

# Income Qualified EE Advisory Committee North

## Attendee List and Meeting Notes

Tuesday, April 3, 2018  
10:00 am – 3:00 pm  
ComEd – Chicago Training Center  
3536 S. Iron Street, Chicago, IL

### **Attendees (in-person)**

Annette Beitel, Facilitation  
Celia Johnson, Facilitation  
Juliana Pino, Little Village Environmental Justice Organization (LVEJO), Leadership Team  
Pastor Booker T. Vance, Faith in Place, Leadership Team  
Molly Lunn, ComEd, Leadership Team  
Chris Vaughn, Nicor Gas, Leadership Team  
Mike King, Nicor Gas, Leadership Team  
Omayra Garcia, Peoples Gas/North Shore Gas, Leadership Team  
Christina Pagnusat, Peoples Gas/North Shore Gas, Leadership Team  
Mike Brandt, ComEd  
Julie Hollensbe, ComEd  
Mike Butkus, ComEd  
Jean Ascoli, ComEd  
Jacob Stoll, ComEd  
Maggie Palka, ComEd  
Cory Foster, ComEd  
Luis Diaz-Perez, ComEd  
Tassany Campbell, ComEd  
Mark Szezygi, Nicor Gas  
John Pady, Community and Economic Development Association of Cook County, Inc. (CEDA)  
Harold Rice, Community and Economic Development Association of Cook County, Inc. (CEDA)  
Ashley Palladino, Resource Innovations  
Atticus Doman, Resource Innovations  
Renwick Paige, Energy Infrastructure Partners  
David Baker, Energy Resources Center/UIC  
Oscar Mora-Diaz, Energy Resources Center/UIC  
Stefano Galiasso, Energy Resources Center/UIC  
Abe Scarr, Illinois Public Interest Research Group (IL PIRG)  
Kevin Dick, Delta Institute  
Laura Goldberg, Natural Resources Defense Council (NRDC)  
Brien Yeung, Seventhwave  
Chelsea Lamar, Navigant  
Kris White, Will County Center for Community Concerns (WCCCC)

Noelle Gilbreath, Community Investment Corp. (CIC)  
Maragaret Garascia, Elevate Energy  
Kate Brown, Elevate Energy  
Delmar Gillus, Elevate Energy  
Lavannya Pulluveetil, Environmental Defense Fund (EDF)  
Beth Galante, PosiGen Solar  
LeAnna McKeon, Chicago Housing Authority  
Cheryl Johnson, People for Community Recovery  
James Carlton, People for Community Recovery  
Donna Carpenter, Community Organizing and Family Issues (COFI)  
Monica Paulson, Community Organizing and Family Issues (COFI)  
Stacey Paradis, Midwest Energy Efficiency Alliance (MEEA)  
Leah Scull, Midwest Energy Efficiency Alliance (MEEA)  
Karen Lusson, Illinois Attorney General's Office  
Kelly Shelton, Shelton Solutions  
Blaine Fox, CMC Energy  
Barbara Richardson, Legal Assistance Foundation of Metropolitan Chicago

### **Attendees (by phone)**

Gary Ambach, Seventhwave  
Juan Arias, Enterprise Community Partners  
Evelyn Zwiebach, Enterprise Community Partners  
Koby Bailey, Peoples Gas/North Shore Gas  
Kristi DeLaurentiis, South Suburban Mayors and Managers Association  
Nicki Fioretti, Illinois Housing Development Authority (IHDA)  
Mary Ellen Guest, Chicago Bungalow Association  
Gillian Wiescher, Chicago Bungalow Association  
Haley Keegan, Resource Innovations  
Wade Morehead, Leidos  
Julia Sander, Leidos  
Jennifer Morris, Illinois Commerce Commission Staff  
Danisha Hall, Illinois Commerce Commission Staff  
Lauren Pashayan, Land of Lincoln Legal Assistance Foundation  
Julie Vahling, AARP  
Deniz Whittier, CLEAResult  
Stacie Young, Community Investment Corp. (CIC)  
Ellen Craig, Enovation Partners

### **Introductions (Annette Beitel, Facilitator; Pastor Vance, Faith in Place; and Juliana Pino, LVEJO)**

- Annette Beitel, Facilitator – introduction of Pastor Vance, Faith in Place, and Juliana Pino, LVEJO
- Introductory comments from Pastor Vance and Juliana Pino
- Introduction of utility IQ leads – Molly Lunn, ComEd; Omy Garcia, Peoples Gas/North Shore Gas; Chris Vaughn, Nicor Gas
- Roundtable introductions – in-person attendees

## **Small Group Breakout – Introductions and Metrics**

### ***Breakout Questions:***

1. What type of work does your organization do?
2. What would you like to see out of involvement in this Committee in 2018?
3. Suggested metrics for success from this Committee in 2018?

### **Julie Hollensbe, ComEd – Small Group 1**

- Discussed goals of the Committee, what would make it successful, and potential metrics.
- We need to understand feedback at the residential customer level. What do they need, what do they value out of the programs? Are the programs matching the needs of the community?
- Are we identifying the right community organizations to be invited and participate in the discussions?
- We want to ensure the Committee is a good use of the community organizations' time.
- We want solutions that can be replicated; solutions should be customized to meet individual community needs.
- We want to develop relationships that are long-lasting.
- We want to make a change; we want to move beyond what has happened in the past.

### **Pastor Vance, Faith in Place – Small Group 2**

- We need to move from transaction relationships to transformative relationships.
- Utilities need to think outside the box. We have to keep each other honest and accountable; that is the only way to see success.

### **Juliana Pino, LVEJO, Small Group 3**

- Discussed what people want to get out of this Committee
- Diverse communities are very underserved, both in accessing programs and in job development.
- How do we measure program delivery?
- How do we track job creation in the communities that are benefitting programs?
- Getting information out to communities – how do we make sure to meet in different neighborhoods, rotate where we are meeting, and partner with community-based organizations?
- There is a need for additional tracking – such as involvement from NGOs and small businesses.
- Utilities want to listen and change programs in response to feedback/the needs of communities.
- IQ EE program participation – number of participants from CBOs; level of participation within communities; is this increasing over time?
- We need to hear back from utilities on the performance of programs.
- How are we supporting program participants past the point of enrollment?

- This Committee is an important coordination space – how are the different providers offering programs and working together?
- We will need to check-in with community-based orgs – do you feel like this is a good use of your time? What could be a better use of your time? Consider changes to the format of the Committee, if necessary.

#### **Laura Goldberg, NRDC, Small Group 4**

- Understand how to implement the Future Energy Jobs Act; how can Committee participants play a role in this?
- How to use EE programs to the fullest extent?
- Reduce confusion on programs; reduce barriers to program participation; make it easier to understand applications.
- Make sure this Committee is an equitable and inclusive forum.
- Make sure program feedback is heard and that it is taken into account to change programs.
- This Committee should involve meaningful collaboration and a comfortable open space.
- It's important to meet community groups where they are located.
- Benchmarks of success:
  - Breaking down silos.
  - The importance of reaching the communities these programs are intending to serve; we are all trying to serve the same communities.
  - Committee participants need to see the value in participating.

#### **Luis Diaz-Verez, ComEd External Affairs, Small Group 5**

- Altgeld Gardens could be a good location for a future pilot program.
- How to engage smaller organizations to deliver the message and the services. A lot of this work is being done by large groups that are not as deeply connected to the grassroots organizations. Program and message feels “top down.” Changes and other mechanisms need to be created so that smaller organizations with more limited capacity can participate.
- Eliminate barriers to program participation.
- Building visibility – how do we know who is participating in programs?

#### **Dawntawn Nicholson, ComEd, Small Group 6**

- Getting feedback from community groups that are serving income-eligible customers is important. Utilities want to hear feedback so that it can be incorporated.
- Making changes to programs as the utilities get feedback; how can we change programs and make them better?
- Work to break down barriers and improve trust within communities.
- How to incorporate baseline studies to better serve communities – using data to improve programs?

### **John Pady, CEDA, Small Group 7**

- Pull resources together to properly allocate to customers receiving services.
- How can we make sure people understand programs, and that customers are receiving the full benefit of programs?
- Brand the programs to support a uniform message. Collaborate with community-based organizations.
- We need to be innovative.
- Listening and learning is very important.
- How do we get organizations to the table that aren't here; who are they?
- Roundtable discussions to get feedback from customers that have been served; how do the utilities take this feedback into account?

### **Ashley Palladino, Resource Innovations, Small Group 8**

- Establish a path forward – how can we develop an implementation plan to achieve the goals of FEJA?
- Changes may be needed to ensure customers are being served.
- Open dialogue – participants should be free to share opinions.
- There are more organizations that will be interested in participating.
- Ensure geographic representation across the service territory.
- Ensure that actual, equitable benefits are reaching the communities they are intended to reach. Hold one another accountable.
- Track participation – look at very specific and regional participation.

## **Overview of 2018 IQ North Plan**

### **Process – Annette Beitel, Facilitator**

- We expect that the Committee process will evolve over time. If you have questions or feedback on the meeting structure, please share it with the facilitators.
- We will be setting up an Advisory Committee-specific website to post meeting materials and resources for participants.
- We are working to address barriers for CBOs to participate
  - ComEd will offer a per diem for CBOs
  - Outreach to additional CBOs; who else do we need to reach?
  - The facilitators will meet individually with interested CBOs, as needed.
- Facilitators will send out a survey on meeting location to request feedback on future meetings
- Overview of topics for 2018

### **Small Group Breakout – Feedback on IQ North Plan**

#### ***Breakout Questions:***

1. Suggestions on process – any additional thoughts on process?
2. Presenter suggestions?
3. Best way to get feedback on topics?

#### 4. Any additional topics for 2018?

##### **Julie Hollensbe, ComEd, Small Group 1**

- Job creation/workforce development:
  - How will data be collected?
  - How do we know that additional jobs have been created?
  - What is the source of this information?
  - What types of jobs?
- Link organizations with workforce training and those that are hiring.
- Discuss marketing and outreach.

##### **Pastor Vance, Faith in Place, Small Group 2**

- There needs to be conversations about expectations in workforce development.
- Ensure that people are being trained based on the needs.
- Make the connection to solar training + solar jobs.

##### **Delmar Gillus, Elevate Energy, Small Group 3**

- Interconnectivity is important, specifically holding meetings within communities. Are we planning these meetings in a way that we are addressing topics that community groups are interested in? For example, community groups are interested in talking about rates.
- Process – how are we connecting the North and the South Committees so that benefits from our discussions are shared?
- Process for coming up with future agenda topics. Should we have meetings focused on specific topics, for specific audiences? Or should we cover a number of topics at meetings? Everyone participating should have a general understanding of all of the topics, but it may be effective to focus agendas based on where the meetings are held- the needs/wants of those communities. Work with community leaders on agendas.

##### **Laura Goldberg, NRDC, Small Group 4**

- Jobs and community development – make a connection to the solar side of FEJA.
- 20% of jobs within EE coming from minority and women-owned businesses. We need a better understanding of the current requirements to implement EE programs.
  - How can requirements be improved?
  - There are job groups not in the room – they need to be engaged.
  - What types of certifications are necessary? Who is offering them? Is it costly? What type of resources are required?
- Marketing and outreach – need for streamlining; coordination; an easy to use portal. Community Action Agencies need to be providing this message.
- Reporting and tracking – tracking the energy burden; how many audits are being done; how many deeper retrofits are being done?
- Process – suggests a benchmark halfway through the 1<sup>st</sup> year to see how we are doing.

- Ensure that the process isn't overly formal.

#### **Ashley Palladino, Resource Innovations, Small Group 5**

- We need to ensure we have the right stakeholders in the room. For example, ComEd has External Affairs people here that draw on specific expertise.
- There are other partners in communities that have opportunities to share; looking more broadly is important.
- Building trust is important; acknowledging how we got here; being forward thinking to create solutions.
- Focus groups – we should engage customers further to get feedback.
- Some organizations may not be comfortable in this setting.
- Test different methods to reach customers.

#### **Luis, ComEd, Small Group 6**

- The job development message should be to support careers rather than jobs.
- Engage incubators and accelerators – to help small entrepreneurs get involved.
- There is value in co-branding between the utilities and local service providers / local non-profits. For example – a yard sign linking the utility offering the program with a local community group.

#### **Noelle Gilbreath, Community Investment Corp., Small Group 7**

- Defining goals for the Committee Plan – if there is a mission or vision statement, is it clear what we are working toward? If we don't have one, we need to create one.
- Suggested format for future Committee meetings – offer workshops on specific topics and report back out.
- Use the new website to post materials and to provide transparency for those not available to attend Committee meetings.
- Jobs – it needs to be easier for people in the community to get these jobs. For example, there will be a shortage of HVAC technicians in the near future.

#### **Jacob Stoll, ComEd, Small Group 8**

- Non-Energy Benefits and how to quantify; how do we get those into the TRM; how do we measure?
- Career / long-term employment.
- Need to engage a wide variety of organizations; this is a step forward for all of us.

#### **Lunch Break**

## **Overview of Income Qualified EE Programs (Molly Lunn, ComEd; Chris Vaughn, Nicor Gas; Omy Garcia, Peoples Gas/North Shore Gas)**

### **ComEd Presentation – Income Qualified EE Programs (Molly Lunn, ComEd)**

- Overview of IQ EE programs
- Coordination with gas utilities – Nicor Gas and Peoples Gas/North Shore Gas
- ComEd is planning three neighborhood “blitzes” in 2018, to focus on specific neighborhoods for income qualified EE programs. The first will be in Bronzeville, and the second two locations are TBD.

### **Nicor Gas Presentation – Income Qualified EE Programs (Chris Vaughn, Nicor Gas)**

- Overview of IQ EE programs
- Offer many joint programs with ComEd
- Working to develop partnerships; looking for feedback to better serve the community

### **Peoples Gas/North Shore Gas Presentation – Income Qualified EE Programs (Omy Garcia, Peoples Gas/North Shore Gas)**

- Overview of IQ EE programs
- All programs are joint with ComEd

## **Small Group Breakout – Community Needs**

### ***Breakout Questions:***

1. What are the energy needs of your community?
2. Do you see any gaps in energy efficiency programs?
3. What is the best way to communicate EE program information?
4. Are you interested in an energy efficiency information session this spring?

### **Julie Hollensbe, Small Group 1**

- Include the educational component to EE, to ensure participants continue to benefit from a program. What is the message?
- Grassroots education is important.
- How can we better identify the organizations that have relationships that can be leveraged within the communities?

### **Pastor Vance, Faith in Place, Small Group 2**

- Need to help educate people about technology; the technology needs to be reinforced with education.

### **Luis Diaz-Perez, ComEd, Small Group 3**

- Larger appliances / larger items in the home; window and doors; are they adequately addressed in these programs?
- LIHEAP \$ is not enough, what can be done?
- Exterior lighting is an unmet need.

- What are the non-energy related benefits of participating in EE programs?
- Gaps – disconnection policies of the utilities. There is an interest in making a connection between EE programs and avoiding disconnections.
- Greater education about usage habits is needed.
- Advertising; concern there is too much reliance on bill inserts.
- Additional focus group research can help utilities learn how to better reach customers.
- Door to door “blitzes” to engage customers.
- Energy efficiency isn’t a “user friendly” term. Is there another way to talk about it?
  - For example – consider how the federal government promoted the use of FAFSA applications in specific communities. Can spokespeople be tied into getting the word out about EE programs?

#### **Molly Lunn, ComEd, Small Group 4**

- Health and safety needs – how to address these needs of communities and talk to people about this.
- Gap – for research & development, more community engagement is needed.
- Gap – the tie to solar. Need to ensure we are coordinating with solar groups.
- Gap – workforce development.
- Gap – how do we engage groups outside of the Chicagoland area?
- Challenge – customers have been contacted by Alternate Retail Electric Suppliers and may be skeptical of EE programs. Utility representatives need to be able to explain this to customers.
- Utilities should consider trying new ideas as pilot programs.
- Segmenting – what is offered to single family customers may differ from multi-family customers.

#### **Laura Goldberg, NRDC, Small Group 5**

- Be mindful that we need more community groups in the room to answer this question.
- Health and safety issues; safety concerns around light accessibility.
  - Mold, asbestos, leaky roofs, indoor air quality, pests
- The need for affordable housing, but subsidized and unsubsidized. For owners, EE can mean lowering their costs.
- Medical bills, energy burden, etc. are higher on the list to disadvantaged communities.
- Outreach ideas:
  - Utilizing employers where income-qualified customers are employed
  - Community groups
  - Neighborhood organizations
  - Churches
- It’s important for marketing to be done by community groups and by community leaders.
- Program example: Elevate Energy’s ‘house party’ model; neighbor to neighbor connection is important.

- Providing things like gift cards to get people in the room.
- How to tie in efficiency and solar?

### **Ashley Palladino, Resource Innovations, Small Group 6**

- Reliability issues – not getting to the point of having your power shut off.
- Tenants that do not have control over their heating systems.
- Gap – changing the way we engage with communities. Utilities have a unique opportunity to increase investment.
- Link to health services.
- Link to job opportunities.
- Connect to other initiatives, such as the Robert Woods Foundation.
- Think about messaging.
- Think about what might disqualify a customer; if they are not eligible, there is something else to offer them?

### **Karen Conrad, ComEd, Small Group 7**

- Remediation – asbestos, mold, other issues. What can we do? Is there funding that can help with this?
- How do customers access the programs we have? Are applications easy or difficult?
- How to provide more information to customers when it is needed?
- Multifamily – after the initial direct install, how do we those customers further engaged?
- Community ambassadors and word of mouth is the best way to communicate program information.
- Education to customers on energy efficiency is important.

### **Chelsea Lamar, Navigant, Small Group 8**

- How to reach underserved areas?
- How is the outreach from implementer contractors and Community Action Agencies happening within communities?
- How can the utilities regain the trust of customers? For example, how do we overcome distrust due to Alternate Retail Electric Supplier issues?
- ICC certification for contractors – how does that fit into the larger conversation?
- Additional outreach needs – how do we reach communities? How do we reach communities that may not be as organized as others?

### **Safety Message (Tassany Campbell, ComEd)**

## **Next Steps (Annette Beitel, Facilitator)**

**Notes and Tracker:** The facilitators will organize notes and add follow-up items in a tracker. This will be shared with the IQ North Committee.

**Peoples Gas/North Shore Gas IQ Programs:** Omy Garcia will provide a more detailed presentation with program information. Facilitators will post this on the website

**Member Application:** The facilitators will share the Member Application for per diem stipends to community-based organizations.

**Follow-Up Survey:** The facilitators will circulate a follow-up survey to the IQ North Committee. Survey responses are due by **Friday, April 27**.

**Additional community-based organizations:** If you have input on additional groups that should participate, please send to [Celia.Johnson@FutEE.biz](mailto:Celia.Johnson@FutEE.biz).

**Upcoming meetings:** The IQ North Leadership Team will review meeting dates and provide an update soon.

**General Feedback:** If anyone has any feedback or questions about the IQ North Committee or the meeting structure, please contact Celia Johnson ([Celia.Johnson@FutEE.biz](mailto:Celia.Johnson@FutEE.biz)).