

Income Qualified EE Advisory Committee North

Tuesday, December 11, 2018

10:00 am – 2:00 pm

Attendee List and Meeting Notes

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

Attendees (In-Person)

Annette Beitel, Facilitation Team
Celia Johnson, Facilitation Team
Theo Okiro, Facilitation Team
Donna Carpenter, COFI
Briana Parker, Elevate Energy
Jackie Nagel, Nicor Gas
Briana Reed, ComEd
Jim Heffron, Franklin Energy
Don Westin, Franklin Energy
Jenny Rile, Elevate Energy
Ashley Palladino, Resource Innovations
Erica Borggren, ComEd
Claire Saddler, ComEd
Aimee English, Citizens Utility Board
Kara Schwer, ComEd
Leanna McKeon, Chicago Housing Authority
Stefano Galisso, UIC-ERC
Katherine Elmore, CIC- The Preservation Compact
Cate York, Citizens Utility Board
Cheryl Johnson, People for Community Recovery
Chris Vaughn, Nicor Gas
Marsha Belcher, Community Action Partnership- Lake County
Sonya Lewis, SML Communications
Anthony Santarelli, SEDAC
Nick Dreher, MEEA
Paula Robinson, Bronzeville Community Development Partnership
Chelsea Lamar, Navigant
Mark Szczygie, Nicor Gas
Lisa Miranda, Rebuilding Together
Laura Goldberg, NRDC
Yami Newell, Elevate Energy
Mike King, Nicor Gas

Pastor Booker Vance, Elevate Energy

Attendees (By Phone)

Diane Alford, Kendall County

Cheryl Miller, Ameren Illinois

Emily Klein, East Central Illinois Community Action Agency

Jasmine Gunn, Claretian Associates

Delmar Gillus, Elevate Energy

James Carlton, People for Community Recovery

Malika Jayaraman, Navigant

Brian Yeung, Seventhwave

Jennifer Morris, ICC Staff

Mary Ellen Guest, Chicago Bungalow Association

Christina Pagnusat, Peoples Gas - North Shore Gas

Gina Strafford-Ahmed, DuPage County

Lauren Kriz, Peoples Gas - North Shore Gas

Christie Hicks, Environmental Defense Fund (EDF)

Jennifer Lewis, Will County Center for Community Concerns

Catie Nelsen, Illume Advising

Elena Savona, Elevate Energy

Introduction (Annette Beitel, Facilitator)

- This meeting will feature the updates the utilities have made to their Income Qualified marketing and outreach strategies.

Facilitation Team Presentation: Overview of Key Feedback from Community Based Organizations – CBOs (Theo Okiro, Co- Facilitator)

- **Feedback from the IQ North Committee:**
 - It is important to ensure that affordable housing groups and property managers are included in the outreach.
 - Overall, the Committee is pleased with the outreach process.
 - It is important to consider the resource constraints and capacity of the CBO when seeking their participation and engagement in the IQ North Committee.
- **Question from Laura Goldberg, NRDC: How are the conversations structured? CBOs cannot be asked about program design.**
 - Facilitation Team: The presentation was heavy on program design because so far, meetings with CAAs have been the bulk of the outreach. CBOs are not asked about program design. They are asked about their community energy needs, awareness of the IQ North Committee and other questions specific to IQ customers.

- **Question from Anthony Santarelli, SEDAC-** Why has there been zero responses from educational institutions? And what institutions have you reached out to?
 - Facilitation Team: Community Colleges were primarily reached out to. Because they are embedded in the community and often have energy efficiency or weatherization courses/ certifications. Additional effort will be paid to engaging them in 2019.
- **Question from Nick Dreher, MEEA- What are some of the incentives to participation you emphasized to CBOs during outreach?**
 - Facilitation Team: These incentives came out of pre-planning meetings for the Committee. Many CBOs shared their travel impediments such as travel costs. The Committee developed a per diem payment to cover their expenses. Such incentives were shared at outreach meetings.

Overview of Income Qualified EE Marketing and Outreach (Karin, Konrath, ComEd)

- Bronzeville Blitz – there were 3,000+ units with assessments; 50% completed additional projects
- The blitz tactic has been very effective; it will continue in 2019.
- ComEd is interested in feedback on identifying partners and advocates in the 3 areas they will focus on for Blitz campaigns in 2019. (Follow-up Item)
- **Comment by Cheryl Johnson, People for Community Recovery (PCR)**
 - The greater Roseland area on the south side of Chicago needs additional focus. There are many organizations in the greater Roseland area that ComEd can work with.
 - ComEd is open to targeting areas outside of the ‘blitz’ campaigns. Karin (ComEd) will discuss further with Cheryl.
- **Question from Annette Beitel, Facilitator-** Part of the committee’s purpose is to promote the importance of jobs and community development in Energy Efficiency. Has ComEd considered hiring residents for blitz and community events?
 - Additionally, has ComEd been encouraging the CAAs and CBOs to do job opportunities? It is important to have job benefits for students, returning citizens, seniors etc.
 - ComEd: In marketing they are not too much in the weeds for that. Perhaps they will do local hires and job opportunities and inform other departments in ComEd responsible for job development.
- **Question from Cate York, Citizens Utility Board-** Will retailers have better discounts for the energy efficiency programs?
 - ComEd: The list is specific for IQ customers with deeper discounts.
 - Molly Lunn, ComEd- Only IQ Customers with direct mail will be able to access the link to deeper discounts.

- **Question from Laura Goldberg, NRDC-** It seems like there could be a relationship with what Theo is doing and what ComEd is marketing? Is there any talk of the Committee in the communities and how they can be able to give their input?
 - Karin is open to making those conversations and working with the communities or CBOs.
- **Question from Yami Newell, Elevate Energy–** Regarding the new online tool, what is the utilization on that and who is using it?
 - ComEd: They launched the tool in Sept. **Karin will get back to the Committee on usage data.**
- **Question from Kara Schwer, ComEd-** Can you clarify what the meaning of the terms “traditional tactics” vs “hyperlocal”?
 - ComEd: “Traditional Tactics” refer to marketing via print ads and bill inserts etc.
 - “Hyperlocal” refers to targeting a small geographic area. Hyperlocal marketing tactics are very grassroots and word of mouth.
- **Question from Yami Newell, Elevate Energy-** Regarding the focus groups and having conversations with residents and single family- what are some of the takeaways?
 - ComEd: They are still combing through the initial meetings, there are some scheduled for February 2019.
 - They are getting the residents’ ideas on marketing materials, messaging, energy savings, they created single family and thought process- LED lighting or anything else that is energy efficiency for the family.
 - They also tried to gauge little bits of information on smart thermostats, and if property owners feel there are any barriers to having smart thermostats installed. Next year they will be installing free smart thermostats in Multi-Family units. With the focus groups, the sought to get ahead of the game and see if there will be any issues or pushbacks when they are installed.

Overview of Income Qualified EE Marketing and Outreach (Jackie Nagel, Nicor Gas)

- Jackie is the Manager of EE Marketing and Communications.
- Nicor Gas worked with Community Contacts to target mobile homes in Elgin.
- **Comment from Marsha Belcher, CAP Lake County:**
 - A new market that Nicor Gas can utilize in partnership with CAAs is Head Start for families and children. That is a new market they can utilize. Head Start partnerships is a way to build a viable connection.
- **Question from Laura Goldberg, NRDC-** What happens when a customer gets a kit?

- Nicor Gas: Kits are a gateway to EE world. No current strategic follow-up involved. It is something they have been considering. How do they reengage customers that kits? Something they are looking into for 2019 and 2020.
- **Question from Aimee English, CUB** - Regarding the 65% increase in participation listed in the presentation, what timeframe is that an increase from? Is this comparing to programs DCEO was running statewide? And is the population primarily Income Eligible?
 - Nicor Gas: They are looking at communities targeted, there was a 65% increase in participation in Nicor Gas program.

Overview of Income Qualified EE Marketing and Outreach (Omy Garcia, Peoples Gas- North Shore Gas)

- Peoples Gas- North Shore Gas' strategies are very similar to the ones employed by Nicor and ComEd.
- Peoples Gas- North Shore Gas also produced a well-received television ad in English and Spanish for the holidays. The English ads are below:
 - [North Shore Gas link](#)
 - [Peoples Gas Link](#)
- Spanish television ads:
 - [North Shore Gas Link](#)
 - [Peoples Gas Link](#)
- **Question:** Is the Blitz done in collaboration with gas utilities?
 - Peoples Gas- North Shore Gas: Not this year. Although ComEd promotes their joint program and blitz.
 - Roseland will be on their area in 2019.
- **Comment by Annette Beitel, Facilitator:** Peoples Gas and ComEd had combined better branding and alignment compared to their presentations earlier this year. They responded to comments from previous meetings and have now utilized innovation and creativity for their marketing and outreach to IQ Customers. Their new strategies now include utilizing events such as the CHA warm coat drive.
- **Comment by Cheryl Johnson, PCR-** There is a population that is not digitally inclined- they will best to be continually supported via mail and inserts.
- **Question:** Is the Blitz done in collaboration with ComEd and other utilities? Are the programs being promoted jointly?
 - Peoples Gas- North Shore Gas: Not this year, though there may be a possibility in the coming years for collaboration. Franklin Energy was instrumental in finding community partnerships for Peoples Gas this year.

Small Group Breakout- Feedback on Marketing and Outreach

Questions to Address:

1. Do you have feedback about the utility marketing and for outreach plans for IQ programs in 2019?
2. What is the best way to reach IQ Customers in the communities you represent?
3. What barriers exist to reaching customers?
4. Should EE marketing and outreach be coordinated with IL Solar for All? If so, how?

Small Group 1: Cheryl Johnson, People for Community Recovery

- Barriers to reaching IQ Customers:
 - There are a lot of barriers- a lot of people don't know what EE means- we need to come up with another language on how to educate them on EE. Perhaps talk about "energy savings or energy affordability."
- Best way to reach IQ Customers in the communities they represent:
 - Perhaps we can utilize the involvement of hospitals and Community Colleges for reaching IQ Customers.
 - Educate homeowners, renters, seniors on options available to them
- EE Marketing and Outreach:
 - Integrate services – bill assistance and other services
 - We need to discuss how to integrate municipalities to outreach efforts.

Small Group 2: Jim Heffron, Franklin Energy

- Feedback on utility marketing presentations:
 - It was promising and encouraging for the utilities to do bottom up and grassroots approach to marketing.
 - It was also encouraging to see that they included connecting with CBOs in their plans.
 - They liked how tied it is to Theo's work. A more intentional partnership to outreach will help establish more CBOs relationships.
 - They like how the utilities are aligning in their brand marketing.
- Barriers to reaching IQ Customers:
 - Trust came up as a barrier
 - Question- How are we defining trust? There are different types of trust. People have different understanding for trust
- Coordinating EE Marketing with IL Solar for All:
 - Question – How will solar 4 all overlap with program mechanisms and goals.
 - How will solar 4 all overlap with the IQ North Committee?

Small Group 3: Katie Elmore, Community Investment Corporation

- Feedback on utility market presentations:
 - Brand awareness and brand recognition should be first step for direct mailers. Introduce the residents to the utility, then send a follow-up mail about the programs. Some residents may be unfamiliar with the utility.
 - After this, it will be easier to deliver program information.
 - Talking to public sector programmers may not be helpful.
 - IQ Customers that are tenants vs. building owners- tenants may not be able to act on EE programs compared to tenants. This must be addressed.
- Coordinating EE Marketing with IL Solar for All:
 - Solar 4 all should not be tied into because they are distinct. Can EE be used as a gateway to talk about solar?

Small Group 4: Marsha Belcher, Community Action Partnership – Lake County

- Best way to reach IQ Customers in the communities they represent:
 - CAAs are very good with finding IQ customers. They are a resource that has been underutilized in outreach.
 - CAAs also provide housing help find people with higher AMI, those people with higher AMI need to start outreach with each other. As the information grows, they can do a better job of reaching customers with higher income.
 - We must be weary of the trap in using data to determine pockets of poverty. IQ Customers with 80% of AMI may not be living with high poverty.
 - How do we not take the easy route of where there is a high concentration to finding the where and what they do?
 - In Lake County a lot of people fish- targeting this segment of population is not an outreach CAP currently does, but these people may fall into 80%.
 - It is important to be more creative and in people who lifestyle and not rely solely on data.

Small Group 5: Yami Newell, Elevate Energy

- Feedback on utility market presentations:
 - It is great that the focus is on IE customers.
 - Perhaps we can think of a more holistic savings strategy. Move people across participation spectrum. Maybe they will be a great candidate. Tie EE with demand response. Multiple programs will help maximize or leverage savings.
- Best way to reach IQ Customers in the communities they represent:
 - Trusted messenger- who are the right people to reach out to that can help convey messages?

- Barriers to reaching IQ Customers:
 - Keep capacity in mind of CBOs/CAAs as a potential barrier
- Coordinating EE Marketing with IL Solar for All:
 - It is still early in solar 4 all planning- it is important to understand how the program will be implemented. And then work with that. To engage resources for folks on the ground.

Small Group 6: Sonya Lewis- SML Communications

- Feedback on utility market presentations:
 - Hyperlocal targeting – there are different communities within Bronzeville. It is important to consider difference within a neighborhood.
- Best way to reach IQ Customers in the communities they represent:
 - App – called *NextDoor* where people are talking to their neighborhoods next door.
 - App- *Sidewalk* for businesses to tie in businesses
 - *Facebook Local* is also another online platform that can be utilized.
 - Be sure to still focus on traditional media- it is important not to deviate from these media.
 - There are hyperlocal newspapers within neighborhoods that can also be utilized for marketing and outreach to IQ customers.
- Feedback on Facilitation Team’s CBO Outreach Presentation.
 - It is important to target organizations that can make decisions.
 - Create a process- what is the process when the outreach occurs? Inform CBOs and community members prior to actual outreach.
 - It is vital to reach out to the right people
 - “Incentives for participation in IQ North Committee”- Incentives are not a one size fit all, incentives are different for CBOs.

Next Steps

1. **Next IQ North Committee Meeting:** The next in-person IQ North Committee meeting is anticipated in February 2019 (date/location TBD).
2. **2019 IQ North Working Groups:** The Working Groups for 2019 will be announced at the next in-person meeting. IQ North participants will be invited to self-select into their group of choice.
3. **ComEd Marketing and Outreach 2019 Strategies:** ComEd is interested in feedback on identifying partners and advocates in the 3 areas they will focus on for blitz campaigns in 2019. The 3 blitz campaigns planned:
 - a. **Southside Chicago** – Englewood, West Englewood, Chicago Lawn
 - b. **West Side Chicago** – Austin, East and West Garfield, Lawndale
 - c. **Rockford**