

# Overview on IQ North Committee 2019 Memos



**Theodora “Theo” Okiro**

Senior Policy Analyst, Future Energy Enterprises, LLC

Facilitator of the Income Qualified Committees

IQ North 10/30/2019 Meeting

# Agenda

2

- Background of IQ North Committee Feedback
- IQ North Tracking Document
- 2019 IQ North Committee Feedback
  - Addressing “Hard-to-Reach” IQ populations.
  - Energy Efficiency Education.
  - Marketing and Outreach.
- Memo Next Steps
- Small Group Breakout Questions

# Background

3

- Stipulation of the Future Energy Jobs Act (FEJA) for the utilities to convene an advisory Committee.
  - First IQ North meeting April 3<sup>rd</sup>, 2018.
- Committee feedback is tracked at every meeting.
  - IQ North Tracking Document.
- Feedback Components of the Tracking Document
  - In-person Committee meetings (majority of feedback).
  - One-on-one outreach meetings with CBOs and CAAs.
  - Informal discussions with Committee stakeholders.

# IQ North Tracking Document



4

- After each meeting, the tracking document is updated with Committee feedback and input on each topic.
- It is sent out and uploaded to the [IQ Committees website](#)

| Meeting Date                                  | Topic  | Keyword                   | Committee Feedback   | Organization(s)               | Response / Next Steps  | Status (Open/Closed) | Follow-Up Notes   |
|---|--|---------------------------|--|-------------------------------|--|----------------------|---|
| <b>IQ North Meeting #7: July 11, 2019</b>     |  |                           |  |                               |  |                      |   |
| Meeting #7: 7/11/2019                         | Key CEO Recommendations on Addressing Hard-to-Reach IQ Customers | Hard-to-Reach Populations | 1. Be mindful of educational gaps when marketing and framing EE offers. 2. Utilize clear and accessible language when trying to reach "hard-to-reach" IQ customers. 3. Build strong relationships with trusted messengers and community leaders. 4. Focus on quality of interactions not quantity. 5. Effectively share utility-relevant information with communities & reframing EE for targeted populations.   | IQ North Committee            | These recommendations will be compiled into a memo that will be approved by the Committee. The memo will then be submitted to the IQ North utilities for response. | Open                 |   |
| Meeting #7: 7/11/2019                         | Chicago Bangalore Association Of Realtors Program                | Program Design            | Of the pool of rejected energy savers, 55% are rejected due to existing attic insulation, even if the insulation is DIY.   | Chicago Bangalore Association | ComEd has been discussing how to address this issue. They have been discussing how to address the rejection going forward.   | Resolved             |   |
| <b>IQ North Meeting #6: February 6, 2019</b>  |  |                           |  |                               |  |                      |   |
| Meeting #6: 2/6/2019                          | Key Feedback on Addressing Hard-to-Reach IQ Customers            | Hard-to-Reach Populations | Populations of IQ Customers that are hard to reach include: IQ Customers unable to access technology for smart thermostats and automation on EE programs, multi-family customers (for those, customers who qualify for programs but do not receive any assistance), customers that live outside of the 95-100% Aff. single, lower income customers that do not manage their energy bills but could still benefit from EE programs. Specific utility, consent challenges. | IQ North Committee            | The Committee will continue to discuss this topic with possible solutions to address these populations.  | Open                 | At the July 11, 2019 meeting, CEOs presented an effective strategy for building trust and reaching identified hard-to-reach IQ populations. |
|   |  | Hard-to-Reach Populations | A major barrier to accessing these customers is TRUST; utilities need to counteract the trust concerns. Customers are concerned that participation will lead to getting in trouble in other areas (example undocumented immigrants).   | People for Community Recovery | The Committee will continue to discuss this topic with possible solutions to address these populations.  | Open                 | At the July 11, 2019 meeting, CEOs presented an effective strategy for building trust and reaching identified hard-to-reach IQ populations. |
|   |  | Hard-to-Reach Populations | Idea: meet families where they are located, hire community ambassadors that can build trust with residents and share info about EE, engage CEOs to be the ones interacting with customers.   | CEEA, CDFI                    | The Committee will continue to discuss this topic with possible solutions to address these populations.  | Open                 | At the July 11, 2019 meeting, CEOs presented an effective strategy for building trust and reaching identified hard-to-reach IQ populations. |
| <b>IQ North Meeting #5: December 11, 2018</b> |  |                           |  |                               |  |                      |   |
| Meeting #5: 12/11/18                          | Feedback on utility marketing presentations                      | Marketing and Outreach    | 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 CEOs in their plans.  | Franklin Energy               |  | Open                 |   |
|   |  | Marketing and Outreach    | Align marketing strategies with facilitation team's outreach work. A more intentional  | Franklin Energy               |  |                      |   |

# 2019 IQ North Committee Memos



5

- The Committee feedback compiled in the tracking document were used to create 3 distinct memos on the following IQ North topics:
  - Addressing Hard-to-Reach Populations
  - Energy Efficiency Education
  - Marketing and Outreach

# Memo 1: Hard-to-Reach IQ Populations

6

- **Topic:** Who are the IQ Committees that are particularly difficult to reach? How do we build trust with them?
- **Key Recommendations:**
  - Utilize **clear and accessible language** to market EE.
  - Build **strong relationships with trusted messengers** and community leaders.
  - Consider **increasing one-on-one grassroots outreach** rather than mass marketing campaigns.
  - Effectively **share utility related information** and local activities with communities.
  - **Reframe Energy Efficiency (EE) for the targeted IQ population** using relatable language such as “lower utility bills,” “home draftiness.”
  - Create **positive customer service experience** by hiring local reps or having cultural competency training.

# Memo 2: Energy Efficiency Education

7

- **Topic:** How to tackle the Energy Efficiency (EE) knowledge gap.
- **Key Recommendations:**
  - **Develop other approaches for educating IQ Communities** about what EE is and why it is important.
  - **Engage local EE Community Ambassadors** and other trusted voices to get the word out about the importance of EE.
  - **Create fact sheet that lists all energy related savings** and bill assistance opportunities for IQ customers.
  - **Build strategic and targeted campaigns that educate IQ Communities** on the intersection of EE, jobs, housing stability and economic development.

# Memo 3: Marketing and Outreach

8

- **Topic**: How to effectively reach IQ Communities with energy efficiency programs.
- **Key Recommendations**:
  - **Consider utility co-branding and co-branding** with CBOs and CAAs.
  - **Leverage CAA networks** as much as possible.
  - **Use influential community networks** such as Alderman Offices, municipalities and hospitals.
  - **Tailor marketing strategies** to address differences between tenants vs. homeowners.
  - **Leverage people's lifestyles** such as community-wide pastimes.
  - **Track geographic participation** to identify gaps.
  - Utilize both **traditional media** (radio ads) and **new media** (apps).



# Memo Next Steps

9

- **Today's Goals: Any suggested edits to Committee Feedback?**
  - Did we accurately capture your feedback?
  - Did we miss any Committee recommendations related to the topic?
- **The memos will be presented to the three IQ North utilities (Peoples Gas- North Shore Gas, ComEd and Nicor Gas)**
  - At the Dec 5<sup>th</sup> IQ North meeting, we will seek to create consensus on “the action” to address each recommendation.
  - The utilities will present on how each recommendation will be addressed for Committee discussion.

# Small Group Breakout Questions

10

1. Does each memo accurately capture key feedback from the Committee?
2. Is there any additional feedback on the topics that the Committee would like addressed?