



**Income Qualified South Energy Efficiency Advisory Committee
2018 Annual Report
January 8, 2019**

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Income Qualified South Energy Efficiency Advisory Committee: 2018 Annual Report Draft (Updated 1/16/19)

Scope of the Report:

This report is the Annual Report of the Income Qualified South (IQ South) Energy Efficiency Advisory Committee, which summarizes the activity of the Committee between January 2018 and December 2018.

The Income Qualified (IQ) Energy Efficiency Advisory Committee was established following passage of the Future Energy Jobs Act (FEJA) in 2016. The initial purpose of the Committee was identified in FEJA: To “assist in the design and evaluation of low-income energy efficiency programs”¹ There are two separate committees – the IQ North Advisory Committee covers ComEd, Nicor Gas, Peoples Gas & North Shore Gas utility service territories in northern Illinois. The IQ South Advisory Committee covers Ameren Illinois’ utility service territory.

The 2018 activities of the IQ South Advisory Committee will be highlighted in this report.

I. Executive Summary

In 2018, the IQ South Committee successfully convened stakeholders to discuss and receive input on Ameren Illinois’ Income Qualified Energy Efficiency (EE) programs, community needs, Income Qualified EE program promotion and education, job creation and energy efficiency education as related to IQ customers in the Ameren Illinois territory. The Facilitation Team compiled the committee member feedback and circulated the feedback to IQ South participants following each meeting.

Although 2018 was a formative year for the committee with focus on establishing Committee policies, procedures and garner participation, the Committee did provide substantive input on multiple topics, including:

- a. **Identifying segments of IQ customers i.e. mobile home residents that were particularly underserved by energy efficiency programs.** Mobile Home Energy Efficiency Programs for IQ customers was then added to the Ameren Illinois Income Qualified portfolio.
- b. **Identifying best strategies for marketing IQ programs** to IQ communities.
- c. **The Committee addressed educational gaps in energy efficiency for Community Based Organizations (CBOs).** The CBOs also provided feedback how to educate the community on the importance of energy efficiency.
- d. **The Committee built strong relationships with CBOs.** This led to information sharing amongst themselves and the identification of CBO programs that can be discussed at 2019 IQ South meetings.

¹ 220 ILCS 5/8-103(B)(c)

II. Background of IQ South Committee

The Income Qualified Advisory Committee was established following passage of the Future Energy Jobs Act (“FEJA” or “Act”) in 2016, as applicable to individual utilities.

The statutory requirements for low income energy efficiency programs are outlined in Section 8-103(B) of the Public Utilities Act for electric utilities and Section 8-104(e-5) for gas utilities. Electric utilities are directed by statute to convene a “low-income energy efficiency advisory committee”:

The electric utilities shall also convene a low-income energy efficiency advisory committee to assist in the design and evaluation of the low-income energy efficiency programs. The committee shall be comprised of the electric utilities subject to the requirements of this Section, the gas utilities subject to the requirements of Section 8-104 of this Act, the utilities' low-income energy efficiency implementation contractors, and representatives of community-based organizations.²

III. IQ North Committee Formation Process

To fulfill the statutory mandate for the IQ North Committee, the facilitation team worked with the sponsoring utilities to develop the following key process elements for the Committee:

- a. Leadership Team
- b. Committee Process and Structure
 - i. “Large Group” Committee Meetings
 - ii. Detailed Tracking Document
 - iii. IQ North Committee Website
- c. Introductory Meetings with Community Based Organizations

A. Leadership Team

A Leadership Team was appointed to oversee the functions of the Advisory Committee and ensure its yearly success. The Leadership Team comprises of the IQ South representative utility – Ameren Illinois. In 2018, the Leadership Team also included Community Leader³ Dalitso Sulyamoyo, Executive Director of *Champaign County Regional Planning Commission (CPRC)*⁴ and the Facilitation Team.

The IQ South Advisory Committee meetings are facilitated by the Facilitation Team (Future Energy Enterprises LLC,). The facilitation team is responsible for developing agendas with input from the Leadership Team, organizing and presiding over meetings, maintaining and circulating meeting notes, updating the tracking document with feedback from meetings, identifying open

² 220 ILCS 5/8-103(B)(c).

³ “Community Leaders” means non-financially interested persons or organizations identified by the Convening Utility who will serve on the Leadership Team. Financially interested persons or organizations are not eligible to serve as Community Leader(s). “Financially Interested” means an entity that receives \$25,000 or more per year from contractors to implement Income Qualified energy efficiency programs.

⁴ The Champaign County Regional Planning Commission is an intergovernmental membership organization that provides a variety of programming in the areas of regional, environmental and transportation planning; economic, community, and workforce development; social services; early childhood education; and technical assistance in East Central Illinois.

issues and action items and conducting research on best practices and other select issues raised by the Committee.

B. Committee Process and Structure

The Committee process and structure was discussed during pre-formation meetings held from April 2017 to June 2017 and finalized in 2018. The Facilitation Team utilized the process discussed in these pre-formation meetings at the 2018 Committee meetings. The IQ South Committee met twice in 2018, with two large in-person meetings and two teleconference meetings. The Facilitation Team circulated an introductory survey after the first meeting in April. The purpose of this survey was to solicit feedback on the Committee process and structure. Prior to the final meeting of the year, the Facilitation Team also circulated an end-of-year survey to solicit feedback from the first year of meetings. The Facilitation Team meticulously documented feedback and comments raised at the meetings in the detailed tracking document which was then circulated after each meeting and added to the Committee website. This Committee process and structure are detailed below:

i. “Large Group” Committee Meetings

The Income Qualified (IQ) South Advisory Committee met two times in-person and two times by teleconference, on the following dates respectively: April 17, 2018, June 12, 2018, October 1, 2018 and December 17, 2018. The first two meetings were held in-person and the last two were held via teleconference. The meeting notes and topics are detailed in the Appendix.

i. Detailed Tracking Document

A significant and beneficial resource created for the IQ South Committee was the Tracking Document. The purpose of the tracking document is to memorialize and ensure follow-up of Committee member feedback. The Facilitation Team updated the tracking document with IQ North Committee comments, follow-up items, action items and responses from meeting participants following each meeting. This made feedback of each topic or meeting objective easy to track and accessible for meeting attendees and Ameren Illinois. The Tracking Document also ensured that all comments and inputs shared were compiled in one master document. The document was then circulated to IQ North Committee participants along with meeting notes and other documents approximately two weeks after each meeting.

i. IQ South Website

Another key resource developed and managed on behalf of the IQ South Committee in 2018 was the Income Qualified EE Advisory Committees [Website](#). Minutes of each meeting, meeting materials, IQ North tracking document and other resources are available on the IQ South section of the IQ Advisory Committee website. The availability and accessibility of IQ North Committee meeting notes and materials ensures that the Committee Process and discussions are public and transparent for meeting attendees and the general public at large.

C. Introductory Meetings with Community Based Organizations (CBOs)

Introductory meetings and calls with CBOs in the IQ South territory were conducted in 2018. The Facilitation Team conducted these meetings. The purpose of these meetings was to establish and maintain CBO ongoing participation in IQ South Committee meetings. Another crucial purpose of these meetings was for the Facilitation Team to be familiarized with the CBO's in-house programs and/or unique community needs.

This relationship-building is vital to promote the possibility of the CBO's greater involvement in the Committee process. Such involvement in the future will consist of presentations to the Committee and perhaps hosting of in-person Committee meetings.

IV. Participation

IQ South Committee 2018 meetings included those specifically identified in the Future Energy Jobs Act:⁵ Representatives of Ameren Illinois, representatives of designated Community-Based Organizations (CBOs); and representatives of Income Qualified energy efficiency program implementation contractors.

“Community-Based Organizations” are defined as private or public not-for-profit organizations, including volunteer organizations, located in an Illinois community, that provides services to citizens within that community and the surrounding area.

V. Key Topics Addressed in 2018

Each 2018 topic was selected because these topics were the topics of greatest interest identified by Ameren Illinois and CBOs based on comments and feedback during IQ South Formation meetings. In 2018, the topics discussed at the IQ South Committee Meetings led to robust feedback and insights from CBOs and Implementers for Ameren Illinois to continue improving program design and implementation. The key topics addressed are the following:

- a. **Input on Serving Communities.** The purpose of this topic was to receive feedback on how to better serve disadvantaged communities in Ameren Illinois territory through Income Qualified (IQ) energy efficiency programs. Input for this topic was requested from the IQ South Committee at the April 17th Meeting using the following discussion questions:
 - i. What are the energy needs of your community?
 - ii. Do you see any gaps in energy efficiency programs?
 - iii. What strategies should this group use to keep focused on serving low income customers?
 - iv. What strategies should this group use to make sure that we are able to receive broad perspectives?

Through feedback given by CBOs and Implementers from these questions, the IQ South Committee determined that the energy needs of IQ customers in the IQ South territory

⁵ See 220 ILCS 5/8-103(B)(c).

encompasses the lack of familiarity and awareness of the fundamentals of energy efficiency.

Based on facilitated small table and large group discussions, the IQ South Committee successfully pinpointed the major gaps and barriers impeding IQ customers in the territory from accessing energy efficiency programs. **The Committee identified the following gaps and barriers:**

- The cost of training for workforce programs and other opportunities is a barrier.
- There is a barrier to using thermostats because of the lack of broadband access in certain rural areas.

The Committee resultingly recommended steps to better serve disadvantaged communities with energy efficiency programs in the future.

- Provide financial resources and other much needed resources to successfully implement and complete workforce development programs.
- Ensure that the jobs being developed are in the communities that are being served by programs.
- Ensure access to WIFI since prior to installing smart thermostats.

An actionable takeaway from this meeting was a concern from several CBOs that current Ameren IQ initiatives and programs did not include eligibility for mobile home residents. Ameren agreed to assess additional measures for mobile home residents and officially included these measures later in the year. **The subsequent inclusion of mobile home offerings in the Ameren Illinois IQ portfolio was a concrete success developed as a result of the initial IQ South meeting.**

Feedback also indicated that IQ customers could benefit from education about energy efficiency and more education about Ameren Illinois' energy efficiency programs. **The IQ South Committee recommended the following:**

- Energy efficiency education is a viable strategy for IQ customers to bridge existing gaps and easily access Ameren's programs.
- It was further recommended that Ameren provide additional energy efficiency education for IQ customers, which Ameren agreed to consider.

This feedback along with actionable recommendations for addressing the gaps will be examined in depth in 2019 at the in-person Large Group Committee Meetings.

- b. **Input on Program Promotion and Education.** The purpose of this topic was to discuss the best strategies to educate IQ Customers on EE programs and best strategies for marketing IQ programs. Input on this topic was requested from the IQ South Committee at the June 12th meeting using the following questions:
- i. What barriers exist to reaching customers?
 - ii. What is the best way to reach IQ customers in the communities you represent?

- iii. Do you have feedback about the Ameren Illinois program promotion and outreach plans for IQ programs?

The Committee identified the following existing barriers to reaching customers:

- IQ customers are unfamiliar with the “energy efficiency” terminology and may not understand energy efficiency benefits.
- Language as a barrier to accessing reaching IQ customers. Committee members noted that in several cities in the IQ South territory, there were large pockets of residents with English as their second language. Some of the first languages spoken include Arabic, Spanish, Haitian Creole, Mandarin and Congolese.

IQ South Committee CBOs that are especially embedded in their communities shared salient feedback on the best strategies for marketing IQ programs to their individual communities. **Some program promotion and education strategies shared for Ameren Illinois’ benefit include:**

- Develop resource materials including a general explanation of energy efficiency that provides a basic understanding on how energy efficiency can benefit individuals and communities.
- Educate customers on the benefits of energy efficiency for heating and cooling season.
- Ensure that programs are customer-centric; the customer’s needs should be a priority.
- Leveraging other marketing efforts with local CBOs.
- Participating in community events such as faith-based events.
- Door-to-door marketing.
- Co-branding efforts and community-based outreach in collaboration with Community Action Agencies (CAAs) and other CBOs.
- To bridge the language gap, it was recommended that Ameren Illinois sponsor a ‘speakers bureau’ to reach communities that speak these various languages.

As a result of these program promotion ideas, Ameren Illinois agreed to implement some of the feasible strategies expressed – particularly the co-branding opportunities with CAAs and CBOs; and a commitment to increased presence at community events. Ameren Illinois demonstrated how it responded to CBO feedback in its presentation at the December 17th meeting. **Ameren Illinois demonstrated its responsiveness to Committee feedback by testing out different program promotion and education ideas for IQ customers.**

The strategies suggested for program promotion by the Committee will be further discussed and explored in 2019 at the in-person Large Group Committee Meetings.

- c. **Input on Marketing and Outreach.** The purpose of this topic was to receive input on the most effective channels to best reach IQ customers. Input on this topic was also

requested from the IQ South Committee at the June 12th meeting using the following questions:

- i. What are outreach activities that should be considered for mobile homes?
- ii. What are some different ways to reach income qualified customers outside of traditional marketing?
- iii. Ideas for marketing campaign design?

The IQ South Committee successfully provided insight to Ameren Illinois on the important services that should be provided to mobile home residents. Regarding outreach activities geared towards mobile homes, it was succinctly stated by Committee participants that, “*the approach to reaching residents in mobile homes is not different from other programs.*”

Other insight shared on effective outreach activities to mobile home residents include:

- A “traveling mobile home demo” – to take around to different mobile home parks and demonstrate the importance of energy efficiency.
- Establishing partnerships with mobile home landlords and *Habitat for Humanity*.
- Bill inserts to market mobile home IQ programs.
- Complete a case study on mobile homes to identify actual savings.

Regarding marketing materials design ideas, overall feedback suggested the following:

- Ameren Illinois should link energy efficiency education with marketing and outreach. For instance, it was recommended that Ameren Illinois develop resource materials that includes a general explanation of energy efficiency and how it can benefit communities.

Ameren Illinois was receptive to the feedback shared and will be incorporating the feasible feedback into their marketing and outreach plans in the future. In 2019, the marketing and outreach topic will be folded into the program promotion and education discussions at the in-person Large Group Committee Meetings.

- d. Job Creation and Workforce Diversity.** The purpose of this topic was to receive input on efforts to provide jobs, job diversity and other economic benefits in disadvantaged communities. This topic was a preliminary discussion 2018 and lightly discussed at the June 12th meeting.

Following small-group breakout sessions, Committee participants recommended the following:

- Ameren Illinois should have a larger presence at job fairs.
- Ameren Illinois should also consider participating in non-traditional job fairs (such as a skills fair), or a fair focused on businesses that includes an overview of what is offered from EE.

A major takeaway from this topic was the information that the CBO, *Illinois Valley Economic Development Corporation* has an existing workforce development model that is a successful pipeline for bringing people into the workforce through Community Action Agencies. An overview of this program will be presented to the Committee in 2019.

Overall, the direction of the workforce development topic in future meetings was touched upon. It was recommended that the Committee discuss available trainings and workforce gaps at a future meeting. The topic will be discussed in depth in 2019.

- e. **“Energy Efficiency 101” Webinar.** The purpose of this webinar presentation was to introduce the fundamentals of energy efficiency, its benefits and importance to the IQ South Committee. The need for comprehensive information and education on energy efficiency was mentioned at the first IQ South Committee meeting in April 2018.

The webinar was presented by the *Midwest Energy Efficiency Alliance (MEEA)* at the October 1st meeting. The presentation successfully provided an educational platform for IQ South Committee participants that needed additional information and experience in energy efficiency.

- f. **Ameren Illinois Income Qualified EE Program Initiatives Updates.** The purpose of this topic was to provide the Committee updates on Income Qualified (IQ) energy efficiency programs from Ameren Illinois. Throughout the year, Ameren Illinois routinely provided updates such as marketing and outreach strategies, quarterly updates and proposed portfolio plans on the state of the IQ Programs. These frequent updates will continue throughout 2019 in Large-Group Committee meetings.

VI. Committee Impacts and Successes

Despite being a formative year, in 2018, the IQ South Committee successfully provided vital feedback and information that was adopted by Ameren Illinois into their Income Qualified Energy Efficiency Program Portfolio in 2018 and onwards. For the key topics addressed in 2018, the Committee successfully achieved the following successes:

- a. **Ameren Illinois as an Effective Convener:** The Committees’ success in 2018 is directly correlated with Ameren Illinois’ participation and responsiveness. Ameren Illinois was open to addressing concerns and incorporating feedback and insight gained from each meeting. Ameren Illinois also regularly provided updates on its Income Qualified programs – this led to a better understanding and familiarity of its programs by CBOs and implementers.
- b. **Inclusion of Mobile Homes in Ameren Illinois’ Income Qualified EE Portfolio:** The Committee shared feedback that mobile home residents are particularly underserved and underrepresented in IQ energy efficiency programs. This segment of the population that

was initially overlooked and underreached by IQ programs are now being served as a result of input shared by IQ South Committee participants.

- c. **Key Topics in 2019:** The feedback ideas that were shared on program promotion and marketing; and job creation and workforce diversity will be used to drive future discussions in 2019 Large-Group Committee meetings.
- d. **ESL Speakers:** The IQ South Committee meetings was a forum for CBOs and implementers to successfully advocate on behalf of and provide insight on severely underrepresented segments of the IQ customer base such as ESL IQ customers.
- e. **CBO Engagement and Introductory Meetings:** The high level of engagement at the Large-Group Committee meetings and subsequent introductory meetings with CBOs provided an opportunity for the Committee to learn about successful programs being implemented in IQ South communities.
- f. **Energy Efficiency Education:** For those CBOs previously unfamiliar with the fundamentals of energy efficiency and its benefits, an “Energy Efficiency 101” webinar was an educational resource provided by MEEA to introduce these CBOs to energy efficiency.
- g. **IQ South Community:** In 2018, the IQ South Committee provided an opportunity for CBOs to coordinate on shared resources and information sharing.
- h. **Barriers faced by IQ customers:** The Committee successfully identified the barriers and gaps hindering IQ customers from accessing energy efficiency programs. These barriers will be taken under consideration by Ameren Illinois when trying to reach IQ customers.
- i. **Committee Process and Structure:** The Committee established an effective committee process and structure. This process and structure made feedback easily accessible and transparent for the Committee and public in 2018. The diverse participation at each Committee meeting also ensured that diverse perspectives led to robust insights shared on each topic.

Overall, the IQ South Committee successfully fulfilled the FEJA statutory mandate of being a forum where CBOs, Implementers and Utilities convene and begin to evaluate, optimize and refine income qualified energy efficiency programs for the benefit of IQ customers.

VII. Conclusion

As previously noted, 2018 was a formation year for the IQ South Committee. In subsequent years, it is the intention of the IQ South Committee to become more substantive in its output and activities. This will be accomplished by focusing in on the following:

- a. Working to identify and engage additional CBOs to participate in the IQ South Committees.
- b. Developing actionable deliverables in collaboration with IQ South Committee participants.
- c. Emphasizing a greater involvement of CBOs in the Committee Process by hosting meetings in their spaces, presenting at meetings and greater overall coordination with the Committee.

- d. Translating 2018 feedback into concrete and actionable strategy changes for Ameren Illinois.
- e. Convening CBOs at outreach sessions for smaller “Lunch + Learn Meetings.” The purpose of these sessions will be to continue to engage and solicit feedback from CBOs in their communities.

Appendix A – Summary of Meetings

In 2018, there were two in-person IQ South meetings held at the *iHotel Conference Center* in Champaign IL and two meetings held by teleconference. These meetings are described below:

1. IQ South Meeting #1

The first IQ South meeting was held on April 17, 2018. The purpose of the meeting was following: 1) To formally introduce the IQ South Committee, the Facilitation Team, the Leadership Team and other Committee participants 2) For Ameren Illinois to give an overview presentation on their Income Qualified EE programs 3) For the facilitation team to introduce the Committee process and structure; and the 2018 IQ South Committee Plan. 4) The Committee participants then deliberated in “small group breakout sessions” energy efficiency needs and job opportunities in their community.

2. IQ South Meeting #2

The second IQ South meeting was held on June 12, 2018. The purpose of the meeting was the following: 1) To discuss how meeting feedback and questions will be tracked by the Facilitators in the tracking document. 2) For Ameren Illinois to present the proposed IQ South Committee vision and goals. 3) Ameren Illinois also presented an overview of their program promotion and education plans for their Income Qualified EE programs. 4) The Facilitation team invited participants in attendance to deliberate in “small group breakout sessions” about the presentations and share their discussions with the Committee at large.

3. IQ South Meeting #3

The third IQ South meeting was held on October 1, 2018 via teleconference. The purpose of the meeting was threefold: 1) MEEA presented an “Energy Efficiency 101.” 2) Ameren Illinois presented an overview of their Income Qualified EE programs and how the programs benefit IQ customers in their service territory. 3) The Facilitation Team presented an overview of the IQ South Advisory Committee and its purpose.

4. IQ South Meeting #4

The fourth IQ South meeting was held via teleconference on December 17, 2018. The purpose of the meeting was to wrap-up the first year of the IQ South Committee meetings and to announce 2019 activities. The agenda featured the following: 1) Ameren Illinois presented a report out on their 2018 Income Qualified results; Ameren Illinois also led a brief discussion on their initial thoughts and steps on low-income multi-family eligibility criteria. 2) Laura Goldberg of NRDC then led a brainstorming discussion on how to leverage other funding sources for energy efficiency programs. 3) The Facilitation Team presented a summary of results from the 2018 survey that evaluated IQ South participation, an overview of the 2019 IQ South topics, reviewed key 2018 IQ South activities and requested questions or feedback from the Committee.

Appendix B – List of Organizations that Participated in IQ North Committee Meetings in 2018

IQ South Facilitation Team

Ameren Illinois

Nicor Gas

Champaign County Regional Planning Commission

Indoor Climate Research & Training, University of Illinois

Tri-County Opportunities Council

Midwest Energy Efficiency Alliance (MEEA)

Resource Innovations

IL Attorney General's Office

Resource Innovations

Leidos, Inc.

Western Egyptian Economic Opportunity Council

BCMw Community Services

Madison County Community Development

Western Illinois Regional Council

East Central Illinois Community Action Agency

WM Energy

Embarras River Basin Agency

Citizens Utility Board (CUB)

Illinois Valley Economic Development

SEEL, Inc.

Faith in Place

Decatur Macon County Opportunities Corporation (DMCOC)

Smart Energy Design Assistance Center (SEDAC)

Illinois Association of Community Action Agencies (IACAA)

Community Organizing and Family Issues (COFI)

Peoria Citizens Committee for Economic Opportunity (PCCEO)

Appendix B contd. – List of Organizations that Participated in IQ North Committee Meetings in 2018

MCS Community Services

Opinion Dynamics

Two Rivers Regional Council of Public Officials

National Resources Defense Council (NRDC)

Energy Futures Group, on behalf of NRDC

Land of Lincoln Legal Assistance Foundation

Wabash Area Development

Community Action Partnership of Central Illinois (CAPCIL)

East Central Illinois Community Action Agency

Illinois Housing Development Authority

Environmental Defense Fund (EDF)

Energy Assistance Foundation

Decatur Macon County Opportunities Corp.

Walker Miller

Project Now

Illinois Department of Commerce and Economic Opportunity

Western Egyptian Community Action Agency

WADI Inc

Elevate Energy

CEFS Economic Opportunity Corporation

Appendix D – Copy of Tracking Document

Appendix E – Facilitation Team Presentation (including End of Year Survey Results)