

**Income Qualified EE Advisory Committee North:  
Program Feedback Working Group Meeting #3**

Tuesday, October 22nd, 2019

9:30am – 12:00pm

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

**Attendees (By-Phone)**

Theo Okiro, Facilitator  
Celia Johnson, Facilitation Team  
Alberto Rincon, Facilitation Team  
Foluke Akanni, Citizens Utility Board  
Karen Lusson, National Consumer Law Center  
Aimee Gendusa-English, Citizens Utility Board  
Jean Ascoli, ComEd  
Jordan Berman-Cutler, ComEd  
Larry Dawson, IACAA  
Nick Dreher, MEEA  
Katherine Elmore, CIC  
Omy Garcia, Peoples Gas - North Shore Gas  
LaJuana Garrett, Nicor Gas  
Laura Goldberg, NRDC  
Nick Horras, Resource Innovations  
Mary Ellen Guest, Chicago Bungalow Association  
David Hernandez, ComEd  
Lalita Kalita, ComEd  
Samarth Medakkar, MEEA  
John Pady, CEDA  
Daniel Moring, Slipstream  
Jennifer Morris, ICC Staff  
Yami Newell, Elevate Energy  
Melvin Nicks, ComEd  
Andy Odom, Community Contacts Inc,  
Kristen Pratt Kalaman, Resource Innovations  
Elena Savona, Elevate Energy  
Louise Sharrow, Elevate Energy  
Jacob Stoll, ComEd

Rukia Streeter, Rockford County CAA  
Dan Westin, Franklin Energy  
Jenny Riley, Elevate Energy  
Julie Hollensbe, ComEd  
Lowell Tosch, Community Contacts Inc,

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

1. **Next Meeting:** The next meeting is anticipated in Q1 2020.
2. **ComEd's IE Offerings:**
  - a. **Affordable Housing New Construction Updates:** The Facilitation team will work with ComEd to share details of new standard for AH New Construction, share compliance path with CIC and facilitate meeting with CIC.
  - b. **ComEd's IE Product Offerings:** The IQ Facilitation Team will follow-up with ComEd to determine how the window A/C units are not meeting goals.
  - c. **ComEd's Retrofit Offerings:** The IQ facilitation team will follow-up with ComEd to determine how many homes have previously been deemed ineligible to receive SF retrofit.
3. **Nicor Gas Contractor Channel:**
  - a. IQ Facilitation Team to conduct outreach to Nicor Gas' CBO partners to participate in IQ North Committee.
  - b. Nicor to follow-up with ComEd on coordinating efforts to streamline programs, offerings, reduce costs.
  - c. The IQ facilitation team will follow-up with Resource Innovations for a detailed list showing numbers comparisons (data on program dollars + comparisons).
4. **Peoples Gas- North Shore Gas Program Offerings:**
  - a. PG-NSG to investigate working with ComEd, Nicor on joint weatherization kit program.
  - b. **Peoples Gas – North Shore Gas PHES Program:** The IQ facilitation team will follow-up with PG-NSG for details on ICC Certification requirements.
  - c. **Peoples Gas – North Shore Gas Weatherization Kits:** The IQ facilitation team will follow up with PG-NSG to find out whether LIHEAP customers are made aware of all programs they qualify for (such as a pamphlet that explains all program offerings).
5. **IE Program Offerings:** The IQ facilitation team will follow-up with each utility to determine whether they have a pamphlet that describes all their program offerings.

### **Opening and Introductions (Theo Okiro, Facilitator)**

- Purpose of today's meeting is to solicit feedback on IQ program design and challenges.

- Follow-up and Action items are highlighted in yellow.
- **NOTE:** All IHWAP/Weatherization follow-up items will be sent to the SAG Facilitator for consideration in future SAG discussions related to weatherization and IHWAP.

### ComEd Income Eligible Programs (Jean Ascoli, ComEd)

- **Jean Ascoli, ComEd:** *on Omni Bulbs*
  - ComEd started rollback on Omni LEDs on all programs except direct-install. After sunset changes, slowed down the rollback. Eliminating LEDs from Big Box and Warehouse distribution but substantial increase with smaller retailers. Direct install, same level. In 2020, there will be half of distribution for foodbanks.
- **Question from Karen Lusson, NCLC:** What will replace omni offering? Will it be half the amount of kits while considering other products?
  - **ComEd Response:** Still exploring additional offerings, including LED products that aren't affected by TRM. It will not be half the amount. We are exploring other scenarios. We do not have the final program offering and are exploring other lamp types (still LED).
- **Jean Ascoli, ComEd:** *on Income Eligible Product Offerings*
  - ComEd is phasing out window AC units at retailers due to cost but phasing in with measures that drive greater savings for customers.
- **Question from Karen Lusson, NCLC:** What are the other products that will replace this phase out?
  - **ComEd Response:** We are shifting resources from the measure due to the TRM. This is an impact to product discount placement.
- **Question from Aimee English, CUB:** Can you provide more data on how the A/C are not meeting goals?
  - **Follow-up item:** The IQ Facilitation team will follow-up with ComEd for this data.
- **Comment from Karen Lusson, NCLC:** It is hard to provide feedback without knowing what will replace window AC units. Any input from CAAs?  
It is important to step back and think about the FEJA statute and how low-income programs should be implemented. It does not require cost effectiveness, not just about accumulating savings. The agency channel is not impacted by the phasing out of A/C units, it is just the retail channel.
- **Question from Katherine Elmore, CIC:** Does this affect multifamily savings?
  - **ComEd Response:** No effect from the rollback. The impact is to shift dollars to programs where the utility can have higher impact as opposed to these instore discounts.
- **Jean Ascoli, ComEd:** *on Income Eligible retrofit offerings*
  - ComEd is meeting stipulation requirements for the programs.

- A recent analysis showed that a larger percentage of ComEd's IE customers live in Multi-family. We will be shifting our offering to better match actual demographics in 2020.
- **Jean Ascoli, ComEd: on CVHA Single Family Retrofits and home savings calculator**
  - Franklin Energy tool (home savings calculator) will assess existing opportunities for savings, including potential health and safety costs. It will also reassess ineligibility requirements for SF-CBA programs.
- **Question from Karen Lusson, NCLC:** There used to be a requirement that if a home had insulation previously installed, it would no longer be eligible for weatherization (Chicago Bungalow). Is this still accurate?
  - **ComEd Response:** Due to this calculator the program will no longer exclude all participants with existing insulation.
- **Question from Theo Okiro, Facilitator:** What about homes that were previously deemed ineligible? Will the program be going back to those homes?
  - **ComEd Response:** There's a good chance we will go back to those homes.
- **Question from Nick Dreher, MEEA:** How many homes have been previously deemed ineligible?
  - **ComEd Response:** We did not gather that information for this presentation.
  - **Follow-up item:** The IQ Facilitation Team will follow-up with this data.
- **Question from Laura Goldberg, NRDC:** Regarding the PHES calculator, is MF included?
  - **ComEd Response:** No, it is only SF.
- **Question from Laura Goldberg, NRDC:** Will budget change in 2020 compared to 2019?
  - **ComEd Response:** The budget will be greater for MF, and smaller for SF due to ramp-up needed in 2019.
- **Jean Ascoli, ComEd: on Affordable Housing New Construction, updated MF Standard**
  - Elevate couldn't serve them because they weren't MF and they didn't meet AH standard.
  - New path created to get more measures installed in these buildings that do not meet previous standard.
- **Question from Karen Lusson, NCLC:** On this slide, the "High-Performance HVAC Equipment," what is this difference?
  - **ComEd Response:** It will provide more savings and comfort.
- **Comment Laura Goldberg, NRDC:** This new compliance path is commendable. We have previously noticed a gap from developers regarding new construction and MF retrofits. We are excited to see ComEd is addressing it.
- **Question from Karen Lusson, NCLC:** Can you share ComEd's IE savings this year and projected for 2020?
  - **ComEd Response:** 2019, 11.8% of savings came from IE programs; in 2020 expect 10.4% savings from IE

- **Question from Katherine Elmore, CIC:** 1/3 of developers we work with have been excluded, will they get chance to review alternate standard? Can CIC review the compliance path?
  - **ComEd Response:** Yes, CIC can review it. We worked with CIC to develop this path. We will be sure to share new standard.
    - **Action item:** The Facilitation team will work with ComEd to share details of new standard for AH New Construction, share compliance path with CIC and facilitate meeting with CIC.

### Nicor Gas IQ Programs (Mike King, Nicor Gas)

- **Mike King, Nicor Gas: Introduction to Topic**
  - Nicor Developed contractor channel in 2018; we were not hitting goals and created this to hit IE customers more quickly with weatherization.
  - Worked with DBEs: Urban Efficiency (SF) and Anura Energy (MF).
  - Contractor Channel very cost effective (~\$6 per therm) compared to CAA Channel (~\$13.50 per therm).
- **Question(s) from Karen Lussion, NCLC:**
  - This is not an apples-to-apples comparison; each program does something different, additional services and costs involved; can't truly directly compare in this manner with accounting for these differences.
  - Why does Nicor not work with ComEd to develop more joint programs?
    - **Nicor Gas Response**
      - Understands that ComEd was centralized in Chicago.
      - Mismatch of territory makes it seem like not an effective partnership.
- **Comment from Karen Lussion, NCLC:** There are lots of alignment in both territories. There should be more coordination.
  - **Comment from Chris Vaughn, Nicor Gas:** ComEd is Chicago-centric. Nicor wants programs that are more focused on their territory.
- **Comment(s) from Jordan Berman-Cutler, ComEd:**
  - We serve more than just immediate Chicagoland area; we reach the west side of State.
  - ComEd is open and willing to work with Nicor beyond the Chicagoland area.
    - **Nicor Gas Response:** We are open to working on this but want to make sure we have flexibility to serve Nicor Gas customers as best as possible.
- **Comment from Chris Vaughn, Nicor Gas:** We may be able to work more through CAA channels but have been working on Contractor channels independently.
- **Comment(s) from Karen Lussion, NCLC:**

- Unless statistic exists that majority of service territory not served by ComEd, doesn't make sense to have parallel programs. Working together can help reduce administrative costs.
- Stipulation states that joint programs should be pursued when practicable.
- **Question from Theo Okiro, Facilitator:** Can you give detail on differences between the contractor channel and the IHWAP braided program?
  - **Nicor Gas Response:** No real difference outside of no electric measures.
- **Question from Karen Lusson, NCLC:** Are your criteria in your program same as the IHWAP program?
  - **Nicor Gas Response:** Yes. Large portion of difference is administrative.
- **Question from Karen Lusson, NCLC:** What about health and safety?
  - **Nicor Gas Response:** Also, a part of the numbers.
- **Comment from Laura Goldberg, NRDC:** Is the only difference in expense administrative cost?
  - **Nicor Gas Response:** Yes
- **Question from Laura Goldberg, NRDC:** Concerned about competition from a customer standpoint given that there are so many different implementers out there- has there been confusion in the marketplace?
  - **Nicor Gas Response:**
    - CAAs don't offer MF, but Nicor does communicate readily that there are benefits to their programs. This addresses the confusion issue. Communication with the landlord is key.
    - Nicor is trying best to work with hard-to-reach customers that haven't engaged with CAA or haven't engaged with an org that provides MF support.
- **Comment from Karen Lusson, NCLC:** Can Elevate Energy share their outreach tactics for their MF program?
- **Comment from Yami Newell, Elevate Energy:** Communicate with customers in very "grassroots" manner, one-on-ones, community meetings, etc. We talk about these programs as part of ComEd's portfolio.
- **Comment from Louise Sharrow, Elevate Energy:** Elevate works in the entire ComEd territory for their MF program. Some customers have indicated confusion from being contact by multiple organizations (Nicor and CAA).
- **Comment(s) from Karen Lusson, NCLC:**
  - Hearing that there is extensive outreach going on by CAAs, but having multiple organizations causing confusion is an issue.
  - It would be great if differences between programs were made clear so that we can have meaningful conversations about how to improve customers or better coordinate.
  - **Nicor Gas Response:**

- This is an opportunity to coordinate between Nicor and CAA/CBO.
  - Nicor only offers gas but can refer to Elevate for electric measures.
- **Comment from Laura Goldberg, NRDC:** Would be great if program can be streamlined to avoid multiple touchpoints instead of mere referrals. It is difficult to get into MF buildings more than once.
  - **Nicor Gas Response:**
    - Open to coordinating and discussion but wants to make sure this can be done efficiently as possible.
- **Mike King, Nicor Gas: on SF services**
  - Outreach led by Urban Efficiency.
  - Done within 60 days: application, assessment, approved, work is done.
  - Customers self-certify their income level.
  - CAA channels take a long time to get to and serve customers.
  - **Action item:** The IQ Facilitation team will reach out to Nicor Gas to conduct outreach to Nicor Gas' CBO partners and identify other possible CBOs that would participate in the IQ Committees.
- **Comment from Karen Lussion, NCLC:** Would love to hear from CAAs because I heard they “knocked it out of the park” with their programs in 2019.
- **Question from Aimee Gendusa-English, CUB:** What’s the explanation for the high price per therm?
  - **Nicor Gas Response:** It’s a combination of the material and the admin cost.
- **Comment(s) from Kristen Pratt Kalamán, Resource Innovations:**
  - There is program support and admin on top of every dollar spent. Outreach expenses are partially paid from separate funding stream. Could take deeper look at numbers and follow up to provide clarity.
  - **Follow-up Item:** Kristen will share detailed list showing numbers comparisons (data on program dollars + comparisons).
  - Also: they are comparing CAA program compared to Contractor Channel. CAAs focus more of their dollars to SF while Contractor Channel spends more on MF.
- **Comment from Lowell Tosh, Community Contacts:** Disagree with Nicor Gas about CAAs not serving customers on time; Community Contacts serves CAAs in less than 60 days. The program level falls off because funding runs out.
  - **Nicor Gas Response:**
    - Agrees, Lowell runs great organization. They do fantastic job with funds and would love to give them more.
    - Sometimes there are just not enough resources for CAAs to service customers and all CAAs are different.
- **Comment from Karen Lussion, NCLC:** CAAs say they are ready and able and willing to ramp up if utilities give them more dollars. Not fair to say that CAAs can’t perform if they are underfunded. Utilities need to work with CAAs to ramp up.

- **Comment from Nick Horras, Resource Innovations:** There is not one-size-fits-all for CAA partners in the network. Some have capacities that max out, some don't. Some have longer wait lists than others
- **Question from John Pady, CEDA:** Nick's statement is accurate. Does Nicor Gas' contractor channel offer the same scope of services across Contractor and CAA channels?
  - **Nicor Gas Response:** Yes
- **Comment from Jean Ascoli, ComEd:** The utilities are challenged in the apples to apples comparison in how much is being offered, program costs, criteria etc. There are differences in delivery. It is not the same across channels. We believe utilities owe stakeholders more information on exact breakdown of spend across channels.
  - **Follow-up item:** The IQ Facilitation Team will share a summary of feedback and action items regarding weatherization with the SAG Facilitator.
- **Mike King, ComEd:** *SF retrofits offered*
  - Home assessments, no cost energy saving products, building shells, mechanicals, health & safety.
  - Furnace- If repairable, will repair it, but if close to end of useful life, will replace.
  - Spending cap doesn't always apply; it is imperative is to leave home as energy efficient as possible.
- **Comment from John Pady, CEDA:** Look at lifecycle standards and decide if replacement can happen; there is an age and efficiency requirement, can be either or spending 11-15K per repair/replace
- **Mike King, Nicor Gas:** *MF program services*
  - Working with Anura to nurture relationships with property owners.
  - Initial outreach in Naperville, Westmont, Addison and Evanston.
- **Mike King, Nicor Gas:** *MF retrofits offered*
  - Same offerings as SF, as needed.
  - Buildings with 5 units or more are being targeted.
- **Question from Karen Lusson, NCLC:** Are there dollar caps per building? What about co-pays?
  - **Nicor Gas Response:** We approach the project as needed; if 175 replacements required, we do it as needed even without co-pay. If within reasonable cost, they cover the costs.
- **Question(s) from Katherine Elmore, CIC:** Are you only targeting portfolios that start at 100 units? Are you doing income verification for individual units? Are you targeting "naturally occurring" affordable housing units?
  - **Nicor Gas Response:**
    - Income verification is tenant based.
    - Works with management company to release info on this.
    - MF targets buildings with 5 units or more.



- Mostly working with CBO/CAAs that know of building tenants that are underserved.
  - Nicor Gas is now serving services not previously served to these units.
- **Comment from Laura Goldberg, NRDC:** For “naturally occurring affordable housing,” there is a barrier for income verification. There is a forthcoming policy change in the policy manual (starting in Jan 2020) to address this.
- **Mike King, Nicor Gas: CBO partners**
  - 360 youth services, Little Friends, Rebuilding Together, BeaksCo, Naperville Response for Veterans, Almost-home Kids, Will County Seniors, Shore Community Services
- **Question from Laura Goldberg, NRDC:** How were partners selected?
  - **Response from Nick Horas, RI:**
    - RI had some existing relationships. Will need to refer to Program Manager Beatrice Quach.
    - **Follow-up item: IQ Facilitation Team to follow-up with RI for more information.**
- **Question from Karen Lusson, NCLC:** How are you targeting customers?
  - **Nicor Gas Response:**
    - Urban Efficiency is a community champion working with community leaders to find people and get them engaged; they find people that didn’t have services offered to them previously.
    - They look for people that might need help.
    - Some CAAs don’t always share lists, have received pushback.
- **Comment from John Pady, CEDA:** Pushback makes sense if they are relying on those lists for receiving funds. Utilities working with CAAs will create more benefit.
- **Comment from Nick Horras, Resource Innovations:** Trying to work with CAAs that have capacity issues is difficult. Agencies are in varying levels of participation. RI is working on piloting referral process for certain agencies.
- **Mike King, Nicor Gas: Weatherization kits**
  - Will be working with CAAs to offer kits as well as direct.
- **Question from Karen Lusson, NCLC:** Why is the kits program not joint?
- **Comment from Jean Ascoli, ComEd:** ComEd is also offering a weatherization kit, should collaborate more about how to effectively serve customers.
  - **Action item: Nicor to follow-up with ComEd on coordinating efforts to streamline programs, offerings, reduce costs.**
- **Question from Yami Newell, Elevate Energy:** Has there been any follow-up on to ensure that kits have been installed? Seems like there should be room for EE Education with this.
  - **Nicor Gas Response:**

- No there is not, but if they get an assessment, that is where additional help or education occurs. We also do follow up surveys.

### Peoples Gas-North Shore Gas IQ Programs (Omy Garcia, PG-NSG)

- **Omy Garcia, Peoples Gas-North Shore Gas: *Public Housing Program***
  - Programs doing well to date
  - Replaced 2500 steam traps serving 434 units
  - 2020 has 1700+ untested in-unit steam traps
- **Omy Garcia, Peoples Gas-North Shore Gas: *PHEs challenges***
  - PHAs required executive level staff to sign Terms; worked with CHA to combine scopes into Master App. and dramatically reduce # of sig's needed
  - PHAs didn't have enough staff available to oversee Direct Installation services
- **Question from Laura Goldberg, NRDC: What kind of education is happening with PHA residents before major work?**
  - **PG-NSG Response:**
    - They are being educated by the staff on-site and prior. They let them know what it will take and work with them to figure out how to move forward.
- **Question from Karen Lusson, NCLC: Who runs the program for PG-NSG?**
  - **Response:** Elevate runs the program on behalf of PG-NSG.
- **Omy Garcia, Peoples Gas-North Shore Gas: *PHEs challenges***
  - Time is needed to educate PHA customers, train and vet contractors.
  - PHAs request contractors they've worked with before.
- **Question from Laura Goldberg, NRDC: What does ICC certification entail?**
  - **PG-NSG Response:**
    - Will need to get back on what they entail.
    - **Follow-up item:** The IQ Facilitation Team will follow-up with Omy Garcia on ICC Certification requirements.
- **Omy Garcia, Peoples Gas-North Shore Gas: *Other programs***
  - Customer feedback not measured in 2018.
  - Other agencies (not CEDA) and building managers are confused because of how many programs exist. They are not sure what programs are available to them. Suggest a concise pamphlet or marketing material that summarizes offerings.
- **Question from Jean Ascoli, ComEd: Currently only one CAA (CEDA) operating in the Chicago-Cook area. What do you mean by "agency"?**
  - **PG-NSG Response:** Smaller CBOs outside of CEDA that don't fully understand. Also, CEDA in take sites. We need more alignment overall on the agency side to explain program offerings.

- **Comment from John Pady, CEDA:** CEDA can share best practices for program offerings. He will also talk to the LIHEAP Director to speak to intake sites about promoting alignment.
  - **Follow-up:** The IQ Facilitation Team will follow-up with each utility to determine whether they have a pamphlet that describes all their program offerings.
  - **Follow-up item:** The IQ Facilitation Team will work with John to get CEDA's best practices
- **Question from John Pady, CEDA:** Can the utilities share aggregated building data?
  - **Follow-up item:** The IQ Facilitation Team will follow-up with the utilities on whether they can share aggregated building data.
- **Question from Karen Lussion, NCLC:** Is Franklin going out and promoting parallel programs?
  - **PG-NSG Response:** No
- **Omy Garcia, Peoples Gas-North Shore Gas:** *IE LIHEAP Kit Pilot*
  - Also distributing IE kit.
  - Previous recipients of LIHEAP grant program automatically invited to participate.
  - Haven't yet thought of doing a joint program; currently doing their own pilot on this kit but may get there later.
  - PG-NSG is currently assessing how best to collaborate on this program. They will initially send out 5,000 kits (with water heater and shower heads).
  - **Action item:** PG-NSG to investigate working with ComEd, Nicor on joint weatherization kit program.
- **Question from Karen Lussion, NCLC:** Will participants qualify for other offerings?
  - **PG-NSG Response:** Will look at the introduction letter to determine this and to ensure all IE offerings are made clear to LIHEAP customers.
    - **Follow-up item:** The IQ Facilitation Team will follow up with PG-NSG to find out whether LIHEAP customers are made aware of all programs they qualify for (such as a pamphlet that explains all program offerings).