issued in the  
above referenced docket. (Number of pages in order - 2)

LJP/js  
Attachment  
cc: Division of Electric and Gas (Futrell)  
I:971006il.rve

See 1

faxed - 3/0.  
checked

LAW OFFICES

**McWhirter, Reeves, McGlothlin, Davidson, Rief & Bakas, P.A.**

100 NORTH TAMPA STREET, SUITE 2800

**TAMPA, FLORIDA 33602-5126**

MAILING ADDRESS: TAMPA

P.O. Box 3350, TAMPA, FLORIDA 33601-3350

TELEPHONE (813) 224-0866

FAX (813) 221-1854

CABLE GRANDLAW

PLEASE REPLY TO:  
**TALLAHASSEE**

TALLAHASSEE OFFICE

117 S. GADSDEN

TALLAHASSEE, FLORIDA 32301

TELEPHONE (850) 222-2525

FAX (850) 222-5606

**RECEIVED**

FEB 11 1998

FPSC - Records/Reporting

LYNWOOD F. ARNOLD, JR.  
JOHN W. BAKAS, JR.  
C. THOMAS DAVIDSON  
STEPHEN O. DECKER  
LINDA E. JORGE  
VICKI GORDON KAUFMAN  
JOSEPH A. MCGLOTHLIN  
JOHN W. MCWHIRTER, JR.  
RICHARD W. REEVES  
FRANK J. RIEF, III  
DAVID W. STEEN  
PAUL A. STRASKE

February 9, 1998

Blanca S. Bayo, Director  
Division of Records and Reporting  
Gunter Building  
2540 Shumard Oak Boulevard  
Tallahassee, Florida 32399-0870

Re: Docket Nos. 971004-EG, 971005-EG, 971006-EG & 971007-EG

Dear Ms. Bayo:

It has come to my attention that in the above dockets Mr. John McWhirter was inadvertently omitted as counsel of record for the Florida Industrial Power Users Group (FIPUG). Please correct your records to indicate that all notices, orders, pleadings and filings in these dockets should be sent to:

John W. McWhirter, Jr.  
McWhirter, Reeves, McGlothlin,  
Davidson, Rief & Bakas, P.A.  
Post Office Box 3350  
Tampa, Florida 33601

Joseph A. McGlothlin  
Vicki Gordon Kaufman  
McWhirter, Reeves, McGlothlin,  
Davidson, Rief & Bakas, P.A.  
117 South Gadsden Street  
Tallahassee, Florida 32301

Thank you for your assistance. Please contact me if you have any questions.

Sincerely,

*Vicki Gordon Kaufman*

Vicki Gordon Kaufman

VGK/pw

cc: Parties of Record

State of Florida

Susan F. Clark  
Commissioner



Gerald L. Gunter Building  
2540 Shumard Oak Boulevard  
Tallahassee, FL 32399-0850  
(904) 413-6040  
FAX (904) 413-6395

Public Service Commission

RECEIVED

FEB 24 1998

MEMORANDUM

FPSC - Records/Reporting

February 23, 1998

TO: BLANCA BAYO, DIRECTOR OF RECORDS AND REPORTING

FROM: KAY POSEY, COMMISSIONER CLARK'S OFFICE *KP*

RE: INTERCEPTED COMMUNICATION FROM INTERESTED PARTY RECEIVED  
IN DOCKET NOS. 971004-EG, 971005-EG, 971006-EG, AND  
971007-EG

---

This office has received the following correspondence. The correspondence has not been viewed or considered in any way by Commissioner Clark. Under the terms of the advisory opinion from the Commission on Ethics (issued July 24, 1991 as CEO 91-31-July 19, 1991), the following letter does not constitute an ex parte communication by virtue of the fact that it was not shown to the Commissioner. Because it is not deemed to be an ex parte communication, it does not require dissemination to parties pursuant to the provisions of section 350.042, Florida Statutes. However, in such cases Commissioner Clark has requested that a copy of the correspondence and this memo be, as a matter of routine, placed in the correspondence side of the file in this docket.

Attachment



# Project for an Energy Efficient Florida

707 East Park Avenue • Tallahassee, Florida 32301 • (904) 222-0808

RECEIVED

FEB 12 1998

Florida Public Service Comm.  
Commissioner Clark

February 11, 1998

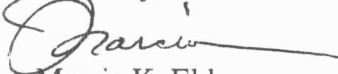
TO: Mark Futrell and Leslie Paugh  
Florida Public Service Commission

RE: **Conservation Goals Docket**  
971004-EG, 971005-EG, 971006-EG, 971007-EG

As a follow-up to our earlier-provided statement of organizations calling for strong numeric utility Conservation Goals, the Florida Catholic Conference has asked that we advise you of their strong endorsement as the most recent signatory to the statement (the latest version of which is enclosed). In their statement of support, the Conference notes that they have for some time had an interest in energy policy and recognize it as "a requirement for human life and health, and for life with dignity," for which reasons they "feel that access to it is a matter of justice" and wish to see that institutions involved with energy policy step up both education and conservation efforts. The Conference is undertaking a renewed initiative on environmental justice concerns, with a focus on "our societal obligation to not leave future generations with depleted natural resources or an unhealthy environment."

We are pleased to share with you the strong support of the Florida Catholic Conference, and will be back in touch as other organizations join in this important initiative. If we can be of assistance in any way in the meantime, we would welcome the opportunity.

Sincerely,

  
Marcia K. Elder  
Director

Attachment

cc: Chair Julia Johnson  
Commissioner J. Terry Deason  
Commissioner Susan F. Clark  
Commissioner E. Leon Jacobs  
Commissioner Joe A. Garcia



## Public Service Commission Conservation Goals Docket

The Florida Legislature exercised significant leadership and vision through its enactment of the Florida Energy Efficiency and Conservation Act. The Act charges the Public Service Commission with adopting conservation goals for Florida's electric utilities and calls on the utilities to develop conservation programs that will achieve those goals. The undersigned organizations wish to urge the Commission, through its recently opened docket on the Conservation Goals, to adopt strong numeric goals that compel Florida utilities to undertake meaningful, aggressive initiatives for energy efficiency and renewable energy resource use. For Florida's energy, environmental and economic needs to truly be met, and with our longer-term future in mind, we must go well beyond the status quo by making a timely transition to sustainable energy choices. Our organizations are committed to assuring that this occurs.

AMERICAN PLANNING ASSOCIATION,  
FLORIDA CHAPTER  
PROJECT FOR AN ENERGY EFFICIENT  
FLORIDA

AMERICAN ASSOCIATION  
OF RETIRED PERSONS

FLORIDA CONSUMER ACTION  
NETWORK

LEGAL ENVIRONMENTAL  
ASSISTANCE FOUNDATION

LEAGUE OF WOMEN VOTERS  
OF FLORIDA

COMMON CAUSE OF FLORIDA

FLORIDA PUBLIC INTEREST  
RESEARCH GROUP

SIERRA CLUB, FLORIDA CHAPTER

FLORIDA HOUSING COALITION

FLORIDA LEAGUE  
OF CONSERVATION VOTERS

RAILS TO TRAILS CONSERVANCY  
FLORIDA FIELD OFFICE

CROSS CREEK INITIATIVE

PRESBYTARIANS  
FOR RESTORING CREATION

FUTURES GROUP  
OF PALM BEACH COUNTY

FLORIDA CATHOLIC  
CONFERENCE

FLORIDA DEFENDERS  
OF THE ENVIRONMENT

*Preliminary Signatories*

2/6/98



RECEIVED  
FLORIDA PUBLIC  
SERVICE COMMISSION  
98 JUN 26 AM 7:19  
MAIL ROOM

June 25, 1998

RECORDS AND  
REPORTING

RECEIVED-FPSC  
98 JUN 26 AM 10:58

Blanca Bayó, Director  
Division of Records and Reporting  
Florida Public Service Commission  
2540 Shumard Oak Blvd.  
Tallahassee, FL 32399-0850

Re: Docket No. 971004; 971005; 971006; 971007  
Energy Conservation Goals Review

Dear Ms. Bayó:

Pleased to be advised that LEAF has moved and requests that its address as listed in filings in the above docket be changed to:

1114 Thomasville Road, Suite E  
Tallahassee, FL 32303-6290

By copy of this letter, we are notifying all parties to this matter.

Sincerely,

*Gail Kamaras*

Gail Kamaras, Director  
Energy Advocacy Program

*A Public Interest Law Firm*

1115 NORTH GADSDEN STREET • TALLAHASSEE, FLORIDA • 32303-6327 • 904-681-2591 • FAX 904-224-1275 Recycled Paper

-----  
From: Mark Futrell  
To: Brad Martin  
Subject: DSM goals  
-----

===NOTE=====8/04/98=11:31am==  
Please add the DCA to the DSM goals  
dockets so they will receive the notices  
of meetings, agenda conferences, hearings,  
etc.

Docket Nos. 971004, 971005, 971006, 971007

Department of Community Affairs  
2555 Shumard Oak Boulevard  
Tallahassee, Florida 32399-2100

Telephone: 488-8466

Thanks for your help.

-----



# Public Service Commission

State of Florida

## -M-E-M-O-R-A-N-D-U-M-

**DATE:** October 27, 1998  
**TO:** Blanca Bayó, Director, Records and Reporting  
**FROM:** Joy Kelly, Chief, Bureau of Reporting  
**RE:** ITEMS 6, 7, 13, 13A AND 13B OF 10-6-98 AGENDA CONFERENCE

DOCUMENT NO. Item 6, Docket No. 980864-EI, 11890, 10-26-98,  
Item 7, Docket No. 980896-GU, 11889, 10-26-98  
Item 13, Docket Nos. 971004-EG, 971005-EG, 971006-EG and  
971007-GU, 11888, 10-26-98,  
Items 13A and 13B, 980283-EQ and 980509-EQ, 11887, 10-26-98

The transcript for the above transcribed hearing has been completed and is forwarded for placement in the docket file, including attachments.

Please note that Staff distribution of this transcript was made to:

LEGAL, AFAD, CMU, SOLD

Acknowledged by:

A handwritten signature, likely of Joy Kelly, written over a horizontal line.

JK/pc

PSC/RAR 28 (Rev7/94)

*placed with docket # 980864*

One Energy Place  
Pensacola, Florida 32520

850.444.6111

RECEIVED  
FLORIDA PUBLIC  
SERVICE COMMISSION

98 NOV -6 AM 9:45

MAIL ROOM

**GULF  
POWER**  
A SOUTHERN COMPANY

Done

11/18/98

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9300885

960789

971006

980091

980643

981346

981591

981594

RECORDS AND  
REPORTING

98 NOV 16 AM 10:58

RECEIVED-PPSC

November 11, 1998

Ms. Blanca S. Bayo, Director  
Division of Records and Reporting  
Florida Public Service Commission  
2540 Shumard Oak Boulevard  
Tallahassee FL 32399-0870

Dear Ms. Bayo:

This is to inform you that Susan D. Cranmer has changed her name to Susan D. Ritenour. Please make the change on your correspondence for Gulf Power Company.

Sincerely,

*Linda G. Malone*

Linda G. Malone  
Assistant Secretary and Assistant Treasurer

lw

cc: Florida Public Service Commission  
All Division Heads

State of Florida

Susan F. Clark  
Commissioner



Capital Circle Office Center  
2540 Shumard Oak Boulevard  
Tallahassee, FL 32399-0850  
(850) 413-6040  
Fax: (850) 413-6395

## Public Service Commission

### MEMORANDUM

November 23, 1998

TO: BLANCA BAYO, DIRECTOR OF RECORDS AND REPORTING

FROM: KAY POSEY, COMMISSIONER CLARK'S OFFICE *KP*

RE: INTERCEPTED COMMUNICATION FROM INTERESTED PARTY RECEIVED  
IN DOCKET NOS. 971004-EG, 971005-EG, 971006-EG AND  
971007-EG

---

This office has received the following correspondence. The correspondence has not been viewed or considered in any way by Commissioner Clark. Under the terms of the advisory opinion from the Commission on Ethics (issued July 24, 1991 as CEO 91-31-July 19, 1991), the following letter does not constitute an ex parte communication by virtue of the fact that it was not shown to the Commissioner. Because it is not deemed to be an ex parte communication, it does not require dissemination to parties pursuant to the provisions of section 350.042, Florida Statutes. However, in such cases Commissioner Clark has requested that a copy of the correspondence and this memo be, as a matter of routine, placed in the correspondence side of the file in this docket.

Attachment



November 5, 1998

**BOARD OF DIRECTORS**

Mary Sorge  
**Chairperson**  
Jacksonville

Mark Hendrickson  
**Vice Chairperson**  
Tallahassee

Gregg Schwartz  
**Treasurer**  
Clearwater

Melvin Philpot  
**Secretary**  
Winter Park

Dan Horvath  
**Past Chairperson**  
Pensacola

Jaimie Ross  
**Counsel**  
Tallahassee

Jeff Bagwell  
Lakeland

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Miami

Howie Carroll  
Tampa

Gus Dominguez  
Miami

James Dyal  
Tampa

Carolyn Ford  
Gretna

Rob Ippolito  
Tallahassee

Jeffrey Kiss  
Winter Park

Jerry Kolo  
Fort Lauderdale

Greg Mihalic  
Naples

Kristen Packard  
Jacksonville

Tei Simmerman  
Cocoa

Archie West  
Tampa

**EXECUTIVE DIRECTOR**  
Tracy D. Suber

The Honorable Susan Clark, Commissioner  
Florida Public Service Commission  
2540 Shumard Oak Boulevard  
Tallahassee, Florida 32399-0850

Dear Commissioner Clark:

I am writing to bring you up to date on the Florida Housing Coalition's work addressing affordable, energy efficient housing and also to suggest ways that the PSC can encourage partnerships between utility companies and housing groups to best serve the needs of low income utility customers. The Coalition has met with individual commissioners in the past to discuss issues relating to low income Floridians who receive services from both affordable housing programs and utility companies. Most recently, we met with Commissioner Leon Jacobs to inform him about our current energy initiative.

***The Coalition's Mission and Energy Initiative***

The mission of the Florida Housing Coalition is to bring together housing advocates and resources so that all Floridians have safe, affordable homes. Energy efficiency plays an important part in making housing affordable. Although the utility bill is an unavoidable monthly expense like the rent or mortgage payment, the condition of some housing produces exorbitant, unmanageable utility bills for low income families. Affordable housing programs across the state help address this problem. A monthly utility bill savings of even \$10 makes a significant difference for the budgets of low income Floridians.

In April, the Coalition began a one year energy contract with the Florida Energy Office located at the Department of Community Affairs. This initiative and its initial findings are detailed in the enclosed copy of the Coalition's latest journal. The goal of this contract is to make recommendations to state policy makers to optimize the use of energy efficiency improvements as a tool to increase housing affordability. We are completing an inventory of the extent to which energy efficiency is currently addressed in Florida's affordable housing programs. The Coalition will complete its contract in April 1999 by submitting recommendations on possible next steps toward enhancing the role of energy efficiency in these housing programs. The Public Service Commission will be invited to participate in the stakeholders meeting that the Coalition will convene in March, 1999, to consider these recommendations.

In interviews with more than 100 affordable housing professionals across the state, the Coalition's staff have uncovered several examples where housing groups benefit from partnerships with utility companies. Some routinely link utility DSM program rebates for attic insulation, air conditioners, and other measures with the housing repair services they offer low income homeowners. For example, one homeowner in south Florida received house

1367 East Lafayette Street, Suite C, Tallahassee, Florida 32301 ♦ Phone: (850) 878-4219 ♦ Fax: (850) 942-6312  
Web site: <http://www.nettally.com/fhc> ♦ E-mail: [fhc@nettally.com](mailto:fhc@nettally.com)



repairs from a housing group and the local utility company that resulted in a \$20 a month savings on the utility bill. This partnership helps housing groups offset the cost for providing their services while also helping utility companies provide service to the lowest income customers.

***Suggestions for the PSC***

There are two ways that the PSC can encourage more mutually beneficial partnerships between utility companies and housing groups:

- During the upcoming Conservation Goals Hearings, consider increasing the number of services and rebates that can be incorporated into DSM programs. Energy conservation education, energy audits or whole-house ratings, and rebate incentives are helpful resources for low income customers.
- Encourage each utility company to increase program participation among low income customers by developing an initiative to reach out to this customer segment.

Regarding this second action, the Coalition has worked together with Florida Power Corporation (FPC) to develop a program linking DSM programs with the services of Weatherization Assistance Program groups in its service area. The program has helped FPC increase the participation of low income customers in its DSM programs. Tampa Electric Company (TECO) is currently developing a similar program. In addition, low income customers benefit from utility programs that provide bill assistance. Florida Power Corporation's Energy Neighbor fund serves as a good example. It's shareholders have contributed \$250,000 (a significant portion of the program's \$442,000 budget this year) to help customers pay their monthly bills and avoid utility disconnections.

The Coalition appreciates the attention the PSC has given to this issue in the past and looks forward to working with the Commission to ensure that the needs of low income Floridians are effectively addressed.

Very truly yours,



Tracy D. Super  
Executive Director

enc: Coalition journal

cc: Chairperson Julia Johnson  
Commissioner Leon Jacobs  
Commissioner Terry Deason  
Commissioner Joe Garcia

# RESOURCES

## Public Funding

Funding is available for Community Planning and Development, Public and Indian Housing, Housing and Lead Hazard Control programs. Applications are due September 1. For more information contact local Office of Native American Programs. See Federal Register 6/1 pp. 29823-29826.

### Service Coordinator

HUD funding is available for a service coordinator to help residents of Section 515, 8, 202, 221(d)(3) and 236 housing developments obtain supportive services from the community. See [http://www.access.gpo.gov/su\\_docs/aces/aces140.html](http://www.access.gpo.gov/su_docs/aces/aces140.html) Federal Register 5/29, pp. 29489-29493. For application kits or more information, contact the <http://www.hud.gov> Multifamily Clearinghouse or call 800/685-8470.

## Private Funding

### Affordable Housing

The Federal Home Loan Bank of Atlanta has announced the 1998 offering schedule for its "new" Affordable Housing Program. There are two offering periods, with the last deadline falling on September 15, 1998. For more information, call 800/536-9650, ext. 8436.

### AmeriCorps Funding

The Corporation for National and Community Service is offering new and renewal funding for AmeriCorps program grants. For more information, see [http://www.access.gpo.gov/su\\_docs/aces/aces140.html](http://www.access.gpo.gov/su_docs/aces/aces140.html) Federal Register 11/28, pp. 63318-63319 or call the Corporation at 202/606-5000, ext. 125.

### Florida Community Loan Fund

The Florida Community Loan Fund, through the Florida Community Development Initiative, provides low-interest loans and technical assistance to qualified community-based organizations in Florida that specialize in working to improve housing and economic conditions in their communities. The Loan Fund lends to qualified non-profit, 501(c)(3) organizations which have a strong community base and serve low-income communities within Florida.

The mission of the organization must involve low-income housing, economic development or social services. Loans are available in the amounts of \$5,000 to \$100,000 and technical assistance is provided for borrowers and potential borrowers by the Florida Housing Coalition. For more information, contact the Florida Community Loan Fund, P.O. Box 22332, St. Petersburg, FL 33742 or phone 813/578-2030.

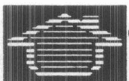
### Long-term Economic Development

The Hitachi Foundation offers grants for long-term economic development of low-income communities. Hitachi typically looks for programs involving partnerships of one or more businesses working closely with nonprofit groups. For grant application and information, send a self-addressed envelope to Hitachi Foundation, 1509 22nd St. N.W., Washington, DC 20037-1073.

### Rural Housing Loan Fund

The Southeast Rural Community Assistance Project offers loans for low income single family and multi-family housing projects in the rural Southeast U.S. for predevelopment studies/plans, acquisition costs, on-site/off-site improvements, infrastructure development, new or rehabilitation construction, and cost overruns or gap funds. Eligible borrowers include nonprofits, local governments and user associations. Eligible projects serve populations of 10,000 or less with a 30 percent threshold of low-to-moderate income residents. Applications are accepted throughout the year and are acted upon within 60-90 days of receipt. For an information/application packet, contact the Loan Fund at P.O. Box 2868, Roanoke, VA 24001-2868 or phone 540/345-1184 or fax 540/342-2932.

*For a more complete list of housing related publications, resources and upcoming events, visit  
<http://www.nettally.com/fhc>.*



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We wish to acknowledge and thank the following organizations and individuals for their commitment to improving housing conditions in the state of Florida.

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Partners for Better Housing Membership is for those who wish to support the work of the Florida Housing Coalition by making a tax deductible donation of \$500 or more. Partners for Better Housing members receive subscriptions to *Housing News Network* and unlimited membership rates for registration at our conference for themselves and any of their associates who are interested in affordable housing issues. They will also receive recognition at the conference, in all conference-related publications, and in each issue of *Housing News Network*.

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- |  |                                |
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SUMMER 1998

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## Florida Housing Coalition's Mission

Energy customers often seem reluctant to look seriously at the savings that can be realized for mere pennies. Education is of the utmost importance and should be available for all consumers regardless of income. Energy savings can be the determining factor as to whether the house is affordable and within the potential buyer's purchasing ability. It is important to let people know that by considering energy efficiency measures they can further the opportunity to realize their dream of homeownership. This need to educate about energy issues and affordability aligns perfectly with the Coalition's mission.

### History of FHC's Energy Focus

The Coalition has demonstrated its longstanding commitment to energy-efficient housing. Michele Hartson, the previous executive director, has integrated energy efficiency into her affordable housing work since 1983 and was an integral part in the creation of the partnership model now known as FloridaFix. During the Coalition's 1996 energy contract with the Department of Community Affairs (DCA), the Coalition's Energy Program Coordinator, Michael Chaney, assisted weatherization groups in the development of partnerships with SHIP and HOME programs, utility companies, and other local housing-related groups. Michele and Michael have presented workshops on housing and energy issues at two national energy conferences, two state housing conferences, and several regional training sessions across Florida.

The Coalition's emphasis on energy issues is further illustrated by the goal adopted in its strategic three year plan to ensure that energy efficiency is regularly incorporated into all of the training and technical assistance it provides.

Because of this focus on energy, the Coalition found it valuable to have people who are experienced in energy issues as members of the Coalition Board of Directors. The author and Melvin Philpot, the conservation program coordinator for Florida's second largest utility company, Florida Power Corporation, both serve on the Coalition's Board. (See more information on these members of the Board in the article on page 8.)

### Current Energy Initiative

The Coalition is now working under contract with the Florida Energy Office, the Department of Community Affairs to provide a status report on what energy issues are currently addressed in housing programs. Florida has pioneered successful programs for both affordable housing and energy efficient housing, but there is often little coordination between these initiatives. This current contract will also identify potential linkages between energy and housing programs. Michael Chaney's article on page 7 elaborates on the objective of this initiative and preliminary results.

### Changes to FHFC Rental Application

Recently, Board of Directors member Jaimie Ross advocated improvements to the process for encouraging energy efficiency in the Florida Housing Finance Corporation's (FHFC) combined rental cycle application. Her recommendations added a number of specific energy features that can increase the affordability of rental housing. She also suggested revisions that permit the inclusion of specific energy efficiency measures based on the differing climatic conditions throughout Florida. (For details about these recommendations, refer to the sidebar article on page 6.)

better. Oversized air conditioners cost a housing program more, are unable to properly remove indoor moisture, and cannot operate to their cost-effective potential. A recent survey of air conditioning contractors by the Florida Solar Energy Center indicates that one third of them do not use the "Manual J" or software programs that will help properly calculate equipment size, especially for existing houses. Almost half of the survey respondents also admitted that they have intentionally oversized equipment to "avoid call backs" or to achieve cooler temperatures. Housing administrators should specify in their work orders that contractors must provide a written copy of the calculations

(the completed Manual J) used to determine the load and size of cooling and heating equipment. This may save a housing program up to \$1000 per home - money that can be spent on additional repairs and energy improvements.

### New Construction

The Lee County Community Development Corporation builds and sells new single family homes. For its infill projects, the nonprofit has participated in Florida Power and Light's "Build Smart" program. Although FPL offers no rebates to offset the cost of energy improvements, the utility company's





to repairing flooring, plumbing, electrical wiring, and roofs, HOPE 3 invests in several energy-related features. Lee County has reduced the cost of its energy repairs by using rebates offered by Florida Power and Light for highly efficient air conditioners, tinted windows, repair of air conditioning ducts, and attic insulation. Similar rebates are offered by Florida Power Corporation, the Tampa Electric Company, Gulf Power, and several municipal utilities. The costs and utility bills of two rehab houses are outlined and explained below.

#### House #1

| Energy Feature                       | Cost          | FPL Rebate   |
|--------------------------------------|---------------|--------------|
| One tinted window on south wall      | \$30          | \$10         |
| Repair of leaky air conditioner duct | \$250         | \$180        |
| Replacement of water heater          | \$350         |              |
| Air conditioning tune-up             | \$75          |              |
| <u>R-30 attic insulation</u>         | <u>\$320</u>  | <u>\$90</u>  |
| <b>TOTAL</b>                         | <b>\$1025</b> | <b>\$280</b> |

ENERGY IMPROVEMENT COSTS: \$745

MONTHLY UTILITY BILL: \$40 in months without air conditioner, \$95 with air conditioner

#### House #2

| Energy Feature                              | Cost          | FPL Rebate   |
|---|---------------|--------------|
| Installation of tinted windows              | \$300         | \$180        |
| 4 Ceiling fans/lights                       | \$600         |              |
| Replacement of water heater                 | \$350         |              |
| Air conditioning tune-up                    | \$75          |              |
| <u>Repair of leaky air conditioner duct</u> | <u>\$650</u>  | <u>\$200</u> |
| <b>TOTAL</b>                                | <b>\$1975</b> | <b>\$380</b> |

ENERGY IMPROVEMENT COSTS: \$1595

MONTHLY UTILITY BILL: \$30 in months without air conditioner, \$75 with air conditioner

Although the utility bill records before rehabilitation were unavailable for these houses, the Florida Solar Energy Center estimates that the original bills with air conditioning were \$117 in House #1 and \$93 in House #2. Floyd Greenwell from Florida Power and Light notes that the houses' current utility bills are very affordable for rehabilitated

existing housing. Mr. Greenwell coordinated FPL's rebates for these houses. He explains that the energy improvements have significantly increased their utility affordability when compared with their previous condition.

These examples illustrate the effectiveness of several energy features. Other improvements can also increase energy affordability. Air sealing the building envelop prevents moisture problems and keeps conditioned air inside the house. Window and door replacement helps seal the envelope while general caulking and weatherstripping around pipes and wires that pass through walls will further tighten the house. Overhangs, awnings, and glazed windows keep direct sunlight off windows and walls, especially east and west walls, which receive a majority of radiant heat from the sun. This can be achieved by improving attic ventilation with ridge vents which cool off attic space and keep the housing interior comfortable. Heat recovery units are effective in houses with many occupants. The units can reduce water heating costs by 30 percent or more when a heat pump is cooling the house. This \$600 device connects the water heater and heat pump to heat water with the "waste heat" removed from air as it is chilled and blown into the house.

Finally, heating and cooling costs must be addressed. According to Florida Power Corporation, these costs comprise 40 percent or more of a typical electric bill in Florida. Housing rehabilitation beneficiaries have a wide variety of incomes. Homeowners on limited incomes often have one wall unit air conditioner to cool a single room rather than increase their utility bill with a central system. Families with two or three inefficient wall units operating frequently will realize a cost savings by converting to an efficient central system. It is common to find central air conditioners in houses to be rehabilitated that are more than 10 years old. These systems, often close to the end of useful life and operating extremely inefficiently, are a major contributor to high utility bills. The installation of highly efficient SEER 12 air conditioners is recommended. They reduce heating and cooling costs by 20 to 40 percent compared with minimum standard SEER 10 systems while costing an additional \$300-500 for an average sized home. Some of this cost can be recaptured through utility company rebates of \$200 or more.

The proper sizing of new air conditioning equipment is also important. Studies have revealed that up to half of residential homes have oversized air conditioners. This is one instance where bigger is not



anticipated energy cost savings will determine if the expense for energy features is justified by their benefits.

There is also a low tech alternative for confirming the effectiveness of energy improvements. After energy improvements have been installed in a number of existing houses, review the utility bill history of the houses before and after repairs. A utility company representative can help determine the impact of energy efficiency on the bills and can suggest any needed adjustments or improvements to the approach.

## **Financing Energy Improvements**

### **Government Programs**

SHIP, HOME, CDBG and other housing funds are commonly used for energy improvements like attic insulation, weatherstripping and window replacement. The Weatherization Assistance Program (WAP) is another source of funds. WAP devotes dollars from the Department of Energy, the Low Income Home Energy Assistance Program, and state funds solely to energy-related improvements. These include window and door replacement, insulation, air sealing, water heater replacement and more. See Michael Chaney's article on page 7 for more details on how different communities finance energy features with housing dollars and coordinate with their local WAP provider.

### **Utility Company Programs**

In addition to housing dollars, utility companies also have resources to pay for energy efficiency. As mentioned earlier, the state's four privately owned utility companies and several municipal utilities offer rebates to help pay for energy improvements. The rebates are one of several "Demand Side Management" (DSM) programs offered by the utilities to reduce some energy demand to avoid the costly production of new power plants. Load management is another DSM program offered by many utility companies. It is an excellent resource for low income homeowners that can reduce their utility bills. Homeowners participating in the load management program receive monthly bill credits of \$6 or more for agreeing to have their air conditioner and water heater temporarily turned off during infrequent

periods of heavy energy demand. Housing administrators may wish to partner with utility companies to help educate families about the availability of programs.

### **Energy Efficient Mortgages**

Private lenders are increasingly offering Energy Efficiency Mortgage (EEM) products to help finance energy improvements. Some EEM programs lend home buyers more money than traditionally allowed under debt to income ratios when they purchase a highly energy efficient house. For these EEMs, it is acknowledged that the house's lower utility bills will more than make up for a higher mortgage payment. Other EEMs are mortgage/construction loans that lend dollars above the purchase price of the house to be used for energy improvements to a house. Most recently, Fannie Mae is strongly considering offering its EEM pilot product in Florida. This support from the secondary market could encourage more lenders to help finance energy efficiency.

Similar to Energy Efficiency Mortgages, the Environmental Protection Agency's Energy Star program also has financing incentives associated with it. In Florida, a certified Energy Star home is a newly constructed dwelling that includes several energy features that increase its efficiency to a level 30 percent higher than required by the state's energy code. Some lenders are offering incentives for the purchase of these certified highly efficient homes. Norwest Mortgage, for example, offers a \$500 reduction in closing costs to homebuyers. Call Rob Vieira at the Florida Solar Energy Center for additional details, (407) 638-1000.

## **11TH Annual Conference to Feature Energy Affordability Initiatives**

The Florida Housing Coalition's Conference is recognized for bringing the leading edge in housing affordability issues to Florida's housing professionals. Further training and discussion on energy related issues will take place at a special session (Friday, October 16) at the FHC's 11TH annual conference. Tentative topics for training include:

- "Energy as a Key to Affordability," a presentation with case studies demonstrating the costs and benefits of energy improvements in new construction, rehabilitation, and rental units;



field staff offered the nonprofit free inspection services, including three house inspections during different stages of construction, duct tests, and energy code compliance calculations (FPL now charges for these services). The CDC's *Build Smart* homes include a number of features that make them more efficient than required by Florida's Energy Code and qualify them for an Energy Star certification. The features included in these 1300 square foot homes are:

| Energy Feature                           | Cost Range                                  |
|--|---|
| Ceiling Fans                             | \$280-320                                   |
| Completely sealed air conditioning ducts | \$100-200                                   |
| Heat Recovery System                     | \$450 when installed with air conditioner   |
| 2-2.5 ton SEER 12 air conditioner        | \$300-400 more than minimum standard        |
| <u>R-30 attic insulation</u>             | <u>\$150-200 more than minimum standard</u> |
| <b>Total Energy Improvement Cost</b>     | <b>\$1280-1570</b>                          |

**MONTHLY UTILITY BILL:** \$80 with air conditioning. This represents an average of \$35-40 of monthly savings when compared to new construction built to minimum code.

New homes built in Florida already meet a high level of energy efficiency. The Florida Energy Code is commonly regarded as one of the most comprehensive and effective codes in the country. As demonstrated in Lee County, however, it is still possible to increase energy efficiency in affordability cost range. As mentioned above, blocking direct sunlight on windows and walls, installing glazed windows, and choosing light colored roofing shingles will reduce the difficulty of maintaining comfort indoors. Properly sizing air conditioners is also essential. Finally, it is often assumed that newly installed air conditioning ducts are leak-free. According to research from Florida Power and Light, however, not all contractors are meticulous in their installations, and may permit a leakage rate of up to 10 percent. It is often cost effective to test for leaks and fully seal ducts with mastic.

It is often helpful to consider a list of energy features like those mentioned above that are generally considered effective in Florida's climates. These features can help improve the affordability of housing. A list of features is not enough by itself to fully address energy efficiency, however. The industry is moving to a new standard, one that considers the house as a system.

## The House as a System

Considering the building as a whole system is key to ensuring that energy efficiency actually lowers total housing costs. Each energy improvement is influenced by all the others that are installed in a house. A highly efficient air conditioner, for example, operates most cost effectively once leaky walls are sealed and the house is insulated from outside temperatures. Although it is helpful to list

the many features that can increase energy affordability, a systematic, integrated method is needed to prioritize the cost effectiveness of energy

improvements when limited funds are available.

The Energy Gauge energy rating system (Energy Gauge) can help. By assessing the whole house as a system with interrelated energy features, Energy Gauge ensures that each dollar devoted to energy efficiency is most wisely invested. It provides a computerized and customized analysis of a house and recommends a prioritized list of the most cost effective energy improvements that can be installed. The cost of a rating is between \$100 and \$250 and is available for new construction and existing housing. Rating costs can be reduced by encouraging your local housing inspector or contractor to become a certified rater. [Contact the author at the Florida Solar Energy Center at (407) 638-1437 for a list of raters in your area or information about rating certification.]

## Estimating Cost Savings

How do you know that the energy improvements to a house will ultimately result in lowered utility bills? This is the bottom line question. Energy Gauge creates a computerized model of a house to estimate its annual energy costs before and after energy improvements are added. Using this model, a certified energy rater can test a variety of energy improvement packages to a house before any actual repairs are made. The rater can instruct the Energy Gauge software to maximize the cost savings for a set budget of \$500 or \$1000 of energy improvements, for example. A review of this





# The Goal of Affordable Utility Bills

## The Florida Housing Coalition's Energy Initiative

by Michael Chaney



**T**he Florida Housing Coalition has a goal of ensuring that energy efficiency is considered as a tool for increasing the affordability of every housing unit receiving public funds in the state. As an initial step toward this goal, the Coalition initiated a proposal to the Florida

Energy Office to review Florida's affordable housing programs and assess how each incorporates energy efficiency measures into housing. The Coalition will also compile information on energy-related resources available to housing professionals, a list of barriers that hinder attention on energy efficiency, and innovative ideas for lowering housing costs through energy savings. The objective: to develop a "status report" on the role energy efficiency plays in Florida's affordable housing programs. This is a first step toward optimizing energy efficiency as a tool for housing affordability. As a final component of this project, the Coalition will develop recommendations for further action by the Department of Community Affairs, the Florida Housing Finance Corporation, the Coalition, the Affordable Housing Study Commission, and other groups interested in affordable housing in Florida. This article describes the methodology, the expected and preliminary results of this initiative, and how these results will be applied in future projects.

### Methodology

As reported in the Spring 1998 *Housing News Network* journal, the Coalition is in the process of talking to its members in an effort to compile this status report. Interviews are being conducted with state and local housing administrators working with SHIP, CDBG, HOME, SAIL, the Weatherization Assistance Program, and other funding sources at the Florida Housing Finance Corporation and the Department of Community Affairs. Contacts are

being made with community-based nonprofit staff, developers, home builders, and the respective state and national associations. Also, contacts are scheduled with professionals working in energy-related programs, including the Energy Star program, the Energy Gauge energy rating program, Energy Efficiency Mortgages, the Florida Energy Office, the Florida Solar Energy Center and utility company conservation programs.

Interviews are being conducted with individuals during on-site visits, workshops, the annual conference and through an extensive telephone survey. A statistical analysis of the information provided in these interviews will identify common energy improvement practices and barriers to addressing energy efficiency. In addition, information on energy initiatives, building practices and low-cost energy features from two national energy conferences will be added to the report.

### Expected Results

Our survey is beginning to provide a clear picture of how energy efficiency is specifically addressed in each community's purchase assistance and rehabilitation programs. Compiling this information and will help inform future energy training. The successfully implemented features adopted in several communities will be highlighted. Empirical analyses will be performed on houses before and after energy improvements have been installed to demonstrate the benefits of energy efficiency. Some interviews provide excellent case studies that illustrate the costs and the savings of many innovative energy improvements.

### Preliminary Results

The Coalition's energy project will also look for new linkages between programs. Our preliminary work has already identified such linkages. Lakeland's utility company, for example, has initiated a pilot program to install utility-owned and maintained solar water heaters that could be used in the city's housing programs.

*Continued on page 15*



- An overview of energy design in single family construction - passive solar design, attention on air sealing and central heat and air;

- Reviewing utility restructuring: What is in store for Florida? How will this help or hurt the low income residential customers?

Several groups will contribute to the content of this energy training, including the Florida Solar Energy Center, Florida Power Corporation, the Department of Community Affairs, the Public Service Commission, the Pinellas County Urban League, Oak Ridge National Laboratory, South Face Energy Institute, and staff from the Florida House in Sarasota.

### In Summary

The mission of the FHC is to act as a catalyst to bring together housing advocates and resources so that all Floridians have a safe and affordable home and suitable living environment. Because energy efficiency directly affects the affordability of homes for Floridians, it should be applied to increase affordable housing opportunities.

This article was written to provide practical information on the implementation of energy efficiency as a tool for increased housing affordability. The results of current research and interviews with housing administrators across Florida will also yield the data necessary to encourage more attention on energy issues. This discussion will continue at the annual conference - a forum which could prove to be the networking opportunity of the year, in Florida, for housing professionals. ■

## Energy Efficiency, A Win-Win Choice

Energy-efficient housing is a powerful means to make housing more affordable for low-income households. It can sometimes make the critical difference between paying the utility bill or putting food on the table.

Housing Credit, SAIL and HOME Rental Programs Application offers points for selection of energy efficient features including the following, which were recommended by FHC Board of Director member Jaimie Ross:

SEER 12 Heat Pump, or SEER 11 or 12 air conditioner with electric resistance heat in south Florida - these items deal with heating and cooling. Different climates in Florida can be adjusted for by separating these features on the checklist. Developers can then choose a heat pump versus an air conditioner with electric strip heat based on the number of heating days they experience in their area.

Ducts in conditioned space - This item was recommended to be added to the checklist since it provides an effective, low cost feature to attain energy savings. Even newly installed duct systems leak. This item ensures that the central heating/cooling system will deliver conditioned air inside the apartment unit despite any leaks, rather than heating or cooling off the attic or the outdoors.

Attic insulation of R-30 - The additional insulation above R-19 required by code is cost effective in north, central and south Florida.

Light-color roofing shingles - Radiant heat from the sun beats down on Florida's residential roofs. This heat warms attics and ceilings to high temperatures and causes air conditioners to work harder to cool a housing unit. Replacing black shingles with a light or white color is a sensible energy feature that reduces heat emitted into a house.

Single-pane windows with shading coefficient of 0.67 - A shading glaze applied by the window manufacturer reduces the sun's conductive and radiant heat and reduces air conditioning costs. The added cost of approximately 50 cents per square foot delivers energy savings in all areas of Florida.

Window shading - One method for cutting energy costs is to ensure that direct sunlight does not reach the outside of the windows.

Shading for all windows in an apartment building can be achieved with an overhang on the top floor and balconies or ledges on other floors.

Gas water heater - In some areas, gas water heaters can provide a lower cost and efficient method for heating water.

Heat traps on the water heater - This low cost device is a looped pipe located right where the water heater connects to the hot and cold water pipes. It reduces heat loss from the water heater.

Ceiling fans - Ceiling fans circulate conditioned air to allow residents to remain comfortable while setting their air conditioner thermostat at a higher level.

Radiant barriers - FHC recommends that this item be removed from the current FHFC application. The costs and benefits of radiant barriers are less impressive than other features in multi-story apartment buildings where a majority of the apartment units are not connected to the roof.



## FLORIDA HOUSING COALITION

### Meet the Executive Director



Tracy D. Suber was selected as executive director of the Florida Housing Coalition in May and joined the Coalition on June 8. Tracy has served Florida's communities through state government for more than 16 years. Prior to her appointment with the Coalition, she worked at the Florida Housing Finance Corporation (formerly the Florida

Housing Finance Agency), where she administered both the Multifamily Bond Program and State Housing Initiatives Partnership (SHIP) Program. As the SHIP Administrator, she wrote and negotiated consensus for legislation to substantially revise the program based on evaluation of performance; the legislation was enacted in 1997.

Before joining the FHFA, she worked for the Florida Department of Community Affairs, Office of the Secretary, where she was the senior analyst responsible for long-range planning; assisted the development of policy related to housing, economic development, and growth management; and staffed gubernatorial commissions, including the Affordable Housing Study Commission in 1992-1993.

Tracy also brings special leadership abilities from her experience with volunteer work in the community and nonprofit board work. "The board's vision for the future of the organization is inspiring and the board's commitment to the people we serve in our mission is impressive. In my work in affordable housing during the past eight years, I have been consistently impressed by the caliber of people who serve the organization, both as board members and as staff. I am thrilled to be a part of the Florida Housing Coalition."

Tracy is a *magna cum laude* graduate of the Florida State University, with a Bachelor of Science in Social Studies.

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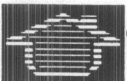
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## COALITION WELCOMES NEW BOARD MEMBERS

Four individuals were elected to serve on the Board of Directors during the May Board meeting.



**BARBARA BURNHAM** is senior program director for the Greater Miami Local Initiatives Support Corporation (LISC), which produces more than \$700,000 in capacity building grants to Miami-Dade County CDCs and nearly \$3 million in pre-development and gap financing for affordable housing and economic

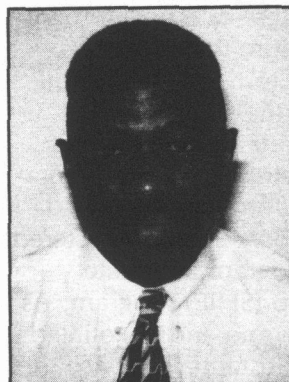
development ventures. She initiated restructuring of LISC's role in the Miami-Dade County community development environment including the establishment of a CDC capacity building program. Barbara has broad experience in planning and implementation of community housing, employment, education, and coalition building programs. Prior to her current position, she was executive director for the Fenway Community Development Corporation in Boston. She holds a Master of Urban Affairs with specialization in housing and community development, as well as a Master of Education.



**CAROLYN FORD** is founder and executive director of the North Florida Educational Development Corporation, a community-based development organization, where she is responsible for managing programs that include the Housing Development Project, Gadsden County HOME/SHIP Partnership, Rural Home Loan Partner-

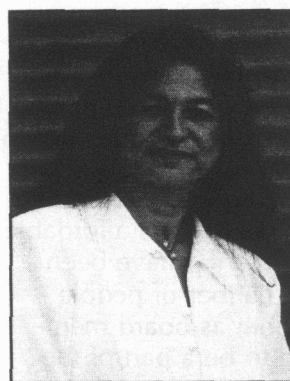
ship, Food Cooperative Program, YouthBuild Gadsden and Paul Roberson Performing Arts Program. Prior to founding the organization in 1986, she was a program supervisor for Apalachee Community Mental Health Service. She has also served as a social worker, university instructor, and ele-

mentary and junior high school teacher. Carolyn received a Master of Education from the Florida A&M University and a Specialist Degree in Counseling and Human Services from the Florida State University Department of Education.



**JERRY KOLO** is an associate professor at the Florida Atlantic University (FAU) Department of Urban and Regional Planning. He is also director of FAU's Center for Urban Redevelopment and Empowerment. Jerry is currently conducting a census of the homeless in Palm Beach County, and is also conducting a visioning

exercise for the Broward Boulevard Redevelopment Plan. He is a member of Enterprise Florida's Minority Business Advisory Board, the Fort Lauderdale CDC board of directors and the Broward County Affordable Housing Task Force. He holds a Ph.D. in Urban and Regional Planning from the University of Waterloo in Ontario, Canada.



**TEI SIMMERMAN** recently joined the staff of the Florida Solar Energy Center as the program coordinator for the Florida Energy Gauge energy audit. Her tasks include marketing EnGauge software to consumers, builders, Realtors, and mechanical systems professionals; and the training and certification

of new raters. Ms. Simmerman has more than 15 years experience in preparing residential and commercial energy calculations for builders. She is a certified Energy Gauge rater and a residential building contractor.



# Annual Conference—October 14-16, 1998

Program, creating loan pools for small business lending and job creation, and using banks to capitalize programs. A detailed discussion on incorporating WAGES legislation into a local program is planned. (Session repeated)

#### **4. Financing the Deal: Extra Sources, Extra Flexibility –**

Would a source of inexpensive, flexible financing make your life easier? Does your proposed development need another financing source in order to work? Come hear from the Florida Community Loan Fund and other potential sources that can help you meet your financing needs. (Offered once)

**5. A Mission of Faith –** Dozens of religious organizations are making an impact on affordable housing an community development in Florida. If your faith guides you to service through developing affordable housing, choose this session to hear from a panel of experienced housing professionals who are also guided by faith. Learn from their insights about available funding resources and what to expect from potential funders. (Offered once.)

#### **6. Guiding Principals Further Housing Choice for Special Needs –**

Affordable housing for special needs populations is covered by a panel of experts or practitioners. Partnership building with support providers and creative financing are highlighted along with planning and managing special needs housing. Learn how successful models apply the guiding principals of developing special needs housing to illustrate how housing programs can serve everyone who needs housing in a community. (Session repeated)

#### **7. Against the Odds: Disaster Mitigation and Response –**

Trite but true... we've learned that a community's development needs are best addressed when a holistic approach is applied. Learn how Florida's Long-term Disaster Recovery and Mitigation Strategy translated this theory into practice so that Florida's communities are ready for the next "big one." But what happens then? Learn how to respond to housing needs when the inevitable finally happens; a widely acclaimed response to Florida's worst-ever natural disaster by a community-based organization is highlighted in this session. (Session repeated)

**8. Homebuyer Training and Counseling –** This workshop focuses on housing counseling and homeownership training. Topics include credit counseling, family budgeting, purchasing a home, the mortgage underwriting process, and post-closing issues such as home maintenance. (Session repeated)

**9. Tools for Tackling NIMBYism –** This session will provide local governments and developers with useful information to address the difficulty of neighborhood resistance to affordable housing. The panel presentations will include the results of the National Media Advocacy Project of the National Low Income Housing Coalition to help participants garner support for affordable housing, as well as the do's and don'ts of public hearings and the legal tools including fair housing laws available to both local government and the development community in avoiding and overcoming NIMBY opposition. (Session repeated)

#### **10. Clear the Way to Successful Subdivisions and Infill Housing –**

You've read or witnessed how a housing development serves as a catalyst for neighborhood revitalization. This workshop will focus on the successful elements of subdivisions and infill housing development. Learn how to overcome barriers to these developments from practitioners who've made it happen. Topics include issues on land use and siting, infrastructure and predevelopment, project financing, and administering the project through local government processes. (Session repeated)

#### **11. Tricks of the Trade: Best Practices for Nonprofit Organizations –**

Learn how to keep your board informed about financial issues, how to keep your act together when your funder's may not be, how to work with other nonprofits to avoid cutthroat competition, and more. This three-hour workshop will focus on specific issues common to many nonprofits, housing developers or service providers. Come hear from nonprofit organizations that have addressed these issues creatively and effectively. (Offered once)

#### **12. Growing Wealth and Stability in Rural Florida –**

The contrasts are startling between Florida's urban and rural areas, but they share the common dilemma of the need for affordable housing. This session examines rural issues with an eye on funding and innovative ideas. Participate in the "Stand Up for Rural America" campaign that highlights rural needs and possibilities. Financing alternatives are explored through a look at rural banking consortiums, mortgage brokers, and LISC and HAC at work in rural areas. Farm worker housing supply and demand and current legislation on farm workers' rights is considered and discussed. Learn about infrastructure financing options - including new resources from the Florida Housing Finance Corporation - and job creation in rural areas and how this impacts affordable housing. (Offered once)



# Annual Conference—October 14-16, 1998

## "Housing Florida: Beyond Traditional Partnerships to Include the Lowest Income"

### 10 years of Rave Reviews

**W**ith its 11<sup>th</sup> annual statewide affordable housing conference, the Florida Housing Coalition continues its tradition of bringing you the leading edge in affordable housing development. This year the Coalition focuses on the impact of housing policy and affordable housing program delivery on people with the lowest incomes. The general sessions feature state and national leaders in community development speaking on the impacts of the federal devolution of responsibility for affordable housing and how community-based organizations rise to the challenge of delivering affordable housing.

**Spotlight on Devolution.** Barry Zigas, Executive Director of Fannie Mae's National Housing Impact Division, opens the conference with his perspective on responding to the changing federal role. Jill Khadduri, Director, Office of Policy Development Division of Policy Development Research, U.S. Department of Housing and Urban Development, delivers the luncheon keynote address with the national outlook.

**Florida leads the way...**the original statewide conference for housing professionals would not be complete without addresses from the Department of Community Affairs and the Florida Housing Finance Corporation on Florida's response to this changing federal role. We've also invited the 1998 gubernatorial candidates to share their visions for the future of affordable housing in Florida.

**Success is Contagious!** What's more inspirational than learning from those who made the dream of affordable housing a reality for those who need it? Take heart in the stories of success in delivering affordable housing...leave with the tools to get it done!

**Tools for Success.** Choose from an offering of 12 workshop topics – each described below. Sessions will be led by members of the Coalition's nationally recognized technical assistance team, including members of the Coalition's Board of Directors. You won't miss a topic because of scheduling conflicts. For your convenience, we've scheduled four workshop sessions and have repeated most topics (exceptions are noted to help you plan).

Additional information will be mailed in the registration packet soon. Watch your mail for more details!

### WORKSHOPS

**1. Meeting the Needs of the Lowest Income** is the part of this year's conference that best reflects the present direction of the Florida Housing Coalition. The Coalition's training and technical assistance on partnership development for affordable housing during the past decade has assured the successful implementation of home ownership programs for Florida's low income. But there is another group of Floridians for whom home ownership is not in the near future; Floridians who rely upon ongoing subsidy and public housing to meet their families' shelter needs. These Floridians are facing even greater challenges in the face of devolution and federal cutbacks. This session provides a three-hour forum for training on the status of public housing; welfare to work; housing preservation (mark to market); supportive housing; Florida's response to federal changes; and legislative advocacy for the poor. We have the good fortune to have Jill Khadduri, our keynote speaker on devolution from Washington D.C., to join the panel throughout the session. (Session repeated)

**2. After the Successful Application: Rental Finance and Credit Underwriting** – If developing a multifamily rental community or administering a rental finance program is in your future, this three-hour workshop is for you. Hear Coalition Board Members reprise their in-depth training conducted for the Affordable Housing Catalyst Program; learn what finance programs are available, how to effectively combine them, how to prepare cash-flow analyses and operating pro formulas, what to expect in credit underwriting, and how to select good financial partners. (Offered once.)

**3. Grow Small Businesses to Foster Economic Development** – This workshop will focus on neighborhood revitalization – including housing as an integral component – through small business lending. Topics include the Small Business Administration Microloan Program, Enterprise Florida's Microloan



**Florida Housing Coalition**  
**"Housing Florida: Beyond Traditional Partnerships to Include the Lowest Income"**  
October 14-16, 1998 ☐ Orlando Radisson Plaza Hotel

**Registration Form**

Please print

Complete a separate form for each person.

Name: \_\_\_\_\_ Title: \_\_\_\_\_

Organization: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_ E-mail: \_\_\_\_\_

**Workshops**

**Registration**

**Wednesday October 14**

**Workshop Session 1 (Select one)**

- ☐ 1. Meeting the Needs of the Lowest Income (Part 1)
- ☐ 2. After the Successful Application: Rental Finance and Credit Underwriting (Part 1)
- ☐ 3. Grow Small Businesses to Foster Economic Development
- ☐ 4. Financing the Deal: Extra Sources, Extra Flexibility
- ☐ 5. A Mission of Faith (Offered only once)
- ☐ 6. Guiding Principals Further Housing Choice for Special Needs

**Workshop Session 2 (Select one)**

- ☐ 1. Meeting the Needs of the Lowest Income (Part 2)
- ☐ 2. After the Successful Application: Rental Finance and Credit Underwriting (Part 2)
- ☐ 7. Against the Odds: Disaster Mitigation and Response  
Disaster Mitigation and Relief
- ☐ 8. Homebuyer Training and Counseling
- ☐ 9. Tools for Tackling NIMBYism
- ☐ 10. Clear the Way to Successful Subdivisions and Infill Housing

**Thursday October 15**

**Workshop Session 3 (Select one)**

- ☐ 1. Meeting the Needs of the Lowest Income (Part 1)
- ☐ 11. Tricks of the Trade: Best Practices for Nonprofits (Part 1)
- ☐ 7. Against the Odds: Disaster Mitigation and Response  
Disaster Mitigation and Relief
- ☐ 8. Homebuyer Training and Counseling
- ☐ 12 Growing Wealth and Stability in Rural Florida (Offered only once)
- ☐ 10. Clear the Way to Successful Subdivisions and Infill Housing

**Workshop Session 4 (Select one)**

- ☐ 1. Meeting the Needs of the Lowest Income (Part 2)
- ☐ 11. Tricks of the Trade: Best Practices for Nonprofits (Part 2)
- ☐ 3. Grow Small Businesses to Foster Economic Development
- ☐ 4. Financing the Deal: Extra Sources, Extra Flexibility  
Lending Consortiums
- ☐ 9. Tools for Tackling NIMBYism
- ☐ 6. Guiding Principals Further Housing Choice for Special Needs  
Housing Persons with Special Needs.

**Members Get a Reduced Rate!**

Please check your address label to verify your membership status. If you are not a member or your membership has expired, you may become a member or renew your membership at this time to take advantage of our member registration rate.

☐ **Member Rate \$250** \_\_\_\_\_

I'll Join or Renew!

- ☐ Individual Membership \$75
- ☐ Non-Profit Organization \$150
- ☐ Government Agency \$200
- ☐ Private Organization \$250 \_\_\_\_\_

☐ **Non-Member Rate \$350** \_\_\_\_\_

☐ **Add \$25 after 9/18/98** \_\_\_\_\_

**Total Amount Enclosed** \_\_\_\_\_

**Please Note:** Cancellations must be received in writing and postmarked no later than September 18, 1998 to receive a refund, less a \$25 administrative fee. After that date, an alternate person from your organization may be sent at no extra charge, but no refund will be made. Absolutely no refunds will be made for any registrant who fails to attend the conference.

**Accommodations:** The conference will be held at the Orlando Radisson Plaza Hotel, 60 South Ivanhoe Blvd. For reservations, call the hotel at **800-333-3333** or **407-425-4455** and identify yourself as a Florida Housing Coalition conference participant to confirm the special rate.

**Please make check payable to and mail registration form and check to:**

Florida Housing Coalition ☐ 1367 East Lafayette Street, Suite C ☐ Tallahassee, Florida 32301  
Phone: (850) 878-4219 ☐ Fax: (850) 942-6312



# Annual Conference—October 14-16, 1998

Plan for three days of learning and fun with peers from all over Florida. Mark your calendar and plan to be a part of this pivotal event - join Florida's best at Orlando's Radisson Plaza Hotel, October 14-16, 1998.

## There's More

We know the value of peer-to-peer exchange; you've asked for more time with your peers, so we're planning two evening receptions and we've lengthened between session breaks. You also liked the tours, so we've brought them back; our local conference planning committee will host a tour of local housing success stories. Need help with a problem not covered in a workshop? Walk in to the affordable housing clinics and get expert help from a member of your Coalition's technical assistance team.

## The Grand Finale

This year's conference culminates with a three-hour focus on making housing affordable over the long term by making energy efficiency a part of every housing decision. Mr. Leon Jacobs of the Florida Public Service Commission describes the impact of electric utility deregulation on people with low incomes. What's the leading edge in evaluating efficiency? If you've read the lead article, you know it is the Energy Gauge Rating System—considering the house as a system and more than a checklist. Speaking of leading edge...is Florida House affordable? Hear from those who are demonstrating this amazing energy efficient technology in homes that are affordable to households earning below the area median income.

## Special Pre-Conference Activity

Last year was so successful, the Affordable Housing Study Commission returns this year for its second stakeholder's meeting.

## Conference Registration Rates:

- ❖ **Include 2 continental breakfasts**
- ❖ **2 lunches and**
- ❖ **2 evening receptions**
- ❖ **All general sessions, workshops, tours and**
- ❖ **clinics and lots of networking!**

## HOTEL Accommodations:

The conference will be held at the Orlando Radisson Plaza Hotel, 60 South Ivanhoe Blvd. A limited number of rooms are available at a special conference rate of \$75 per night (single-double) if reservations are made by September 19, 1998.

To make reservations, contact the hotel at **800-333-3333** or **407-425-4455** and identify yourself as a Florida Housing Coalition conference participant to confirm the special rate.

**Note:** A limited number of handicapped accessible rooms are available upon request.



## Energy Groups to Know

Want more information on energy efficiency? Several organizations can provide you with helpful resources and assistance as you learn more about energy issues:

### **Florida Solar Energy Center (407)638-1437**

The FSEC provides a wealth of helpful information on energy efficiency. Learn more about the Energy Gauge energy rating, the Energy Star program, and for written information on the benefits of any energy improvement. The staff provides free technical assistance for those interested in incorporating energy features into new construction projects, and can also provide customized suggestions for improvements to an existing home. Ms. Tei Simmerman, a staff person at FSEC and a Coalition board member, will direct you to the proper staff person for assistance.

### **Legal Environmental Assistance Foundation (LEAF) (850) 681-2581**

Are you interested in how the rights of low income customers are being addressed during the current debates surrounding the deregulation and restructuring of the utility industry? Ms. Deb Swim at LEAF can keep you updated.

### **Project for an Energy Efficient Florida, (850) 222-0808**

Ms. Marcia Elder publishes a newsletter, the Florida Energy Reporter, that provides updates on utility conservation programs and sustainability issues in Florida's communities.

### **Florida Power Corporation (407) 621-8715**

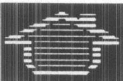
Mr. Melvin Philpot works on FPC's customer assistance programs and serves as a Coalition board member. If your program is located in Florida Power's service territory, he can help you coordinate your housing dollars with FPC's rebates for attic insulation, air conditioners, duct repair, and load management. He can also provide general assistance to help you better understand utility "demand side management programs" in your area.

### **Oak Ridge National Laboratory (423) 574-0749**

Under contract with the Department of Energy, Oak Ridge has developed "Partnerships for Affordable Housing," a program designed to promote energy efficiency in affordable housing through training and written materials. They can provide you with a checklist of measures to include in new construction, case studies of housing designs, in-depth reports on several of the measures included in the checklist, and a detailed list of specifications that can be provided to a contractor. Contact Mark Ternes for more details.

### **Fannie Mae's Energy Efficiency Mortgage (202) 752-2273**

Fannie Mae is currently conducting an Energy Efficiency Mortgage pilot program in nine states. According to Fannie Mae officials, it appears that this mortgage product will soon be available in Florida as well. The mortgage is structured to either permit a home buyer to borrow more than traditionally permitted under loan to income ratios when purchasing an energy efficient house or to borrow additional dollars to finance energy improvements on the house being purchased. In both cases, Fannie Mae anticipates that energy improvements will decrease the utility bill to a greater extent than the monthly mortgage payment is increased. Ultimately, monthly housing expenses are reduced. Contact Ms. Barbara Materre for more details.



# Annual Conference—October 14-16, 1998

## Conference Sponsorship Information

### Conference Sponsorship has many benefits:

- ❖ Sponsors support the Coalition's year-round technical assistance in the state.
- ❖ Sponsors are recognized at the Conference and in Conference materials.
- ❖ Sponsors are recognized all year as "Partners for Better Housing" in the *Housing News Network Journal*.
- ❖ Sponsors are entitled to free or reduced registrations at the Conference.

**Become a sponsor by filling out the form below and returning it with your contribution.**

**Name:** \_\_\_\_\_ **Title:** \_\_\_\_\_

**Organization:** \_\_\_\_\_

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**City:** \_\_\_\_\_ **State:** \_\_\_\_\_ **Zip Code:** \_\_\_\_\_

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\_\_\_\_\_ Check enclosed for level of support checked below or

\_\_\_\_\_ At this time we are committing to the level of support checked below and will forward check as soon as it is available.

### Conference Sponsor Memberships and Benefits

|   | <u>Level of Support</u> | <u>Conference Recognition</u> | <u>Journal Recognition</u> | <u>Free Registration</u> | <u>Complimentary Table at Funders Expo</u> |
|---|-------------------------|-------------------------------|----------------------------|--------------------------|--|
| <input type="checkbox"/> <b>Gold Sponsor</b>      | \$10,000                | Yes                           | Yes                        | 10 people                | Yes  |
| <input type="checkbox"/> <b>Silver Sponsor</b>    | \$7,500                 | Yes                           | Yes                        | 7 people                 | Yes  |
| <input type="checkbox"/> <b>Sponsor</b>           | \$5,000                 | Yes                           | Yes                        | 6 people                 | Yes  |
| <input type="checkbox"/> <b>Co-Sponsor</b>        | \$2,500                 | Yes                           | Yes                        | 3 people                 | No   |
| <input type="checkbox"/> <b>Patron</b>            | \$1,000                 | Yes                           | Yes                        | 1 person                 | No   |
| <input type="checkbox"/> <b>Non-Profit Patron</b> | \$1,000                 | Yes                           | Yes                        | 2 people                 | No   |
| <input type="checkbox"/> <b>Contributor</b>       | \$500                   | Yes                           | Yes                        | None                     | No   |

All Partners for Better Housing receive unlimited Conference registrations at member rate.

Please make check payable to: Florida Housing Coalition, 1367 East Lafayette St., Suite C, Tallahassee, FL 32301  
A registered 501(c)(3) not-for-profit corporation - all donations are tax deductible. Federal ID#59-2235835



Continued from page 7

Early results of the survey show that energy efficiency is addressed to some extent through the standard housing practices in most communities. Administrators express common concerns that lack of time and funding or other barriers hinder their proper attention on energy efficiency. Finally, discussions with housing and energy program professionals are specifying innovative ideas for future training and opportunities to coordinate the work of housing and energy groups.

The Coalition has already conducted more than 50 interviews with state-level and local housing administrators. The following is a preliminary inventory report of the purchase assistance and rehabilitation programs.

### Purchase Assistance Programs

Most communities require pre-purchase counseling for homebuyers. Ways to save on utility bills are promoted in classes that offer conservation tips and training on the maintenance of air conditioners and water heaters. More often, energy education is only briefly addressed. One SHIP administrator focuses on energy education by inviting a representative from the local utility company. (See the side bar article on page 16 on energy information to include in a homebuyer class.)

In three of the communities interviewed, it is standard practice for homebuyer counselors to review the utility bill history of existing homes for sale. This information helps provide a more realistic assessment of a new homeowner's projected monthly housing costs. A bill review and a free energy audit, provided by the local utility company, can prioritize energy improvements to be included in a rehabilitation of the house being purchased.

Homeowners receiving utilities from Florida Power Corporation, Florida Power and Light, or Tampa Electric Company may qualify to participate in "load control" programs. Participants receive monthly bill credits of \$6 or more for permitting the utility company to briefly turn off their water heater or air conditioner during periods of peak electricity demand. Although none of the communities surveyed currently link homeowners with load control programs, more than 10 administrators do recapture some of the costs of energy improvements by accessing utility company rebate programs for attic insulation, window tinting, highly efficient air conditioners and more.

One county surveyed plans to use energy efficiency improvements to open up the market of existing houses accessible by the SHIP purchase assistance program. These houses are in good condition and do not normally require repairs. Many SHIP administrators do not often focus on existing housing because (Section 420.9075(1) F.S.) the SHIP Act requires that 75 percent of SHIP funds be committed to construction-related activities, including rehabilitation, emergency repair, or new construction. Administrators in communities that are fortunate enough to have good quality homes in their market should remember that energy improvements by themselves will qualify these houses for SHIP's construction set aside provision.

An administrator should take advantage of the flexible nature of SHIP program to build in energy efficiency measures which improve the long term affordability of the housing while making it administratively easier to

***Administrators in communities that are fortunate enough to have good quality homes in their market should remember that energy improvements by themselves will qualify these houses for SHIP's construction set aside provision.***

meet the statutory set aside. Properly sealing the building envelope is a good example of an energy efficiency measure that would qualify as SHIP construction activity. This activity is often rated high on the list of rehabilitation priorities. Door and window replacement, weatherstripping and caulking are eligible construction activities and can reduce the monthly housing costs for the new homeowner. Other rehabilitation improvements are adding ceiling fans, replacing water heaters and central air conditioners, and adding attic and wall insulation. In one case, the county administrator will receive energy audits for its existing houses from the local Weatherization Assistance Program provider. These audits will provide a prioritized list of energy improvements for each house.

### Housing Rehabilitation

According to the Coalition's survey, energy efficiency is a common focus for many rehabilitation projects. Energy and water-saving features like the replacement of windows, doors, water heaters, attic insulation, water-saver toilets, and low-flow shower heads are addressed in more than 50 percent of the communities surveyed. Roughly one-third of the housing

Continued on page 16







by **Wight Greger**

**What are the common elements of a disaster strategy?** An effective way of quickly responding to community needs, aftermath of a state or nationally declared disaster, is by creating a strategy to assist a community's residents. A disaster relief strategy can be a new, stand-alone

strategy, or it can be incorporated into an existing homeowner rehabilitation strategy. Similar to a homeowner rehabilitation strategy, eligible repairs may include roof repair, window repair or replacement, and the rest. Some communities also allow activities which are responsive to the immediate health and safety needs of the resident. Tree and debris removal, and materials needed to temporarily halt damage caused by wind and rain entering the unit fall into this category. An often overlooked need is payment of insurance deductibles once the need for repairs has been determined, this is an eligible cost associated with repairing a unit. The SHIP rule also allows for payment of relocation costs; however, rental subsidies are expressly prohibited. It is also permissible to use SHIP funds for disaster mitigation activities. Elevating an eligible unit which is located in a flood plain is one example of permissible activities.

Some communities may choose to fund the disaster strategy regardless of whether there are other funds available to assist families in these situations, such as FEMA funds. It is important to remember that SHIP dollars can only be used to assist eligible units for eligible persons, those whose household income falls within the allowable income range, whereas FEMA funds provide assistance regardless of income. The traditional income verification and certification process may be cumbersome and difficult to implement in cases where traditional documentation is destroyed and action must be immediate. Local jurisdictions may wish to submit an alternative income certification process to the FHFC Review Committee for review and approval

when creating a new strategy or adding language to an existing homeowner rehabilitation strategy.

Creating a selection process which is fair and equitable is another important consideration. All local jurisdictions have an applicant selection process in place for serving eligible persons. If the intent is to address the immediate health and safety needs in the event of a disaster through an existing homeowner rehabilitation strategy, (and there is typically a waiting list for rehabilitation assistance) then the local jurisdiction must specify the circumstances and criteria under which an application for assistance can supersede the established process.

Remember that funds must be encumbered and disbursed in accordance with the SHIP Rule, regardless of how a disaster-relief strategy is created. As a practical matter, this means that if funds are budgeted for an under-utilized strategy, where there is no need for disaster-relief, then the funds must be re-allocated to a strategy which is being utilized within the time frames established for that fiscal year.

## HOUSING NEWS NETWORK

**Housing News Network** is published by the Florida Housing Coalition, Inc., as a service to its members and for housing professionals and others interested in affordable housing issues. To receive a subscription to the publication, complete the membership application on the back cover.

Address comments or questions regarding **Housing News Network** to:

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Web site: <http://www.nettally.com/fhc>



## SPECIAL NEEDS



*by Gladys Cook-Schneider*

The Coalition is completing its second year in partnership with the Florida Developmental Disabilities Council and is looking forward to a third year that will enable work to continue in providing technical assistance and facilitating a variety of

demonstration projects. The overall goal of the project is to provide assistance and support that will result in greater access to affordable housing for people who have developmental disabilities. In 1998-99, the Coalition will facilitate four regional workshops for support providers on building partnerships with affordable housing providers throughout the state. The schedule for these workshops will be announced at a later date. The Coalition will also continue to provide technical assistance to the four demonstration projects (see HNN, Winter 1998) that were initiated in the past two years to create partnerships and programs that could serve as a pilot for persons or groups wishing to provide affordable housing to this population. A special needs housing workshop will also be featured at the Coalition's annual conference October 14-16.

The demonstration projects have exhibited various creative approaches that can be utilized in other areas. For example, rental housing has been successfully developed in Sarasota County through a partnership with the county, support service providers, and a newly formed non-profit organization known as the Coalition to Assist Supported Living, or CASL. CASL received SHIP funds from Sarasota County for the acquisition and rehabilitation of four single family homes. As the property owner and landlord, CASL rents the homes to individuals with developmental disabilities who are receiving Supported Living Services from another provider, such as Loveland Center or Children's Haven. Up to three individuals can occupy each home, for a total of 24 residents in the four homes completed to date. Rents are affordable because the properties do not have any debt service. Rents are set to cover operating and reserve costs. The success of creating pleasant and workable housing solutions is a source of pride in the community. Residents of the homes were

formerly living in group homes with far less independence. Some were living in substandard housing conditions. A recent ribbon cutting, held to commemorate the opening of the homes, was attended by the full county commission and representatives from all major media in the area. Charles Richards, president of CASL, will present details on this success story at the Coalition's annual conference in October.



*Those assisting in the ribbon cutting ceremony from left to right are: Jack O'Neil, Sarasota County Commissioner; Jan DeBoer, CASL Board of Directors member; Sen. Robert M. Johnson, CASL Board of Directors member and former Florida State Senator; Charles E. Richards, CASL President and former Sarasota County Commissioner; Bob Anderson, Sarasota County Commissioner. Present but not photographed are Don Hadsell, Director, Sarasota Housing Department; Ray Pilon, Sarasota County Commissioner; David Mills, Sarasota County Commissioner, Chairman; and Jim Ley, Sarasota County Administrator.*

Homeownership strategies continue to be implemented in the Jacksonville demonstration project. A dozen potential home buyers with developmental disabilities have completed a homebuyer training course customized by the Grove House and Consumer Credit Counseling Services. Jacksonville Housing Partnership is responsible for assisting with down payment assistance through the local SHIP program.

Do you have success stories in providing housing for people with developmental disabilities or any other special need? The Coalition would like to hear from you. Information is being compiled on the many ways to approach this housing strategy. If you have been involved with special needs housing, or would like to learn how to become involved, contact Gladys Cook Schneider at (941) 283-6158 or write the Coalition.



Continued from page 15

administrators interviewed routinely link rehabilitation dollars with funds from the Weatherization Assistance Program (WAP) provider in their areas. Three SHIP administrators in the survey invite WAP staff to perform an initial energy assessment on each house. Together the group determines which funds will pay for each of the repairs.

The installation or replacement of central heaters and air conditioners is also common in some areas, even though it is more expensive than other measures. Seven communities include the installation of highly efficient SEER 12 air conditioners in their rehabilitation specifications. Three SHIP administrators routinely receive the rebate incentive (more than \$200) offered by the local utility company for installing SEER 12 air conditioners.

From the 50 interviews completed, it appears that little attention is placed on the proper sizing of new air conditioning equipment. Studies by Advanced Energy, Inc., and the Florida Solar Energy Center show that up to 50 percent of residential homes have oversized air conditioners. As noted in the lead article, properly sizing an air conditioner unit for the home will prevent the unnecessary costs of an oversized system and ensure that it operates in a cost effective and therefore affordable manner.

### Application of Results

The Coalition's housing and energy survey is revealing details of how energy efficiency is addressed in Florida's communities. This new information will assist future energy training. The survey results will define issues that challenge housing groups to consider logical steps for cost-effective energy features not currently in use. The Coalition will also share information on energy related topics through future journal articles. When the housing and energy inventory is completed, there will be a need to formulate a list of recommendations to ensure the maximum use of energy efficiency in making housing affordable. The Coalition will convene a meeting with the Department of Community Affairs, the Florida Housing Finance Corporation, the Florida Energy Office, the Affordable Housing Study Commission, and interested Public Service Commissioners to review these results, discuss how they affect affordable housing policy, and assign responsibilities for future energy-related activities.

The goal of this work is simple: increase utility affordability and thereby increase long-term housing affordability. The initial results of this current energy initiative are exciting. The study will place housing professionals closer to helping each of Florida's communities achieve the goal of offering and sustaining opportunities in affordable housing. ■

## HOME BUYER COUNSELING: The Elements of a "Power Presentation"

Utility bills can be reduced by installing energy saving features and by educating homebuyers about their homes. A 1996 study by the Alliance to Save Energy states that energy education can result in an additional 7-15 percent cost savings above and beyond any savings obtained through physical energy improvements. Here are some key points in energy efficiency to include in homebuyer classes:

- Provide tips to increase utility bill savings. Common ones include:

- Setting water heaters on "medium" or 120 rather than 140 degrees

- Closing the shades on west and east windows—or installing outside awnings to avoid direct sunlight from heating the house in the summer.

- Moving the refrigerator away from the stove.

- Cleaning around the refrigerator to keep it running optimally

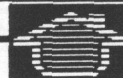
- Review the costs of operating a house. In Florida, heating and cooling comprises 40 percent of an average utility bill. Water heating is 20 percent and refrigeration is 10-12 percent of the bill. Lights account for only 6 percent of energy costs. Make a fun exercise of having homebuyers guess what slice of the "energy pie" is devoted to lights, cooling, etc.

- Introduce home buyers to the energy audits and rebates offered by utility companies. Many local utilities provide free audits and written information to answer a homeowner's energy questions. Invite a utility company representative to make a short presentation. They do this frequently throughout the community.

- Review how to properly operate central heating and cooling systems to prevent high bills. In some areas, many low income homebuyers may be living in a house with central heat and air for the first time. The system can be comfortably set at 78 degrees in summer and 65 degrees in winter. Circulating air with ceiling fans may allow comfort at even higher settings. Cooling costs will be reduced for each degree higher than 78 that the air conditioner is set in the summer. Additional savings will be achieved if homeowners are encouraged to install programmable thermostats to set back the heater/cooler during the day while they are away from home and at night.

- Address maintenance of the house. Changing air filters monthly and sealing holes in walls, around doors, windows and pipes with caulk and weatherstripping are a routine part of homeownership.

- Dispel energy myths. Turning off unnecessary lights, for example, will not account for the same bill savings as setting the air conditioner to a higher setting and using a ceiling fan to circulate air. Also, setting the air conditioner to a lower setting (74 in summer, for example) will not cool down the house faster. It will only require the system to run longer and waste money.





## PUBLICATIONS

**Building Sustainable Communities: Best Practices in Community Development Lending** is available from the National Association of Affordable Housing Lenders. The publication provides case studies, detailed narrative and financial profiles of innovative projects. For a copy, call NAAHL at 202/861-5770.

**Digest of Cases and Other Resources on Fair Housing for People with Disabilities** from the Bazelon Center for Mental Health Law; 202/467-5730.

**The 1997/1998 Directory of National, Statewide and Local Homeless & Housing Advocacy Organizations** (6th edition, 250 listings) is available for \$4.25 from the National Coalition for the Homeless. An online version will be posted to NCH's Web site at <http://nch.ari.net>.

**Building Affordable Rental Housing** is a new report that provides a detailed look at the characteristics and performance of the Low Income Housing Tax Credit's rental developments. To obtain the report, call <http://www.cityresearch.com> or call City Research at 617/367-4390.

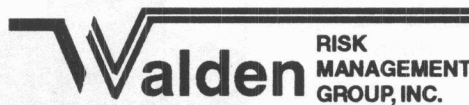
**Building Community - Exploring New Relationships Across Service Systems Reform, Community Organizing and Community Economic Development** is a recent publication by the Together We Can Initiative at the Institute for Educational Leadership. Offers an introduction to the critical issue of linking family, community, and economic development. For a free copy, e-mail: [hershal@ncced.org](mailto:hershal@ncced.org) National Congress of Community Economic Development or call 202/234-5009, ext. 103.

### **NEED DIFFICULT TO FIND INSURANCE COVERAGES FOR YOUR NON PROFIT HOUSING ORGANIZATION???? NOT A PROBLEM HERE AT WALDEN RISK MANAGEMENT GROUP!!!!!!**

We are an Insurance Agency in Tennessee and have been writing Insurance Coverages for Non Profits such as: *Habitat for Humanities, Episcopal Churches, TeamEfforts & Self Helps* for over 12 years. Coverages Such As:

- BUILDERS RISK
- ◆ GENERAL LIABILITY
- ◆ DIRECTORS AND OFFICERS LIABILITY
- ◆ VOLUNTEER ACCIDENT COVERAGE
- ◆ DISHONESTY BONDS

Give us a call for a Free Package of Information including prices for the above coverages. Our Toll Free Number Is: 800/280-9764 or E-mail us at [WRMGCW@aol.com](mailto:WRMGCW@aol.com)



CHRISTY SMITH WEDDLE  
President

PO Box 15766 3212A Dayton Blvd., Chattanooga Tennessee 37415  
(423) 870-7066 ♦ Fax (423) 870-7082 ♦ Email: [WRMGCW@aol.com](mailto:WRMGCW@aol.com)



## COALITION NEWS

### Update on Catalyst Workshops

The Florida Housing Coalition began training through a series of DCA-sponsored workshops held in locations throughout the state beginning this past May. Workshop topics have included Housing 101, Partnership Development, Housing Rehabilitation, Program Administration, Non-Profit Sponsor Training, Architectural Design, and Financing and Underwriting for Affordable Housing. Many of the topics will be offered a second or third time through November 1998. The workshops have been well attended and well received. A total of 575 registrations have been taken as of June 30, 1998. Coalition staff have also written a comprehensive manual which covers most of the topic areas presented at the workshops, and which has been distributed at each workshop session. For more information on upcoming workshops and locations, and how to get workshop materials, please call the Coalition at 1-800-677-4548.



*Even seasoned housing professionals took advantage of the Program Administration workshop sponsored by the Dept. of Community Affairs and conducted by the Florida Housing Coalition in Orlando in June.*

### Welcome Joanna Booth



Joanna Booth has joined the Coalition as communications coordinator and editor of Housing News Network. Prior to joining the Coalition in July, she was the manager of publications for the Florida League of Cities. Joanna is responsible for producing the Coalition's publications, conducting research, maintaining the Coalition's

Web site and media relations. Joanna's other work includes workshop administration, assisting with board liaison duties and fundraising. Joanna has a Bachelor of Science degree in Graphic Design.

### Coalition Web Site Updates

Coalition web site has been expanded to include a new links to other housing organizations. The web site was updated in June. Look for the Housing Related Sites on home page. The best resource in the state for Florida housing professionals.

### Congratulations

Congratulations to the Fidelity Federal Savings Bank of Florida for obtaining a rating status of "outstanding" on the Community Reinvestment Act (CRA) Southeast Region Performance Evaluation for May 1998. The Florida Housing Coalition received notification from the Office of Thrift Supervision that Fidelity Federal Savings Bank of Florida obtained the highest rating status on the CRA Southeast Region Performance Evaluation for May 1998.

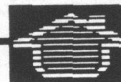
Fidelity Federal Savings Bank is a Florida Housing Coalition Partner for Better Housing.



### Julanne Rutten will be Missed

Julanne Rutten resigned her duties as communication coordinator after two years with the Florida Housing Coalition. She decided to spend her days with her 14 month old daughter, Sara. Executive Director, Tracy Suber commented, "Julanne's work presented the coalition in a highly

professional manner. Her complete redesign of the Web Page facilitates member access to the affordable housing information that they need. We will miss her."



# RESOURCES

## Public Funding

Funding is available for Community Planning and Development, Public and Indian Housing, Housing and Lead Hazard Control programs. Applications are due September 1. For more information contact local Office of Native American Programs. See Federal Register 6/1 pp. 29823-29826.

## Service Coordinator

HUD funding is available for a service coordinator to help residents of Section 515, 8, 202, 221(d)(3) and 236 housing developments obtain supportive services from the community. See [http://www.access.gpo.gov/su\\_docs/aces/aces140.html](http://www.access.gpo.gov/su_docs/aces/aces140.html) Federal Register 5/29, pp. 29489-29493. For application kits or more information, contact the <http://www.hud.gov> Multifamily Clearinghouse or call 800/685-8470.

## Private Funding

### Affordable Housing

The Federal Home Loan Bank of Atlanta has announced the 1998 offering schedule for its "new" Affordable Housing Program. There are two offering periods, with the last deadline falling on September 15, 1998. For more information, call 800/536-9650, ext. 8436.

### AmeriCorps Funding

The Corporation for National and Community Service is offering new and renewal funding for AmeriCorps program grants. For more information, see [http://www.access.gpo.gov/su\\_docs/aces/aces140.html](http://www.access.gpo.gov/su_docs/aces/aces140.html) Federal Register 11/28, pp. 63318-63319 or call the Corporation at 202/606-5000, ext. 125.

### Florida Community Loan Fund

The Florida Community Loan Fund, through the Florida Community Development Initiative, provides low-interest loans and technical assistance to qualified community-based organizations in Florida that specialize in working to improve housing and economic conditions in their communities. The Loan Fund lends to qualified non-profit, 501(c)(3) organizations which have a strong community base and serve low-income communities within Florida.

The mission of the organization must involve low-income housing, economic development or social services. Loans are available in the amounts of \$5,000 to \$100,000 and technical assistance is provided for borrowers and potential borrowers by the Florida Housing Coalition. For more information, contact the Florida Community Loan Fund, P.O. Box 22332, St. Petersburg, FL 33742 or phone 813/578-2030.

## Long-term Economic Development

The Hitachi Foundation offers grants for long-term economic development of low-income communities. Hitachi typically looks for programs involving partnerships of one or more businesses working closely with nonprofit groups. For grant application and information, send a self-addressed envelope to Hitachi Foundation, 1509 22nd St. N.W., Washington, DC 20037-1073.

## Rural Housing Loan Fund

The Southeast Rural Community Assistance Project offers loans for low income single family and multi-family housing projects in the rural Southeast U.S. for predevelopment studies/plans, acquisition costs, on-site/off-site improvements, infrastructure development, new or rehabilitation construction, and cost overruns or gap funds. Eligible borrowers include nonprofits, local governments and user associations. Eligible projects serve populations of 10,000 or less with a 30 percent threshold of low-to-moderate income residents. Applications are accepted throughout the year and are acted upon within 60-90 days of receipt. For an information/application packet, contact the Loan Fund at P.O. Box 2868, Roanoke, VA 24001-2868 or phone 540/345-1184 or fax 540/342-2932.

*For a more complete list of housing related publications, resources and upcoming events, visit <http://www.nettally.com/fhc>.*





## UPCOMING EVENTS

**August 18-19** Nonprofit Sponsor Training (Orlando, Florida) A free two-day workshop offered by the Florida Housing Coalition through the Florida DCA's Affordable Housing Catalyst Program. Who should attend—Local government staff who work with and/or have oversight responsibilities of nonprofit sponsors, and staff from nonprofit organizations which manage some aspect of the local affordable housing program. Topics—Business management principles, fiscal responsibility, record-keeping and reporting requirements, leveraging public/private funds, how to pay for the most common activities, maintaining good relationships between funders and nonprofits. To register, call for a workshop registration form and fax to (850) 942-6312.

**August 26-27** Program Administration (Panama City, Florida) A free two-day workshop offered by the Florida Housing Coalition through the Florida DCA Affordable Housing Catalyst Program. For new and experienced housing program staff from local governments and non-profit organizations with a primary focus on SHIP, state HOME and Small Cities CDBG programs. Topics include the development process and regulatory considerations, leveraging resources, applicant selection, eligibility and property feasibility, income qualification and certification, record keeping and file management, reporting program accomplishments, financial management, working with local lenders and other housing partners, staffing and nonprofit involvement, homebuyer counseling and training, marketing and advertising. To register, call for a workshop registration form and fax to (850) 942-6312.

**September 9-10** Florida Housing Finance Corporation Conference (Tampa, Florida) For more information, call 850/488-4197.

**September 15-16** Affordable Housing Study Commission Meeting, Orlando, Radisson Downtown. The Commission is finalizing a proposed comprehensive housing policy for Florida. The public is welcome to attend. For more information, contact Staff Director Nancy Muller at 850/922-1606.

**September 23** Partnership Development (Gainesville, Florida) A free workshop offered by the Florida Housing Coalition through the Florida DCA's Affordable Housing Catalyst Program. Who should attend—Local housing partnership members, local government housing staff, city and county managers, local elected officials. Topics—Identifying and recruiting effective community partners, the role of the partnership in community development, education and advocacy issues, opportunities for broadening the community partnership, leveraging public and private funds, effective communication techniques, increasing community awareness. To register, call for a workshop registration form and fax to (850) 942-6312.

**October 13** Affordable Housing Study Commission Stakeholders' Meeting (Orlando, Florida) An opportunity for the public to present concerns and ideas on the state's comprehensive housing policy to commissioners. For more information, contact Staff Director Nancy Muller or call 850/922-1606.

**November 1-4** Beyond Bricks: People and Possibilities (Denver, Colorado) The Enterprise Foundation's 17th Annual Network Conference. For more information, visit Enterprise's web site or call 410/772-2467.

**November 4-5** Program Administration (Miami, Florida) A free two-day workshop by the Florida DCA Affordable Housing Catalyst Program. For new and experienced housing program staff from local governments and non-profit organizations with a primary focus on SHIP, state HOME and Small Cities CDBG programs. Topics include the development process and regulatory considerations, leveraging resources, applicant selection, eligibility and property feasibility, income qualification and certification, record keeping and file management, reporting program accomplishments, financial management, working with local lenders and other housing partners, staffing and nonprofit involvement, homebuyer counseling and training, marketing and advertising. To register, call for a workshop registration form and fax to (850) 942-6312.





ORIGINAL

February 8, 1999

Ms. Blanca Bayo, Director  
Division of Records and Reporting  
Florida Public Service Commission  
2540 Shumard Oak Boulevard  
Tallahassee, FL 32399-0950

RE: Docket Nos.: 971004-EG - 971007-EG

971006

99 FEB-9 11 9 03

Dear Ms. Bayo:

Enclosed, for filing in the dockets referenced above, are the original and ten copies of the following documents: Notice of Service of LEAF's Second Interrogatories (Nos. 7-79) to Florida Power & Light, Notice of Service of LEAF's Second Interrogatories (Nos. 7-79) to Florida Power Corporation, Notice of Service of LEAF's Second Interrogatories (Nos. 7-79) to Tampa Electric Company, and Notice of Service of LEAF's Second Interrogatories (Nos. 7-79) to Gulf Power Company.

Please document this filing by stamping the attached copy of this letter and returning it to me. Thank you for your assistance in this matter. If you have questions, please let me know.

Sincerely,

*Debra Swim*

Debra Swim  
Senior Attorney  
Energy Advocacy Project

ACK \_\_\_\_\_  
AFA \_\_\_\_\_  
APP \_\_\_\_\_  
CAF \_\_\_\_\_  
CMU \_\_\_\_\_  
CTR \_\_\_\_\_ Enclosures  
EAG \_\_\_\_\_  
LEG 1 \_\_\_\_\_  
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OPC \_\_\_\_\_  
RCH \_\_\_\_\_  
SEC 1 \_\_\_\_\_  
WAS \_\_\_\_\_

RECEIVED & FILED

*Swim*  
FPSC-BUREAU OF RECORDS

OTW  
A Public Interest Law Firm

ORIGINAL



February 8, 1999

Ms. Blanca Bayo, Director  
Division of Records and Reporting  
Florida Public Service Commission  
2540 Shumard Oak Boulevard  
Tallahassee, FL 32399-0950

RE: Docket Nos.: 971004-EG - 971007-EG

Dear Ms. Bayo:

Enclosed, for filing in the dockets referenced above, are the original and ten copies of the following documents: LEAF's Second Request for Production to Florida Power and Light, 01745-99; LEAF's Second Request for Production to Florida Power Corporation, 01746-99; LEAF's Second Request for Production to Tampa Electric Company, and LEAF's Second Request for Production to Gulf Power Company, 01747-99.

Please document this filing by stamping the attached copy of this letter and returning it to me. Thank you for your assistance in this matter. If you have questions, please let me know.

Sincerely,

*Debra Swim*

Debra Swim  
Senior Attorney  
Energy Advocacy Project

ACK \_\_\_\_\_  
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Enclosures

RECEIVED & FILED

FPSC-BUREAU OF RECORDS

99 FEB 10 AM 8 32

A Public Interest Law Firm

1114-E THOMASVILLE ROAD • TALLAHASSEE, FLORIDA • 32303-6290 • 850-681-2591 • FAX 850-224-1275 Recycled Paper



# BLACK & VEATCH

8400 Ward Parkway, P.O. Box 8405, Kansas City, Missouri 64114, (913) 458-2000

February 9, 1999

Florida Public Service Commission  
Division of Records and Reporting  
2540 Shumard Oak Boulevard  
Tallahassee, Florida 32399-0850

Attention: Ms. Blanca S. Bayo  
Director

Dear Gentlemen:

I would like to remain on the mailing list for Dockets 971004-EG, 971005-EG, 971006-EG, and 971007-EG since I am doing power supply planning work for several Florida utilities.

My mailing address is:

Myron Rollins  
Black & Veatch  
P.O. Box 8405  
Kansas City, MO 64114  
913-458-7432

Very truly yours,

BLACK & VEATCH

  
Myron R. Rollins

jsm

*Done 2/16/99*





# BLACK & VEATCH

8400 Ward Parkway  
P.O. Box 8405  
Kansas City, Missouri 64114 USA

Black & Veatch Corporation

Tel: (913) 458-2000

March 30, 1999

Florida Public Service Commission  
Division of Records and Reporting  
2540 Shumard Oak Boulevard  
Tallahassee, FL 32399-0850

Attention: Ms. Blanca S. Bayo  
Director

Gentlemen:

I would like to remain on the interested party list for Docket 971004-EG, 971005-EG, 971006-EG, and 971007-EG since I am doing conservation planning work for several Florida utilities.

My mailing address is:

Myron Rollins  
BLACK & VEATCH  
P. O. Box 8405  
Kansas City, MO 64114  
913-458-7432

Very truly yours,

BLACK & VEATCH

Myron R. Rollins

smm

RECEIVED-FPSC  
99 APR -9 AM 10:24  
RECORDS AND  
REPORTING

Done 4/09/99

**BEFORE THE FLORIDA PUBLIC SERVICE COMMISSION**

IN RE: Adoption of Numeric Conservation Goals by:  
Florida Power and Light Company  
Florida Power Corporation  
Gulf Power Company, and  
Tampa Electric Company

Docket No. 971004-EG  
Docket No. 971005-EG  
Docket No. 971006-EG  
Docket No. 971007-EG

**NOTICE OF SUBSTITUTES TO SERVICE LIST**

The Legal Environmental Assistance Foundation, Inc. ("LEAF") files this notice of substitutes to service list and states:

LEAF's Petition to Intervene asks that copies of documents filed in the above-styled cases be sent to Gail Kamaras/Debra Swim in Tallahassee and to Mollie Lampie in Albany New York. Henceforth, please direct such filings only to the following two persons and addresses:

Debra Swim  
Legal Environmental Assistance Foundation, Inc.  
1114 Thomasville Road, Suite E  
Tallahassee, FL 32303-6290

Susan Geller  
Resource Insight, Inc.  
347 Broadway  
Cambridge, MA 02139-1715

RECORDS AND  
REPORTING

99 APR 16 AM 11:15

RECEIVED-FPSC

Respectfully submitted,

*Debra Swim*

DEBRA SWIM, Esq.  
Legal Environmental Assistance Foundation, Inc.  
1114 Thomasville Road, Suite E  
Tallahassee, FL 32303-6290  
(850) 681-2591

**NOTICE OF SERVICE**

I HEREBY CERTIFY that the original and one copy of the foregoing was sent by U.S. Mail to Leslie Paugh, Esq., Florida Public Service Commission, 2540 Shumard Oak Blvd., Tall., FL 32399-0850; Jack Shreve, Esq., Office of Public Counsel, 111 W. Madison, Tall., FL 32399-1400; Charles Guyton, Esq., Steel, Hector & Davis, 215 S. Monroe St., Suite 601, Tall., FL 32301-1804; James McGee, Esq., Florida Power Corporation, P.O. Box 14042, St. Petersburg, FL 33733; Jeffrey Stone, Esq., Beggs & Lane, P.O. Box 12950, Pensacola, FL 32576-2950; Lee Willis, Esq./James Beasley, Esq., Ausley & McMullen, 227 South Calhoun Street, Tall., FL 32301-1804; Vicki Kaufman, Esq. 117 S. Gadsden St., Tall., FL 32301; and John McWhirter, Esq., P.O. Box 3350, Tampa, FL 33601 this 15th day of April, 1999.

*Debra Swim*

Debra Swim, Esquire

*Done 4/20/99*

✓

M E M O R A N D U M

JULY 15, 1999

RECORDS AND  
REPORTING

03 JUL 15 PM 1:46

RECEIVED-FPSC

TO: DIVISION OF RECORDS AND REPORTING *JAP*  
FROM: DIVISION OF LEGAL SERVICES (PAUGH, ELIAS) *RVE*  
RE: DOCKET NOS. 971004-EG, 971005-EG, 971006-EG, 971007-EG -  
ADOPTION OF NUMERIC CONSERVATION GOALS BY FLORIDA POWER  
& LIGHT COMPANY, FLORIDA POWER CORPORATION, GULF POWER  
COMPANY AND TAMPA ELECTRIC COMPANY.

*PSC-99-1361-PCO-EG*

Attached is an ORDER REVISING PROCEDURAL SCHEDULE to be issued  
in the above-referenced docket. (Number of pages in order - 3)

**MUST GO TODAY**

LJP/RVE/js

Attachment

cc: Division of Electric and Gas (Futrell, Haff)

I:goals/revproc.ord

*9f*

*/m*

✓

M E M O R A N D U M

JULY 19, 1999

99 JUL 19 PM 12:10

RECORDS AND  
REPORTING

TO: DIVISION OF RECORDS AND REPORTING *JJP*  
FROM: DIVISION OF LEGAL SERVICES (PAUGH) *RUE*  
RE: DOCKET NO. 971006-EG - ADOPTION OF NUMERIC CONSERVATION  
GOALS BY GULF POWER COMPANY

99-1381-FOF

Attached is an ORDER APPROVING STIPULATION BETWEEN GULF POWER  
COMPANY AND LEGAL ENVIRONMENTAL ASSISTANCE FOUNDATION to be issued  
in the above-referenced docket. (Number of pages in order - 15)

LJP/js

Attachment

cc: Division of Electric and Gas (Haff)

I:goals/971006or.ljp

*attach's not online  
See!*

*10-RAR*

-----  
From: Hong Wang  
To: Jackie Schindler  
Subject: fwd: Message confirmation  
-----

===CONFIRMATION=====7/22/99==1:31pm==

Read by: Hong Wang  
Opened: 7/22/99 1:31pm  
Form: NOTE  
Sent: 7/22/99 1:30pm

Text begins:  
bob sent a notice down this morning and  
it's supposed to get faxed to all parties  
and to the exec. office of the governor  
after ...

Fwd=by:=Jackie=Schind=7/22/99==2:35pm==  
Fwd to: Hong Wang

.....  
hi - called over there and got the fax  
numer - it is 414-2261

Fwd=by:=Hong=Wang=====7/22/99==2:45pm==  
Fwd to: Jackie Schindler

.....  
Thank you! Jackie. Can you please give me  
the telephone number you used? Do you know  
who is the contact person?

Fwd=by:=Jackie=Schind=7/22/99==2:54pm==  
Fwd to: Bob Elias, Hong Wang

.....  
no, don't have a contact person - i used  
the number from the phone book: 488-7810

bob - do you have a "contact person" that  
Hong can enter in cms?

Fwd=by:=Bob=Elias=====7/22/99==2:57pm==  
Fwd to: Jackie Schindler

.....  
Nope.  
Fwd=by:=Jackie=Schind=7/22/99==2:58pm==  
Fwd to: Hong Wang

.....  
sorry...  
Fwd=by:=Hong=Wang=====7/22/99==2:59pm==  
Fwd to: Jackie Schindler  
CC: Bob Elias, Kay Flynn

.....  
I just called over there. The General  
Government Unit just moved to Room 1501  
last Friday, their telephone number is  
487-1884, and the contact person is Stuart  
Pollins. I have updated the following  
dockets accordingly:  
971004, 971005, 971006, 971007, 990720,  
990721, 990722

-----  
From: Jackie Schindler  
To: Hong Wang, Ruth Nettles  
Subject: fwd: Please add to service lis  
-----

===NOTE=====7/22/99==9:50am==

CC: Bob Elias, Leslie Paugh .....  
in Docket No. 971006 EG - Adoption of  
Numeric Conservation Goals for Gulf Power  
Company...Please add:

Russell Badders  
Jeffrey Stone  
at Beggs & Lane in Pensacola

They are counsel for Gulf Power in this  
proceeding - Thanks!

Fwd=by:=Hong=Wang=====

Fwd to: Jackie Schindler

CC: Ruth Nettles

.....

Done.

-----

-----  
From: Kay Flynn  
To: Hong Wang  
Subject: fwd: Executive Office of the Governor  
-----

===NOTE=====7/22/99=12:58pm=====

CC: Bob Elias  
.....

Hong, based on 366.82(2), F.S., please add

Executive Office of the Governor  
Office of Planning and Budget  
General Government Unit  
The Capitol, Room 1502  
Tallahassee FL 32399-0001

to Dockets 971004, 971005, 971006, 971007, 990720, 990721, and 990722 as a PARTY.  
You may want to add an explanation in the comments field as well.

Thanks. Kay

Fwd=by:=Hong=Wang=====

Fwd to: Kay Flynn

CC: Bob Elias  
.....

Done.  
-----



-----  
From: ALEXANDE @ SMTP (Alexander Mack) {Alexander.Mack@DCA.STATE.FL.US}  
To: CAF Internet E-mail  
Subject: Contact Name  
-----

====NOTE=====8/18/99=12:35pm=====

Return-Path: <Alexander.Mack@DCA.STATE.FL.US>  
Received: from DCA.STATE.FL.US (204.110.208.3)  
by mail.psc.state.fl.us (Connect2-SMTP 4.30A.1000128)  
for <contact@psc.state.fl.us>; Wed, 18 Aug 1999 12:32:15 -0400  
Received: from DCA1-Message\_Server by DCA.STATE.FL.US  
with Novell\_GroupWise; Wed, 18 Aug 1999 12:35:30 -0400  
Message-Id: <s7baa892.080@DCA.STATE.FL.US>  
X-Mailer: Novell GroupWise 4.1  
Date: Wed, 18 Aug 1999 12:35:15 -0400  
From: Alexander Mack <Alexander.Mack@DCA.STATE.FL.US>  
To: contact@psc.state.fl.us  
Subject: Contact Name  
Mime-Version: 1.0  
Content-Type: text/plain  
Content-Disposition: inline

Please remove Jim Tait from your mailing  
list. All correspondence should be  
addressed to:

Alexander Mack  
Community Program Administrator  
Florida Energy Office  
Department of Community Affairs  
2555 Shumard Oak Boulevard  
Tallahassee, FL 32399-2100  
(850) 488-2475 (PH)  
(850) 488-7688 (FAX)  
E-mail alexander.mack@dca.state.fl.us

971004  
971005  
971006  
971007



# Public Service Commission

State of Florida

## -M-E-M-O-R-A-N-D-U-M-

DATE: August 19, 1999  
TO: Blanca Bayó, Director, Records and Reporting  
FROM: Joy Kelly, Chief, Bureau of Reporting  
RE: DOCKET NO. 971004-EG, 971005-EG, 971006-EG, 971007-EG, HEARING  
HELD 8-17-99.

RE: ADOPTION OF NUMERIC CONSERVATION GOALS BY FLORIDA POWER &  
LIGHT COMPANY, FLORIDA POWER CORPORATION, GULF POWER  
COMPANY AND TAMPA ELECTRIC COMPANY.

DOCUMENT NO. 09824, 8-18-99

The transcript for the above transcribed hearing has been completed and is forwarded for placement in the docket file, including attachments.

Please note that Staff distribution of this transcript was made to:

LEGAL, AFAD, E&G

Acknowledged by:

mar

JK/pc

PSC/RAR 28 (Rev7/94)

*This transcript is filed with 971004-EG*

State of Florida



Public Service Commission

-M-E-M-O-R-A-N-D-U-M-

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**DATE:** August 20, 1999  
**TO:** Blanca Bayo, Director, Records and Reporting  
**FROM:** Joy Kelly, Chief, Bureau of Reporting  
**RE:** DOCKET NO. 971004-EG, 971005-EG, 971006-EG and 971007-EG, HEARING  
HELD 8-17-99

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Attached for filing in the docket file of the captioned docket are Exhibit Nos. 1 through 8, representing a complete filing of all exhibits admitted into the record during the hearing in this matter.

Acknowledged by:

Mont R.

JK:pc

*These exhibits are filed with 971004-EG*



# Public Service Commission

## -M-E-M-O-R-A-N-D-U-M-

RECORDED AND  
INDEXED

AUG 24 PM 2:46

RECEIVED PSC

**DATE:** August 23, 1999  
**TO:** Blanca Bayo, Director, Division of Records and Reporting  
**FROM:** Melinda Butler, Assistant to Commissioner Jacobs *MB*  
**RE:** Intercepted Communications From an Interested Party Received in  
Docket No. 971004 through Docket No. 971007

This office has received the attached correspondence of Deborah B. Evans dated August 16, 1999. The correspondence has not been viewed or considered in any way by Commissioner Jacobs. Under the terms of the advisory opinion from the Commission on Ethics (issued July 24, 1991 as COE 91-33-JULY 19, 1991), the following letter does not constitute an ex parte communication by virtue of the fact that it was sent by an individual customer and it was not shown to the Commissioner. Given that it is not an ex parte communication, it does not require dissemination to parties pursuant to the provisions of Section 350.042, Florida Statutes. However; in such cases Commissioner Jacobs has requested that a copy of the correspondence and this memo, as a matter of routine, be placed in the correspondence side of the file in this docket.

RECEIVED

AUG 17 1999

FLORIDA PUBLIC SERVICE COMMISSION

DATE: AUG 17 1999

Deborah Beverly Evans  
12307 Old Country Road  
Wellington, Florida 33414

August 16, 1999

Commissioner E. Leon Jacobs  
Florida Public Service Commission  
2540 Shumard Oak Boulevard  
Tallahassee, FL 32399-0850

Re: Docket Nos. 97-1004-EG through 97-1007-EG  
Conservation Goal Setting for Florida Investor Owned Utilities

Dear Commissioner Jacobs:

After reviewing the stipulation between FPL and LEAF, I am writing to you to express my concerns. As most of you may remember, I intervened in FPL's conservation goal setting docket in 1994.

There is potential with the programs proposed in the stipulation, and I am pleased to see in particular the PV energy initiatives. However, we need to go further. There are enormous energy savings to capture. When only a limited number of energy-saving options are presented to electric utility customers, capturing only a fraction of the energy savings, it only serves to perpetuate wastefulness. I am concerned that there are no measures for water heating, energy-efficient appliances such as refrigerators and computers, radiant barriers, low E windows, shade screens, substituting natural gas for home heating in lieu of electric strip heat and for cooking (which PSC staff recognizes is a better use of primary energy), occupancy or motion sensors and compact fluorescent lighting. I know there are other measures from the SRC study which also have utility potential. All of these measures save energy during peak and non-peak periods, as FEECA directs.

As FPL residential customers use 41 billion kwh per year, more than any other utility in the country (please see attached article from the Palm Beach Post on November 24, 1997), I find strict reliance on the RIM-based cost effectiveness test disappointing. At the 1994 conservation goals dockets, the commission urged the utilities to file TRC measures. Since they are not doing so, I would urge the PSC to prescribe programs to capture these lost energy savings.

Using RIM alone to determine cost-effectiveness deprives significant numbers of electric utility customers of opportunities to timely contribute to solving our energy and environmental problems. This is a time when we must aggressively address these problems.

Sincerely,

*Deborah B. Evans*

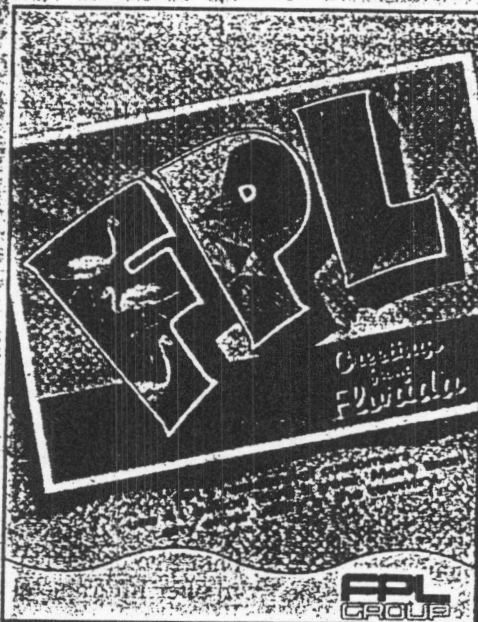
Deborah B. Evans

Enclosure

The Palm Beach Post  
November 24, 1997

## LOCAL BEAT

### UTILITIES



**'The purpose of this campaign is to increase institutional ownership of our common stock.'**

**JACK MILNE,**

**FPL spokesman**

The ads prominently feature the FPL ticker symbol, with the utility's full name appearing only in small print.

## FPL sings its own praises in ads

Greetings from Florida.

That's the message on one of several Florida Power & Light ads running in financial publications these days.

The quarter-page ads are running August through December in *Barron's*, *Institutional Investor* and *The Wall Street Journal*. The company would not disclose the cost.

The ads prominently feature the FPL ticker symbol, with the utility's full name appearing only in small print.

"Wall Street and professional

investors are tuned to ticker symbols," said FPL spokesman Jack Milne. "The purpose of this campaign is to increase institutional ownership of our common stock."

The utility has 173 million shares of common stock outstanding; 51 percent is owned by institutions.

The ads promote FPL with such slogans as: "Over 7 million people served daily" and: "FPL is building a strong foundation with 170 new customer accounts a day."

— JOHN MURAWSKI



Deborah Beverly Evans  
12307 Old Country Road  
Wellington, Florida 33414

1991 12/20  
Beverly Evans