

Income Qualified EE Advisory Committee North: Program Feedback Working Group Meeting #1

Tuesday, April 2nd, 2019
10:00am – 12:00pm

Attendee List and Meeting Notes Webinar Conference Call

Attendees (By-Phone)

Annette Beitel, Facilitation Team
Celia Johnson, Facilitation Team
Foluke Akanni, Citizens Utility Board
Aimee English, Citizens utility Board
Kevin Dick, Delta Institute
Omy Garcia, Peoples Gas-North Shore Gas
Mary Ellen Guest, Chicago Bungalow Association
Nick Horras, Resource Innovations
Cheryl Johnson, People for Community Recovery
Mike King, Nicor Gas
Karin Konrath, ComEd
Molly Lunn, ComEd
Sophia Markowska, MEEA
Briana Parker, Elevate Energy
Jenny Riley, Elevate Energy
Yami Newell, Elevate Energy
Dan Westin, Franklin Energy
Christopher Vaughn, Nicor Gas

Introduction (Celia Johnson, Facilitator)

Survey Results (Celia Johnson, Facilitator)

- A survey was sent out with questions about program feedback group. The purpose was to get feedback on working group topics and structure. The slides presented today are to cover results of survey and asking if any additional comments and questions.
- The results of survey will be incorporated into a working group plan.
- We received 11 responses to survey. There was a broad response of participants.

Structure of Working Group:

- Survey Question: How would you like the group to meet? In person or by teleconference?
 - Response: Majority was to meet via teleconference. We will certainly consider meeting in person later if helpful and when it is a longer meeting. The teleconference meetings will be shorter - 2 hours MAX.

IQ Programs

- **Survey Question:** Which IQ programs would you like to discuss?
 - **Response:** Top three here, home Energy upgrades, MF and public housing. Structure, we were thinking about having N. IL utilities discuss each of programs and issues that need more feedback.
- **Question from Brianna, Elevate Energy:** Will we specifically talk about bundling of services?
 - **Response:** Celia and Annette Beitel, Co-Facilitator: Yes, bundling great idea. **The facilitation team will welcome a presentation by Elevate and others on how to bundle.**
- **Comment from Yami, Elevate Energy:** Can we invite non-utility related programs such as the bungalow association to present on their program?
 - **Follow-up:** The facilitators will reach out to some of these programs.
 - **Next Steps:** At a future meeting, Utilities will present a program (the top programs selected via the survey) and the working group will discuss areas for improvement.

Working Group Topics

- **Survey Question:** What topics would you like to discuss?
 - Top topics is “incorporating EE and bill assistance.”

Customer Experience Map (Potential Working Group Deliverable)

- **ComEd:** ComEd has created customer experience maps in the past. It can take a couple of different formats.
- **Comment from Kevin Dick, Delta Institute:** Would love to see the templates. Customer Experience maps are helpful in walking through the experience – in this case for IQ customers. This can help understand any gaps in services. Lots of templates for how to do it. The deliverable is an actual map. Done in digital experience. For example, Walgreen did one for health care app.
- **Follow-up:** Kevin Dick and ComEd will share sample templates of customer experience maps.
- **Comment from Christopher Vaughn, Nicor Gas:** Nicor Gas has created one within the past month, though it is unclear how granular it is.
- **Question from Cheryl Johnson, PCR:** Will the customer experience map include the inclusions and definition of Environmental Justice communities?
- **Follow-up:** Theo to follow-up with Cheryl on how to view these discussion points through of Environmental Justice. We need to define Environmental Justice first.

Other Topics

- **Survey Question:** What are other topics related to feedback that you would like related to this group?
 - **Responses:** How are other programs and services braiding offerings. How do we find funding sources for Green and Healthy Homes?

Program Feedback Discussion Questions (Celia Johnson, Facilitator)

1. **Topic:** *Integrating Income Qualified EE Programs with Other Customer Assistance Programs.*

Question from Yami of Elevate Energy: The low-income population are often targeted by utility-related scams. How do we prevent scams in low-income communities?

- **Follow-up:** The facilitators will check with IPA, Elevate and AG's office on what they are doing.
- **Next Steps:** Additionally, the topic on 'building trust' will also be discussed at the in-person large Committee Meeting in July.

2. **Topic:** *Energy Efficiency Education and Providing Information to Customers*

Comment from Nick Horras, Resource Innovations: Resource Innovations (RI) has been doing outreach via a survey on capacity to do programs, particularly agencies. RI can ask agencies how they would like to be supported.

- **Follow-up:** Nick can add question on how CAAs would like to support to do outreach on weatherization and solar.
- **Next Steps:** Nick will share the outcomes of the survey at a later meeting.

Comment from Jenny Riley, Elevate Energy: Elevate is very interested in coordination with utilities and the committee on their outreach efforts. Elevate just issued an RFP to communities across the state on grassroots education for energy efficiency. Being able to educate organizations to educate EE. They would be open to exploring with the working group.

Comment from Yami, Elevate Energy: Elevate cross promotes programs via our Field Organizers all the time!

- **Follow-up:** Elevate's RFP efforts will be shared with the larger group Committee meeting.

3. **Topic:** *Addressing In-Home Repairs*

Comment from Nick Horras, Resource Innovations: Agencies are wanting to get resources on how to fund home repair. But they do not always know who provides those services.

- **Follow-up:** The facilitators will reach out to Rebuilding Together to better understand their referral network with CEDA.
- **Next Steps:** There will be a presentation on funding in IL for home repairs or existing referral networks linking IQ program administrators with organizations providing in-home repairs at a future meeting.

4. **Topic:** *Addressing Other IQ Customer Barriers to Participation*

- a. **Subtopic:** "Wet Signatures"

Comment from Kevin Dick, Delta Institute: We need to understand where this is an issue and if everyone uses LIHEAP as eligibility for other programs.

Comment from Molly Lunn, ComEd: The need for 'wet signatures' only applies to the LIHEAP portion of the program. It is a fairly small part of work ComEd is doing. Maybe the working group can do mapping initiative first. "wet signature" is an issue, but not the biggest issue.

Comment from Kevin Dick, Delta Institute: Agree that we should figure out experience first, then address "wet signature" issue.

Comment from Yami, Elevate Energy: The City of Chicago has funds in partnership with Elevate to provide exterior repairs for low income seniors formerly the SARS program

- **Next Steps:** The sub-topic of “wet signatures” will be re-examined after larger issues are addressed by the working group.

b. **Subtopic:** Predatory Programs

Question from Yami, Elevate Energy: The low-income population is often targeted for utility related scams. Are there any efforts by the utility to educate consumers on avoiding utility scams?

- **Follow-up:** The facilitators will follow-up with the utilities to address this question.

c. **Subtopic:** Immigrants/Refugee Participation

Comment from Molly Lunn, ComEd: ComEd can send list of agencies who deal with immigrants/refugees. Social Security Number is typically needed to open up account, however, there are ways around this.

Comment from Foluke Akanni, Citizens Utility Board: Having materials in various languages can help address this. There is *World Relief Chicago for Refugee Resettlement* that we can partner with.

Comment from Mary Ellen Guest, Chicago Bungalow Association (CBA): CBA has learned that working with Latinx churches helps to overcome this barrier.

- **Follow-up:** The facilitation team will reach out to these organizations to assess areas of partnerships to address this issue.

Comment from Omi Garcia, PG-NG: Several organizations PG-NG work with closely provide information in different language. We want to make sure the immigrants and refugees are getting information from trustworthy source. All the utilities provide services to immigrants/refugees and the key is to make sure they are getting information from a trustworthy source.

Comment from Aimee English, Citizens Utility Board: Part 280 does not require to provide Social Security number to open utility account. No one is obligated to provide this.

- **Next Steps:** Determine how the working group can work to provide this information to immigrants/refugee population.

Question from Yami, Elevate Energy: May the utilities please verify that they are not asking customers for social security information to open utility accounts?

- **Follow-up:** The facilitation team will verify this and share with the working group.

d. **Subtopic:** User Experience/Transactional Cost

- There is confusion on the wording in this section that states: “...IQ Customers is currently weighted towards program implementer needs...”
- **Comment from Kevin Dick:** This subtopic was suggested by him. He suggests wording the section to state that, “there is a need for better hand-off between programs...”
- **Next Steps:** The facilitation team will edit the discussion questions document and resend.

Question from Yami, Elevate Energy: What if there was an app or online experience that people could use to identify EE programs that were appropriate for them? could be used by customers and community orgs?

Comment from Molly Lunn, ComEd: ComEd has been thinking about this and would like to present.

Comment from Yami, Elevate Energy: Also many IQ communities utilize cell phones to access the internet, understanding how current low income customers are utilizing information via their online accounts it can help identify a gap to be filled on how to help this group connect and leverage the benefits of accessing information online and using smart technology? i.e. smart thermostats

Comment from Kevin Dick, Delta Institute: We should get user research first to address this.

- **Follow-up:** To understand gaps in IQ Customer user experience, the facilitators will follow-up with the utilities to understand how current low-income customers are utilizing information via their online accounts.

5. **Topic:** *Best Practices and Bridging Communication Gaps*
No comments.
6. **Topic:** *Other Program Feedback*
No comments.

Follow-up and Next Steps:

1. **Working Group Plan:** A working group plan will be developed with the structure and process determined from the survey, working group meeting dates, additional feedback given at the first meeting and working group discussion questions.
2. **Discussion Questions:** As suggested, the discussion questions have been edited to reflect the clarifications needed on certain sections. The edited version will be resent.
3. **Follow-up Discussion on IQ Programs:**
 - a. The facilitators will invite non-utility related programs such as the *Chicago Bungalow Association* and *Call for Ideas* recipients to present on their programs.
 - b. The facilitators will coordinate with Elevate Energy to present about bundling and coordination of services, this may be presented at a future meeting (clarify with Elevate which services they believe can be bundled).
 - c. The facilitators will gather utility responses on how other programs and services are braiding offerings
 - d. At a future meeting, Utilities will present programs (the top programs selected via the survey) and the working group will discuss areas for improvement.
4. **Follow-up for each Program Feedback Topic:**
 - a. Integrating Income Qualified EE Programs with Other Customer Assistance Programs
 - i. **Follow-up:** The facilitators will coordinate with Elevate, IPA and the AG office to understand what they are doing to prevent scams in the low-income communities.
 - ii. **Follow-up:** The facilitators will explore with utilities how EE offerings can be better integrated or leveraged with programs targeting IQ customers.

- b. Energy Efficiency Education and Providing Information to Customers
 - i. **Follow-up:** Nick Horras of Resource Innovations will include a question on how CAAs would like to support to do outreach on weatherization and solar in an upcoming survey. He will share the outcome with the working group at a later meeting.
 - ii. **Follow-up:** At the next large group in-person meeting, Elevate's IL Solar for All Grassroots outreach RFP efforts will be shared.
 - c. Addressing In-Home Repairs
 - i. **Follow-up:** The facilitators will reach out to Rebuilding Together to better understand their referral network with CEDA.
 - d. Addressing Other IQ Customer Barriers to Participation
 - i. **Follow-up:** The facilitators will reach out to the utilities and Citizen's Utility Board to understand if there are there any efforts by the utility to educate consumers on avoiding utility scams.
 - ii. **Follow-up:** The facilitators will reach out to organizations (Latinx Churches, *World Relief Chicago for Refugee Resettlement*, and organizations currently partnering with utilities) mentioned that work with immigrants and refugee populations to assess opportunities to collaborate with utilities.
 - iii. **Follow-up:** The facilitation team will reach out to the utilities to verify that they are not asking customers for social security information to open utility accounts.
 - iv. **Follow-up:** To understand gaps in IQ Customer user experience, the facilitators will follow-up with the utilities to understand how current low-income customers are utilizing information via their online accounts and what apps they are considering for IQ customers to enhance user experience.
5. **Next meeting:** The next meeting date will be shared soon.
- a. **Topics will include:** Customer experience map (utilities and Delta Institute will share templates, incorporating environmental justice communities into the mapping); integration of IQ programs with bill assistance- AG's office will discuss New York fact sheet; update on follow-up items.