

**Income Qualified EE Advisory Committee North:  
Program Feedback Working Group Meeting #2**

Monday, June 10<sup>th</sup>, 2019  
10:00am – 12:00pm

**Attendee List and Meeting Notes  
Webinar Conference Call**

**Attendees (By-Phone)**

Theo Okiro, Facilitator  
Annette Beitel, Facilitation Team  
Celia Johnson, Facilitation Team  
Mary Ellen Guest, Chicago Bungalow Association  
Gillian Wineman, Chicago Bungalow Association  
Foluke Akanni, Citizens Utility Board  
Kevin Dick, Delta Institute  
Nick Dreher, MEEA  
Katherine Elmore, Community Investment Corporation  
Omy Garcia, Peoples Gas - North Shore Gas  
Aimee Gendusa- English, Citizens Utility Board  
Laura Goldberg, NRDC  
Julie Hollensbe, ComEd  
Nick Horras, Resource Innovations  
Cheryl Johnson, People for Community Recovery  
Mike King, Nicor Gas  
Christopher Vaughn, Nicor Gas  
Karin Konrath, ComEd  
Monique Leonard, Ameren IL  
Karen Lusson, IL Attorney General's Office  
Samarth Medakkar, MEEA  
Dan Moring, Slipstream  
Melvin Nicks, ComEd  
Briana Parker, Elevate Energy  
Kristen Pratt Kalamann, Resource Innovations  
Michelle Pulce-Flynn, IACAA  
Yami Newell, Elevate Energy  
Louise Sharrow, Elevate Energy  
Jacob Stoll, ComEd  
Dan Westin, Franklin Energy

## Opening and introductions (Theo Okiro, Facilitator)

- **Follow-up items from April 2<sup>nd</sup> meeting**
  - No comments

## Presentation on New York City's *Shine A Light on Your Utility Rights* Poster (Karen Lusson, IL Attorney General's Office)

- **Summary:** We need to understand the experience of the Illinois customer to replicate this poster in Illinois.
- **Karen Lusson, IL Attorney General's Office:** What information should be included if an IL poster is replicated?
  - **Comment by Aimee English, Citizens Utility Board:** Entering the convo with consumer rights is a good angle to start the conversation: bill payments, customer rights, avoiding scams.
  - **Comment by Annette Beitel, Facilitation Team:** We need to determine the key issues and the best way to include them in the poster.
  - **Comment by Laura Goldberg, NRDC:** An info we can include in the poster is emphasizing Energy Efficiency as a long-term solution. Customers having bill assistance and energy efficiency as a solution. Tie energy efficiency in with the right message. We need to use the right language and connect the communications.
  - **Comment from Karin Konrath, ComEd:** Agreed, we need to tie in more messaging about EE.
  - **Comment from Karen Lusson:** The NYC poster could have included more information on EE programs that are available.
- **Comment by Aimee English:** CUB just published a booklet similar – though it doesn't have graphics and pop arts like the New York poster does. CUB can share a link of their booklet with the working group. The CB booklet is focused on rights and benefits.
  - The facilitators will share this fact sheet with the working group.
- **Question to address from Theo Okiro, Facilitator:** How can the poster be useful for CBOs/CAAs?
  - **Comment from Michelle Pulce-Flynn, IACAA:** Though she thinks the poster is a useful training tool for the CAAs, the first step is perhaps having a survey to find out if the poster will be useful for the CAAs. It is very visual for any population and user friendly. IACAA can present the poster at their energy committee.
    - The facilitators will follow-up with Michelle on this.
  - **Comment from Karen Lusson:** Center for Urban Pedagogy (CUP) held focus groups and brought it to communities to determine design and format.
  - **Comment from Kevin Dick, Delta Institute:** We need to determine who the audience is, is it for community groups? IQ customers? Perhaps we can interview customer groups to understand their channel. We need to understand what the Illinois people need and their pain points. We can keep the information the same but have a different design – something still eye-catching and interactive.
  - **Comment from Mary-Ellen Guest, Chicago Bungalow Association:** The poster will be useful for different groups – particularly when dealing with low info

groups and seniors. She can envision using it for presentations at community events. The poster is so bright and colorful, and it communicates a lot of info in a great way.

- **Question to address from Theo Okiro:** What are some effective strategies and partners needed to market the poster to IQ customers? PULP is distributing the poster to people across New York State via in-person trainings and through legal services organizations, housing rights advocates, and elected officials. PULP also presents the guide at community meetings, health fairs, community board events, and senior centers.
  - **Comment from Karen Lusson:** We can employ a holistic approach. It can be distributed with LED distribution centers.
    - **Facilitators will work with Karen to determine next steps with the poster and further development.**
  - **Question from Kevin Dick:** Many IQ customers are going into arrears. This product speaks to customers that can't get access to subsidies. Is there a different product or service for them?

## Overview on Customer Journey/ Experience Maps

### I. Introduction to Customer Journey Maps (Kevin Dick, Delta Institute)

- **Summary:** It is important to design different products and services by keeping in mind the target population.
- Kevin can send around full studies on low-income digital adoption + age.
  - **Facilitators will follow-up with Kevin for this study.**
- **Comment from Laura Goldberg:** We need to discuss how to target customers with arrears using EE.
- **Comment from Aimee English:** ComEd is getting ready to launch Arrears Reduction Program (SARP Program).
- **Comment from Kevin Dick:** We need to be empathetic with customers who are experiencing arrears. Consumers Energy and The Heat and Warmth Fund (THAW) was able to take people out of arrears using EE.
  - **Facilitators to assess opportunity for THAW to present on this study.**
- **Comment from Karen Lusson:** There is a study that shows the relation between high usage and non-payment of bill. The dockets are pending on the SARP.

### II. ComEd's Customer Experience Maps (Jacob Stoll, ComEd)

- **Summary:** ComEd is working to personalize their IQ programs. The goal is to triangulate pieces of info on customers into a more satisfying experience.
- **Question from Annette Beitel:** Regarding the findings that "current energy efficiency programs fall short with effectively supporting and influencing a spectrum of IQ customer mindsets," What are the actionable changes that ComEd will make based on this finding?
  - **Jacob Stoll:** This finding is directly related to ComEd's internal insights. It might not meet expectations of tailored approach.

- **Question from Annette Beitel:** What are changes you'd like to see in ComEd's programs based on these insights? Is it to increase savings + participation? How will the insights be operationalized?
  - **Jacob Stoll:** The results are not from the participation perspective. The internal question is how we can reduce friction in customer experience, to steer IQ customers down the EE path.
- **Question from Annette Beitel:** Can ComEd bundle EE + Bill assistance based on these findings?
  - **Jacob Stoll:** These are broad insights. We are still synthesizing results. Wants to circle back with stakeholders for ideation.
- **Comment from Annette Beitel:** We need to hear back from ComEd on specific action items. We do have a lot of entities that have experience with IQ customers. We hope ComEd can consider partnering with these organizations in the future.
- **Question from Karen Lusson:** Can you clarify the finding that "customers often have difficulties recognizing they had participated in programs" that helps them to be more energy efficient.
  - **Jacob Stoll:** This is more kit distribution; customers had not realized it was an EE program. Additionally, customer may not associate IHWAP with ComEd.
- **Question from Annette Beitel:** What is the problem you are trying to solve? What metric have you established to see if the findings are adding value?
  - **Jacob Stoll:** We are drawing on parallel experiences to create better experiences and address pain points. How can we make it more interactive?
- **Question from Annette Beitel:** Regarding metrics, what will increase?
  - **Jacob Stoll:** Customer satisfaction. This can optimize experience + process. It could be more EE projects? Savings? Current process in place? We are looking to come up with metrics in success.
- **Comment from Annette Beitel:** We encourage ComEd to think more about value from using Accenture.
- **Question from Aimee English:** We believe data gathering is mandated. Can the funds be given to CAAs for data gathering+ building capacity?
- **Comment from Michelle Pulce-Flynn:** These findings are interesting. ComEd working with CAAs in the future is a great suggestion but these current findings are also valuable. A suggested next step is a pilot with CAAs + CBOs to see how mapping can help them at a local level.
  - **Facilitators will work with ComEd to assess this possibility.**
- **Comment from Karin Konrath:** This research is one piece of a massive puzzle. The exercise with Accenture was informative for internal folks in a much grander scale. This exercise was brought in to solve bigger concepts. ComEd does other things with IQ research. This is part of what they are looking at. ComEd can provide more info on goals + metrics at future meetings.

### **Follow-up Items & Key Next Steps**

1. **New York Poster:** The facilitators will work with Karen Lusson of the IL Attorney General's Office to determine next steps.

- a. [CUB Fact sheet](#) – CUB fact sheet referenced by Aimee English. This is a Handbook for Residential Gas and Electric Customers in Illinois
2. **Customers in Arrears:** This will be included in potential topics for future working group meetings.
3. **Next meeting:** The next meeting date will be Monday, September 9<sup>th</sup>. A meeting invite will be sent soon.