

IQ North EE Advisory Committee Meeting

Friday, February 8, 2019

10:00am – 2:00pm

Attendee List and Meeting Notes

Nicor Gas Facilities
1844 Ferry Road, Naperville, IL

Attendees (In-Person)

Theo Okiro, Facilitator
Annette Beitel, Facilitation Team
Celia Johnson, Facilitation Team
Donna Carpenter, COFI
Foluke Akanni, CUB
Aimee English, CUB
Jim Jerozal, Nicor Gas
Randy Opdyke, Nicor Gas
Patricia Islas, COFI
Marsha Belcher, Lake County
Briana Parker, Elevate Energy
Stefano Galiasso, UIC-ERC
Nick Dreher, MEEA
Samarth Medakkar, MEEA
Dan Moring, Slipstream
Ashley Palladino, Resource Innovations
Claire Sadler, ComEd
Kevin Dick, Delta Institute
Mike King, Nicor Gas
Jackie Nagel, Nicor Gas
Mark Szczygiel, Nicor Gas
Charles Pazilla, Nicor Gas
Bruce Liu, Nicor Gas
Anthony Tortomasi, CMC Energy Services
Fred Maher, CMC Energy Services
Jordan Berman Cutler, ComEd
Molly Lunn, ComEd
Laura Goldberg, NRDC
Yami Newell, Elevate Energy
John Pady, CEDA
Daniel Maksymiw, CEDA
Nick Horras, Resource Innovations
Dan Westin, Franklin Energy
Omy Garcia, Peoples Gas – North Shore Gas
Larry Dawson, IACA
Linda Choong, Nicor Gas
Harold Rice, CEDA
Cheryl Johnson, PCR
Lisa Miranda, Rebuilding Together

Attendees (By-Phone)

Luis Diaz-Perez, ComEd
James Carlton, People for Community Recovery
Anthony Santarelli, SEDAC U of I
Victoria Nielsen, Applied Energy
Karen Lusson, IL Attorney General's Office
Jacob Stoll, ComEd
Naomi Davis, Blacks in Green
Emily Klein, East Central Illinois Community Action Agency
Katherine Elmore, CIC
Marisa Joyce, Elevate Energy
Patricia Plympton, Navigant
Rachel Scheu, Elevate Energy
Noel Corral, ComEd
Elena Savona, Elevate Energy
Edith Makra, Metropolitan Mayors Caucus,
Gina Strafford-Ahmed, DuPage County
Erikka Byrge, Seventhwave
Mary Ellen Guest, Chicago Bungalow Association

ComEd 2018 Program Results

- Food bank program performed better than expected
- There are lessons learned from 2018 that will be incorporated in 2019
- Will need to spend extra in 2019, 2021 and 2022 due to slight underspend in 2018. On track to achieve the minimum spend over the EE Plan.
- Chicago Bungalow Association expanded into the south suburbs; they exceeded their goal and have been well received in the suburbs
- IHWAP program can now serve more customers, due to the extra funding from utilities. Up to 250% of poverty level.
- Challenges:
 - Adapting the new annual / calendar year cycle to the scale of programs \$\$\$. Due to the large budget the activity needs to be continuous.
 - Tenant education through multi-family program. Received feedback from tenants and landlords that this would be useful. ComEd is looking into tenant education.
 - Outreach to Public Housing Authorities. ComEd is focused this year on making sure all of the housing authorities know the program is available.
 - Reason for challenges:
 - Transfer of the program from DCEO to utilities
 - The fact that Ameren IL isn't offering the same type of targeted program in their service territory
 - Great interest and demand for the program from housing authorities. There is more staff time / dedicated outreach needed, which ComEd is planning for 2019.
 - IHWAP challenges
 - Ramp up of network
 - Lower than anticipated savings. There are utility-only projects that weren't anticipated when the EE Plan was filed.
 - But 2019 looks very promising

- Gas utilities are claiming more therms
- Community action agencies that now offer multifamily include Lake County and Kendall County CAAs. CEDA has been offering multifamily.
- Affordable Housing New Construction – outreach is a focus in 2019
- Lighting discounts – excited about new engagement by small retailers. Small retailers represent 45% of sales, which is not typical of this program. There was a slow start up this year due to new retailers that hadn't participated previously.
 - Priority for 2019 – ensuring geographic distribution for this program
- Food Pantry LED Distribution – challenge was that food pantries weren't as accepting about promoting other EE programs. There isn't a lot of space, they don't want to hold onto marketing materials. ComEd responded by incorporating this into the lighting packaging.
 - Kevin Dick: Do you track penetration rate of lighting for low income families?
 - We think better research is needed on this. There may not be as much penetration into low income families as other customers.
 - When ComEd does direct install and PHA programs, they do not replace CFLs.
- Energy Saving Kits – challenge is distribution in non-heating season

2019 ComEd Update

- A lot of offerings are continuing as in 2018
- Almost all CAAs will be participating in 2019
- Multifamily program now includes free smart t-stat
- Home Energy Upgrades program now includes free smart t-stat
 - Some customers don't want smart t-stats; a lot of this is comfort with technology
- Two new manufactured housing offerings as a result of 3rd party / open source RFP
- Karen Lusson: Why is confusion being caused with the Ameren IL program?
 - Ameren IL is not currently offering a targeted program to affordable housing customers.
- Karen Lusson: How are the CAAs balancing their participation in ComEd's interest in 80% AMI investment with their obligations to achieve IHWAP goals for housing at or below 200% federal poverty level?
 - Some CAAs have had the bandwidth to target those customers right away
 - Some others it is taking more time to get there. This is being handled on an agency by agency basis

2018 Nicor Gas IQ Results and 2019 Update

- Nicor Gas wants to serve more customers and spend more \$ in 2019 and coming years.
- Nicor Gas plans to work more closely with CBOs and have a more streamlined process of working with income qualified customers.
- Briana Parker: Who is Nicor Gas planning to work with?
 - We have identified a handful so far. Still working on identifying CBOs to work with.
 - Working on learning what CBOs do – who do they work with within the community? Do they have an intake center? How can they partner with the utility? Etc.
- How do we make the ideas raised in this group operational?
- Karen Lusson: Why was only \$1.8 million spent, if these are joint programs? Why is Nicor Gas concerned while ComEd is pleased with the results from 2018?
 - Most of the \$ were put towards IHWAP in 2018 and there was a slow ramp-up.

- We are changing the design of the program to include more direct work with CBOs.
- Kevin Dick: Are you serving the under 80% AMI threshold?
 - The same customers are being served as ComEd; the 80% threshold and also from 200 – 250% of the federal poverty level.
- Cheryl Johnson: Have you mapped out the areas as to where customers have been served? Reviewing geographic distribution would be useful.
 - Nicor Gas will follow-up at next meeting with geographic info, in what communities were customers served in 2018?
- John Pady: Is some of the reason for the lower participant by Nicor Gas due to the split of measures (gas vs. electric for example)?
 - Gas is somewhat capturing less than ComEd
 - Nicor Gas wants to serve more units.
- Nicor Gas shared a review of the new IQ channel.
 - Nicor is happy to share more about their new plans for serving IQ customers, if there is interest.
- Nicor Gas wants to see an additional emphasis on multi-family in 2019.
- Nicor Gas shared specific unit goals and dollar spend goals for 2019 and behind (2020-2021). Need to make up the deficit that was not achieved in 2018.
- Note – the updated commitment is about \$1,000,000 more than the minimum required
- Email Theo with any follow-up questions for Nicor Gas. You can also reach out directly to Mike King, Nicor Gas.

2019 Peoples Gas & North Shore Gas Update

- CUB: How many units were covered in IHWAP in 2018?
 - Omy will follow-up.
- Public Housing program has been more challenging in the Peoples Gas territory. There is red tape within Chicago Housing Authority. Working on figuring out how to better collaborate.
- Peoples Gas & North Shore Gas achieved their goal 2018 spend target.
 - Therm savings came in a bit under target.
- Currently finalizing cost allocations with program partners.
- Cheryl Johnson: Were you able to implement any projects with Chicago public housing?
 - Yes, some CHA living units, but not as many as we would have hoped to.
 - Cheryl is interested in more information. Omy will follow-up.

ComEd Call for Ideas & Other R&D Pilot Updates

- ComEd held a “Call for Ideas” solicitation in 2018.
- ComEd has almost 40 pilots running through Emerging Tech; this presentation includes a handful that ComEd thought Committee participants would be interested in.
- ComEd will be hosting a webinar next month that will include a summary of Call for Ideas.
 - Theo will share webinar info with the IQ North Committee.
- Emerging Tech program is focused on both EE technologies and on program delivery strategies.
- ComEd’s savings goals stack over time and continue to grow.
- Ductless Heat Pump Pilot
 - 80 heat pumps have been installed
 - Implementer is CMC Energy
 - Coordination with HVAC contractors + electricians to do site visits

- There is customer education follow-up after units are installed.
- Housing units are very small – avg. of 600 square feet.
- With the heat pump there is a thermostat- electric baseboards do not have thermostats.
- Are there other customer satisfaction metrics?
 - They are working on a customer satisfaction survey that will go out to participants.
 - This will be a quarterly customer survey.
- Are you measuring the comfort zone of participants?
 - Data will be analyzed for one year- we will see their past year history and what the usage is with the heat pump technology.
 - Heat pumps should be much more comfortable than electric base boards.
- Is there any plan to expand this technology?
 - We want to understand the customer interaction with this equipment, including customer satisfaction. Pilot results will help us understand if this is a cost-effective measure to offer in the future.
- What kind of data is being collected thru the thermostat? Is there any behavioral information being collected?
 - We are still in the beginning stages
 - The Ecobee thermostat will monitor set-points. We want to see how often customers are going above the setpoint, and when they go above it, looking at the outdoor temp.
 - When the temp is over 25 degrees outside, the baseboard will be “locked out” so the customer won’t be able to turn it on.
- There are also benefits to health and safety; greater comfort means less likelihood that ovens will get turned on.
- Estimated savings from traditional electric baseboard heat is 50%. Electric heat is very costly.
- There is a lot of turnover in these units due to high electric bills.
- We are keeping a log of lessons learned
- How are you sharing information about other EE programs?
 - The pilot buildings selected had already participated in a previous EE program with Franklin.
 - ComEd will plan to have multi-family EE team reach back out once the pilot is completed.
- Tenant education component has been one early learning. If this program were to expand, there would have to be a major aspect of the program on tenant education, both on maintaining and using the units and on other EE measures.
- Passive House Update
 - LUCHA is an affordable housing developer in Chicago.
 - This project is a very efficient new construction building – triple pane windows, continuous insulation, very thick walls, insulation in the roof line, etc.
 - The same building is built down the street that is built using standard “new construction”, to the Energy Star standard. This provides an interesting comparison and will allow the study of the ‘tenant experience.’
 - Residents moved in, in late 2018.
 - There will be resident surveys in 2019 and Slipstream will be monitoring energy performance.
 - John Pady, CEDA: What is the heating capacity of each unit?
 - Mark Milby will follow-up.
 - Will there be customer education on energy savings?

- Yes, that is part of this pilot.
 - There is turnover in rental units. There needs to be ongoing support and education. LUCHA plans to provide this.
- ComEd shared a brief overview of two health + EE initiatives that are from the Call for Ideas – Breathe Easy US HUD Study and GHFI / Elevate Energy pilot.
 - Mark Milby can provide information on where homes are located.
- ComEd also shared a brief overview of a research study for customers with very high energy usage and other examples of upcoming pilots.

IQ North Committee – Summary of 2018 and 2019 Objectives and Topics

- Laura Goldberg: Identifying gaps and barriers should be ongoing
- Michelle Pulce-Flynn: One way to draw additional organization is to change where the meeting is hosted, such as at the state association for CAAs.
- Cook County Workforce Partnership has 49 CBOs that convene on a monthly basis, in one spot. John Pady, CEDA, will follow-up. DuPage Work Net has a similar effort.
- Addressing hard to reach populations will be the main topic for the year.
- Community members are struggling with the payment plans and other concerns. This should be addressed.
 - Molly Lunn, ComEd: We have been talking internally about how to better connect this; when we talk about bill assistance, we also talk about EE. This is something that needs to be addressed.
 - Add this topic to the IQ North program feedback working group.
- Planned Working Groups for 2019:
 - IQ North Workforce Development/Workforce Diversity Working Group
 - IQ North Program Feedback Working Group
- The IQ North Facilitation Team is open to feedback on additional suggestions and topics for 2019. Please send within the next 10 days.
- Please email Theo if you are interested in participating in either (or both) of the Workforce Development/Workforce Diversity Working Group and Program Feedback Working Group by Feb. 28.
- CBO Representative for IQ North Leadership Team – send by Feb. 28.

Report-Out from Small Group Breakout – Feedback on Addressing Hard to Reach IQ Customers

Jackie Nagel, Nicor Gas

- Multi-family customers are a hard market to target for Nicor.
- It's not easy to get information about tenant's income.
- There are even fewer multi-family IQ properties in the Nicor Gas service territory.
- Nicor Gas is interested in more information about landlord-focused community groups.

Samarth Medakkar, MEEA

- Hard to reach =
 - Customers who qualify for programs but do not receive any assistance
 - Customers who do not qualify for some programs, such as those who fall outside of the 80-200% AML range.
 - Lower income customers with unpaid bills and high energy use
 - Lower income customers that do manage their energy bills but could still benefit from EE programs
- LIHEAP is a key segment for identifying eligible customers

- There are other utility EE IQ programs that are not as closely connected to LIHEAP; customers that are not actively seeking assistance
- How do we engage community groups that may not be driving financial assistance, but are further engaged with customers?

Cheryl Johnson, People for Community Recovery

- Trust issues between utility companies and their customers; how can these be addressed?
 - Utilities need to counteract the trust concerns
 - Customers are concerned their participation will lead to getting in trouble in other areas (example, undocumented immigrants)
- Idea – hire community ambassadors that can build trust with residents and share info about EE
- Consider using media, such as radio, for advertising or public service announcements to share broader awareness of EE programs
- Legislative issue – to get the conversation going between customers and utilities, we should consider a waiver for existing programs such as arrears. An extension for 6 months, etc.
- Consider an up-front benefit to participation in EE programs – for customers that have many challenges, telling them they will save on their bills in the future may be a hard sell. Examples - \$25 off your utility bill, gift card, etc.

Jordan Berman-Cutler, ComEd

- Technology – the inability to apply to EE programs through certain methods
 - Non-English speaking, seniors in particular may not be able to access certain programming
- Concerns with some of the low-income communities; fear that participating in a program will make the utility shut off their electricity
- Not being able to get to communities that are less dense
- Multi-family housing – investment landlords that buy housing and are not as engaged, therefore harder to engage in EE

Patricia Islas, Community Organizing on Family Issues

- Senior Citizens are a hard-to-reach population.
- Immigrant families – if there is someone undocumented in the household, that family may think it makes them ineligible
- Importance of meeting families where they are located
- Households in crisis – financial hardships, mental health issues. EE is the last thing on their mind.
- Need to build trust between utility companies and customers.

John Pady, CEDA

- The theme of this conversation is trust.
- It's important to engage community-based organizations and community ambassadors to be the ones interacting with customers.
- Senior citizens – even an intake center that is 1 mile away is still a challenge
- Families with children where going to a center to apply for LIHEAP is a challenge
- CEDA just purchased a mobile command center. Our goal is to identify by zip code areas that are underserved and use this command center.

- The political environment can change people’s perception and fears.
- For IHWAP, the “wet signature” requirement is a barrier, where customers are required to go to an intake center.
 - Eligibility/income verification is also a barrier and requires in-person intake.
 - For any partnerships that include federal or state \$, utilities have challenges changing the verification requirements.
 - Factoring in income for more than one person, for income eligibility.

Follow-up Items & Key Next Steps:

1. **Building Trust in IQ Communities:** A trend from this meeting was the discussion on the need to build trust between utilities and IQ Customers. This discussion will inform the next in-person meeting and the continued discussion on “addressing hard-to-reach” IQ customers.
2. **Mark Milby of ComEd** will share with the facilitation team the webinar information and link to the introduction of ComEd’s “Call for Ideas” winners. Mark will also provide information on the following:
 - a. Location of homes for the Breathe Easy US HUD Study and GHHI / Elevate Energy pilot.
 - b. The heating capacity for each unit in the Passive House Pilot.
3. **Geographic Gaps in Implementation – Nicor Gas:** Nicor Gas will provide information on the geographic distribution of the locations of IQ customers that were served by their programs in 2018.
 - a. Nicor Gas will also share their updated plans for better serving IQ customers going forward.
 - b. The utilities will also share the geographic distribution/imaging of which CBOs they are collaborating with vs. where IQ customers are currently getting served and not getting served – to understand where gaps are.
4. **2019 IQ North Activities:** The facilitation team announced the following action-items:
 - a. There will be a scheduled call to introduce each working group, discuss working group structures and participants. The date will be announced for each call soon.
 - b. Interested participants in the working groups should email Theo.Okiro@futee.biz of their working group selection by February 28th, 2019.
 - c. Interested applicants in the CBO Representative position should email Theo.Okiro@futee.biz by February 28th, 2019 with their application materials.
5. **Peoples Gas – North Shore Gas:** Omy Garcia will share the following:
 - a. How many units were covered in IHWAP in 2018 by Peoples Gas – North Shore Gas.
 - b. The list of Public Housing Authorities that they collaborated with in 2018.
 - c. The list of projects completed in Chicago Housing Authority units.