

Income Qualified EE Advisory Committee North

Attendee List and Meeting Notes

Tuesday, May 22, 2018

10:00 am – 2:15 pm

ComEd – Chicago Training Center
3536 S. Iron Street, Chicago, IL

Attendees (in-person)

Annette Beitel, Facilitation

Celia Johnson, Facilitation

Pastor Booker T. Vance, Faith in Place

Juliana Pino, Little Village Environmental Justice Organization (LVEJO)

Christina Pagnusat, Peoples Gas-North Shore Gas

Omayra Garcia, Peoples Gas-North Shore Gas

Molly Lunn, ComEd

Tassany Campbell, ComEd

Luis Diaz-Perez, ComEd

Chris Vaughn, Nicor Gas

Mike King, Nicor Gas

Cristina Fernandez, Nicor Gas

Stacey Paradis, Midwest Energy Efficiency Alliance (MEEA)

Kate Brown, Elevate Energy

Edith Makra, Metropolitan Mayors Caucus

Antonia Ornelas, Elevate Energy

Naomi Davis, Blacks in Green

Bill Risley, Franklin Energy

Jim Heffron, Franklin Energy

Ryan Young, Seventhwave

Kevin Dick, Delta Institute

Mary Lockhart-White, Community Action Partnership of Lake County

Marcia Belcher, Community Action Partnership of Lake County

Larry Dawson, National Energy Assistance Director's Association

Connor Jansen, Seventhwave

David Baker, Energy Resource Center, UIC

Karen Lusson, IL Attorney General's Office

Mary Ellen Guest, Chicago Bungalow Association

Oscar Mora Diaz, Energy Resources Center, UIC

Stefano Galiasso, Energy Resources Center, UIC

Ashley Palladino, Resource Innovations

Michelle Pulce Flynn, IACAA

Ellen Sargent, Chicago Housing Authority

Leanna McKeon, Chicago Housing Authority

Charles Ivy, Waukegan Housing Authority

Sharful Haq, Waukegan Housing Authority

Patricia Islas, Community Organizing on Family Issues (COFI)
Donna Carpenter, Community Organizing on Family Issues (COFI)
Dan Maksymiw, CEDA
Harold Rice, CEDA
Stephenie Presseller, Moraine Valley Community College
Stacy Gloss, U of I Climate Research & Training
Claire Saddler, ComEd
Noelle Gilbreath, Community Investment Corp.
Dantawn Nicholson, ComEd
Lavannya Pulluveetil Barrera, Environmental Defense Fund (EDF)
Sylvia Ewing, Elevate Energy
Angie Ziech-Malek, CLEARResult
Liliana Almazan, Brighton Park Neighborhood Council Chicago
Jennifer Chan, DuPage County Community Action Agency
Angela Hurlock, Claretian Associates
Brian Yeung, Seventhwave

Attendees (By Phone)

Jennifer Morris, ICC Staff
Marcia Derrer, Northwestern Illinois Community Action Agency
Julia Friedman, Oracle
Fred Maher, CMC Energy
Shraddha Mutyal, Energy Resources Center/UIC
Anthony Santarelli, U of I
Jacob Stoll, ComEd
Deniz Whittier, CLEARResult
Sue Wiemer, Turnstone Development
Terri Lawrence, Tri-County Opportunities Council
Alan Zais, Winnebago County Housing Authority

Introduction (Annette Beitel, Facilitator)

Tracking Document (Annette Beitel, Facilitator)

- Overview of feedback and open questions tabs.
- Request for feedback – IQ North Committee participants broke into small groups to discuss.

Summary of Small Group Feedback

Small Group 1: Sylvia Ewing, Elevate Energy

- Discussed Local and diverse job creation
 - It's important to have an accessible and transparent process that includes a roadmap, a career ladder that is goal oriented, and goals that are connected to job placement and contracts, so that people know what qualifications are needed.
 - Need to ensure this has equity and is measurable.

- Review the overall pipeline so that people know what they need to do if they are a worker; how they need to be certified; need to ensure that contractors and others have the information they need.
- We want measurable goals and metrics.
- We want to make closed loop systems open for all.

Small Group 2: Michelle Pulce-Flynn, IACAA

- Discussed job creation and recruitment –
 - How can job fairs be utilized?
 - How utilities can assist CAAs in the recruitment process? How to best use interns, such as through the intake process?
 - How can we access the retiree population? Seniors with skills are great assets.
 - How can we recruit from other industries?

Small Group 3: Kevin Dick, Delta Institute

- Discussed local and diverse job creation –
 - Are we focused on jobs on the ground, or jobs that are upstream?
 - There should be a focus on counting jobs that are doing actual installs.
 - There should be a focus on permanent jobs.
 - How are jobs being tracked? There are resources available to help track this information; doing a focused data collection initiative is not necessary and would increase administrative costs. There are creative ways to track jobs, such as using a proxy.
 - Workforce development – There is a benefit to having a top-level approach that is coordinated. We should make this “administrator light” to reduce costs.
- Discussed non-energy benefits –
 - Good housing = good health.
 - Are there ways to capture this information through surveys or other “administrator light” touches?

Small Group 4: Stefano Galiasso, ERC/UIC

- Discussed job creation –
 - How can we open up these networks? How do we bring in people that are currently outside of the EE industry? How do we track and measure the job creation that occurs at the community level?
- Discussed marketing and outreach –
 - How do we reach underserved areas?
 - We should track participation geographically, to identify areas with lower program participation.

Small Group 5: Dantawn Nicholson, ComEd

- Discussed ICC Certification for contractors –
 - Certification helps protect the EE investments, the safety of utility customers, and ensures that contractors adhere to requirements.

- Guidelines should be developed to improve access to the ICC certification.
- Discussed LIHEAP funding –
 - Conduct an analysis to ensure LIHEAP is benefiting utility customers as it should.
 - Emphasize energy efficiency to help avoid the need for LIHEAP.
- Discussed larger appliances –
 - Offer rebates on larger appliances, such as stoves and humidifiers.
 - Offer on-bill financing for larger appliances; ensure they are ENERGY STAR-rated or energy efficient.

Small Group 6: Angela Hurlock, Claretian Associates

- Discussed marketing –
 - Customers on the wait list should understand that additional opportunities are available.
 - Coordinate with festivals, other events to educate people / ensure they are aware that IQ EE programs exist.
 - How can we incorporate non-traditional, trusted community voices (such as daycare, churches, etc.)? Co-locate services, for example.

Small Group 7: Cristina Fernandez, Nicor Gas

- Discussed how to connect the North and South Advisory Committees –
 - This should be addressed by the North and South Leadership Teams. Utility participants are in both groups, so that is another way to ensure the communication is being shared.
 - IACAA can also help with this.
 - Highlight the main topics that are discussed at each North/South meeting.
- Discussed how to reach community groups –
 - Try other communication tactics for participants that are not able to participate in-person meetings. Examples: Survey over the phone or by email; schedule one-on-one visits to organizations.
 - How can we tailor efforts to each organization's need?
- Discussed marketing and outreach –
 - How do we make sure that when a customer calls the utility about issues paying their bill, utilities are able to offer ways to assist?
 - Reach out to past LIHEAP participants about IQ EE Programs.

Icebreaker Exercise (All)

- Small group discussion – in-person IQ North Committee participants split into two groups.

IQ North Committee participants anonymously answered the question: “My biggest concern for this committee is that...”

- Not enough representation from the communities (those being served and underserved).
- Making sure that discussions lead to specific actions that can be implemented to improve delivery of IQ programs.

- That people will see it as “going through the motions” or a waste of time.
- Our impacts will be swift and long lasting.
- Can we implement what we are trying to accomplish?
- Implementing all feedback from the group may be challenging. We need to strategically identify some big wins for all stakeholders and customers and develop a collective plan for implementation.
- How will the Committee reach new communities that don’t yet have community organizations supporting them? New Latino populations in collar counties, for example.
- Ensuring that community members accessing services (EE IQ programs) are able to meaningfully participate so changes to the programs are truly based in their needs and perspectives.
- That the impact meets community needs and the letter and spirit of the Future Energy Jobs Act (FEJA).
- That the “good old boys” with the massive head start, capital and relational connections will continue to use most of the market opportunity with no respect of understanding of how equity must operate.
- That we won’t think outside of the box enough!
- That the meetings and recommendations result in actionable, measurable, real impacts.
- More realistic and accessible to people who really need help.
- Establish clear goals and objectives for what they are seeking to accomplish. Direct their attention to the goals and objectives, limiting distraction. Resolve funding questions.
- That community engagement isn’t as expansive as it could be – reaching all populations that qualify.
- Communicating opportunities (EE programs, jobs) to communities who can benefit most.
- That our efforts are not translated to the community and the participants.
- A voice is not heard – meetings with no action.
- The communities and utility customers that could benefit the most from IQ EE programs may be the hardest to reach and will require sustained efforts and budgets from the utilities to continually address their needs.
- How to turn conversations and plans on paper into action? Two examples: First, Our organization has reached out to several groups in the IQ community to ask for assistance on outreach to widen our scope. No responses. Second, our weatherization contractor has attended a meeting with some members of the Committee about jobs. They were hiring, but no one contacted them.
- That the ideas and concerns of community representatives and the CAAs are acknowledged but then not acted upon.
- That all the diverse “ethnicities” in communities may not be represented at the meetings. Asian, Latino, Indian-American, etc.
- Making sure there is community member participation. Community organization decision-makers that are actually impacted by the issues.

- Will agencies be invited to participate or how would you reach out to other agencies to participate in these meetings?
- There are a lot of great resources in the room giving awesome ideas – but how is action being taken after these meetings to make the program successful?
- The risk that the Committee focuses so much on small details that it loses sight of the big picture goals.
- That job training opportunities will not be communicated.
- It may not be 100% representative of all the communities and IQ customers it was designed to.
- That resources are not available for full implementation.
- To make a group isolated in an “ivory tower” that is out of touch with the needs and perceptions of the people we are trying to serve.
- Understanding how my input will help guide decisions – how am I really useful?
- The group will become too technical which will decrease CBO participation.
- Ensuring we have diversity of thought and a forum for all participants to speak up – share feedback, concerns, and hold each other accountable.
- Identifying which ideas are worth proving and which ones should be left for phase II. How do we prioritize?
- People will not feel comfortable speaking up about how they really feel due to the group nature / format.
- That there will be lots of discussion, but not as much action.
- We need more ways to get people to be on the Committee.
- How will we measure and track success of the Committee’s progress?
- We design the programs for the administrators of the program and don’t take the time to understand what income qualified customers want and need.
- That the organizations that currently partner will not work together and “strangers” will remain “strangers” causing silos. We know that’s a bad idea and outcome.
- That the suggestions we make / feedback we have don’t lead to changes in the utility programs. And if there are changes made they won’t be made in a transparent way.
- That the diverse and perhaps sometimes divergent objectives can be distilled into clear and concrete guidance for the program.
- With the large amounts of topics discussed in a large group setting, it will be difficult to achieve goals in a timely manner.
- Making sure the Committee’s goals / objectives are aligned with what the member organizations have the ability to control / influence.
- Not enough consideration will be given to what is already working in the community. Not recreating the wheel.
- Expectations of CAA network to ramp up without resources.
- A clear direction on the purpose of the Committee and the impact that it will have on the overall project.

Summary of Key Comments

Small Group Feedback:

- Make sure that actions/changes are implemented and are transparent.
- Consider prioritization; we are trying to take on a lot in this space. There are topics that may need to be addressed in the future.
- Make sure those doing the work in the field have access to the Committee.
- Job training process – ensure there is a roadmap. There needs to be a process flow. For example, make sure there is clear ownership; connection points; contact information that can be shared.
- Concern about this group being too technical.
- There should be accountability and ownership on specific tasks and follow-up from Committee meetings.

Lunch Break (Remarks from Pastor Vance)

ComEd Presentation: Marketing and Outreach for IQ Programs (Molly Lunn, ComEd)

- There is a ComEd website dedicated to IQ programs – <https://www.comed.com/WaysToSave/ForYourHome/Pages/IncomeEligible.aspx>
 - Follow-up: ComEd is open to feedback on the website.
- ComEd developed a new brochure for IQ programs.
 - Follow-up: The ComEd IQ EE programs brochure will be available at the next meeting and ComEd is interested in feedback.
- ComEd is holding large events and small workshops about the IQ programs. ComEd is interested in offering more small workshops.
 - Follow-up: If anyone has feedback or ideas, send suggestions to Tassany Campbell (Tassany.Campbell@ComEd.com).
- Neighborhood “blitz” idea – focusing this year on IQ programs. In 2018, in Bronzeville, South Suburbs, Aurora/West Chicago. In 2019, considered Rockford, Englewood (Chicago) and Austin (Chicago).
 - Follow-up: “Blitz” locations are tentative for 2019; ComEd is happy to take suggestions for locations.
- Utilities are working on regular coordinate with each other; most programs are jointly offered.
- Question – how will ComEd track results from campaigns?
 - ComEd will present results from the multi-family campaign, and likely lighting, at the end of the year.

Nicor Gas Presentation: Marketing and Outreach for IQ Programs (Cristina Fernandez, Nicor Gas)

- Overview of tactics that have been successful in the past. Nicor Gas is open to feedback.
- Coordinating messaging with other utilities, so that customers get a consistent message.

- Future presentation on the results of campaigns – Nicor Gas will come back to the IQ North Committee and report-out on results of various campaigns, at the end of the year.

Peoples Gas-North Shore Gas Presentation: Marketing and Outreach for IQ Programs (Omayra Garcia, Peoples Gas-North Shore Gas)

- Peoples Gas/North Shore Gas works closely with the Government and Community Relations Team.
- Will consider how to target people on the waiting list.
- Organizations look to sponsorship opportunities.

Large Group Discussion on Marketing and Outreach

- **Coordination with Local Partners:** Additional coordination with local partners would be helpful.
 - Facilitators will post utility event information on the new IQ Advisory Committee website.
 - Follow-up: Facilitators will follow-up and get the event lists from utilities; circulate it and post on the website.
 - Follow-up: If there are events that utilities should be aware of/participate in, send to Celia (Celia.Johnson@FutEE.biz) and it will be shared with the IQ North Leadership Team.
- **Feedback on Programs:** Who should people contact if something is going wrong with programs in general?
 - Intake staff at CAAs have resource guides in the community; they know who to contact at the utilities. The intake process is likely very diverse and may differ depending on the organization. There could be a disconnect with Executive Directors at the top.
 - **Future Discussion on Intake Process:** Committee participants may not know how the intake process works; there should be an open discussion at a future meeting on communications to ensure it runs smoothly. Include examples of problems that have been experienced.
- **IQ Fact Sheet:** Create a short fact sheet that lists all IQ programs in Illinois with the “big picture” details on programs, with a phone number for each.
- **Mobile-friendly information:** IQ program information should be mobile-friendly and available on a variety of platforms (for example, downloadable by PDF but also easily viewable on a phone).
- **Marketing to customers:** Think about giving people information that is useful and doesn’t “end up on the ground.”
 - This is also a consumer protection issue.
 - There is a wealth of resources and experiences that we can learn from each other.
- **Barrier – administration aspects of participation:** A barrier to participation may be the administrative aspects of participation. Making a phone call, making an appointment, etc.

- **Feedback on neighborhood “blitz” idea:** Q for service providers – is it a better structure for “neighborhood blitzes” to be more focused on actual participation vs. program awareness? For example, would knocking on doors to execute energy assessments be effective?
 - In the city of Chicago, there are block parties that are coordinated through Aldermen’s offices. There could be a connection made with IQ EE programs and block parties.
 - Canvassing the neighborhood could be an issue because the programs are income qualified. Will everyone be qualified in the neighborhood?
 - Utility partners should go to local CAAs and see how they operate.
 - Utilities could reach out to CAAs to ask for x number of houses to participate in a program.
 - Neighbor-to-neighbor connections are important.
 - EE program blitzes should be promoted to ensure people in the community know you are coming and understand the program/what is expected/how to participate.
 - It can be difficult for people to schedule getting EE work done. One challenge – people don’t pick up their phone to schedule an assessment when a number calls that they don’t recognize. Another challenge – a person without voicemail set up.
 - Need to break down barriers; think differently about how to reach customers.
 - Hold customers’ hands through each next step.
 - Hold a joint event “blitz” to 1) sign up participants and 2) get the work done.
 - Partner with Aldermen’s offices. This can help ensure safety for a “boots on the ground” approach. We need community ambassadors that are trusted and known. This can also help ensure that participants understand these programs are being offered by utilities, not alternative suppliers.
 - Many properties have deferred maintenance; this is an issue that program administrators should be aware of.
- In reaching out to customers, consider that there are various levels of income qualified.
- Delta Institute has worked on a notification system that could be helpful to share program information.

Proposed IQ North Committee Goals (Chris Vaughn, Nicor Gas)

- Goal 1 – Bridge Building. Removing barriers that exist within the communities that both diminish participation, overall effectiveness of service providers. This is also about enhancing communications about all the players. Develop a bridge of trust between communities. Use trusted voices to penetrate communities.
- Goal 2 – Complete Integration – e.g. Increased Participation and Job/Career Development. Not only increasing customer participation but increasing the roles that community members can play in delivering EE. Integrated approach is needed – EE is for all. Focus on completing the pipelines for various roles. After getting certifications, then what happens?

- Goal 3 – Develop Sustainable Solutions. Efforts should have long-term consequences. The communities themselves should feel empowered to sustain what is going on; contribute to their own well-being. Developing sustainable careers for EE.

Feedback on Proposed Goals

- Goals should be multi-generational.
- Consumer protection should be added.
- Continuing education should be added, as part of the jobs/careers goal. Trainings are necessary to ensure marketability within the field. Technology evolves over time.
- Customer education should be added. Customers may not understand what EE means.
- The proposed goals sound more visionary; we should transfer these into goals that can be measured. A task for this group should be to create an org chart and a process flow map.
 - Follow-up: Facilitators to request interested Committee participants for a small group discussion of goals/metrics. If you are interested, email Celia (Celia.Johnson@FutEE.biz).

Next Steps (Annette Beitel, Facilitator)

Notes and Tracker: The facilitators will organize meeting notes and update the Tracker Document to be shared with the IQ North Committee.

Icebreaker Exercise: The facilitators will include a summary of feedback notes in the Attendee List and Meeting Notes document.

Member Application: The facilitators will share the Member Application for per diem stipends and travel expense reimbursements to community-based organizations; applications will be accepted on a rolling basis. Send applications to Celia.Johnson@FutEE.biz. If you have any questions about whether your organization qualifies, please reach out.

Follow-Up Survey: The facilitators will circulate a follow-up feedback survey to the IQ North Committee, including questions from the agenda on utility marketing and outreach presentations. Survey responses are due by Friday, June 1.

Goals/Vision Statement Small Group Discussion: Email Celia.Johnson@FutEE.biz by Friday, June 1 if you are interested in participating in a small group follow-up teleconference to refine goals/metrics for the IQ North Advisory Committee this year and help develop a strawman vision statement for the Advisory Committee.

Job Postings: Future Energy Enterprises has open positions for a Senior Policy Analyst and Summer Intern; the facilitators will circulate job descriptions to the IQ North Committee.

ComEd Presentation on IQ EE Program Marketing and Outreach:

- ComEd is open to feedback on the IQ EE program website – <https://www.comed.com/WaysToSave/ForYourHome/Pages/IncomeEligible.aspx>
- The ComEd IQ EE programs brochure will be available at the next meeting and ComEd is interested in feedback.
 - Facilitators to add this topic to the next meeting agenda.
- ComEd is holding large events and small workshops about the IQ programs. ComEd is interested in offering more small workshops. If anyone has feedback or ideas, send suggestions.
- Neighborhood “blitz” idea – in 2019, considered Rockford, Englewood (Chicago) and Austin (Chicago). “Blitz” locations are tentative for 2019; ComEd is happy to take suggestions for locations.
- **Feedback for ComEd – send to Tassany Campbell (Tassany.Campbell@ComEd.com).**

Coordination Between Utilities and Local Partners on Events:

- Facilitators will follow-up and get the event lists from utilities; circulate it and post on the IQ Advisory Committee website.
- If there are events that utilities should be aware of/participate in, send to Celia (Celia.Johnson@FutEE.biz) and it will be shared with the IQ North Leadership Team.

Next Meeting: Anticipated in July (date TBD)