

Income Qualified EE Advisory Committee North (IQ North)

Wednesday, October 30th, 2019

10:00am – 2:00pm

2019 IQ North Committee Memos

1. COMMON RECOMMENDATIONS

Per Committee feedback at the October 30, 2019 meeting, the facilitation team has identified the “core recommendations” from all three memos. These recommendations correspond to all three memo topics. The topics are:

- **Addressing Underserved IQ Populations**
- **Energy Efficiency Education**
- **Marketing and Outreach**

CORE RECOMMENDATIONS	
1.	Build strong relationships with trusted messengers and community leaders.
2.	Strive to work with existing, innovative CBOs that are already working with this customer population.
3.	Engage local EE Community Ambassadors and other trusted voices to get the word out about the importance of EE.
4.	Collaborate with community-based organizations and community action agencies for effective outreach.
5.	Tailor marketing strategies to address differences between tenants vs homeowners.
6.	Reframe Energy Efficiency for IQ customers using simple, accessible language that is culturally mindful and that is more relatable, such as “lower utility bills.”
7.	Consider speaking directly with communities about their specific needs before tailoring an approach based on assumptions about those communities.
8.	Connect with other public and/or private energy equity initiatives.

2. ADDRESSING UNDERSERVED IQ POPULATIONS

Objective

In 2018, the Income Qualified North Advisory Committee (IQ North Committee) received feedback in the following ways: one-on-one meetings with Community Based Organizations (CBOs)¹, in-person Committee meetings and informal discussions with Committee stakeholders. **A common, recurring theme was that certain customer types are particularly difficult to reach—** both through traditional marketing and outreach strategies or of energy efficiency awareness campaigns.

Hence, the 2019 Committee Plan included a goal to *“solicit input from the IQ North Committee and Community-Based Organizations representing ‘hard-to-reach’ IQ customer populations on their specific wants, needs and barriers they may face to participating in Income Qualified Energy Efficiency Programs.”*

Committee Process

At the February 8, 2019 in-person Committee meeting, the topic was introduced, and the Committee was asked to answer the following questions:

1. Who should be getting served and reached with Income Qualified EE programs, but is currently not getting served?
2. What are the needs of these communities?
3. What are the unique challenges, barriers and needs that these “hard-to-reach” IQ customer populations face?

REVISED RECOMMENDATIONS	
1.	Be mindful of educational gaps when marketing and framing EE offers; utilize clear, simple, and accessible language that is mindful of cultural differences in language use.
2.	Reframe Energy Efficiency (EE) for the targeted IQ population using concepts that are more relatable for low income customers, such as “lower utility bills.”
3.	Build strong relationships with trusted messengers and community leaders.
4.	Consider increasing both one-on-one outreach and small-group outreach instead of relying on mass marketing campaigns.

¹ “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.*

5.	Proactively share utility-related information and local activities with communities.
6.	Seek to create positive Customer Service experiences for IQ customers by hiring customer service representatives who are from the community or understand it well, or by implementing cultural competency trainings for customer service reps.
7.	Leverage existing data sources, including data on previous applicants to programs, to better understand which underserved populations are participating at lower rates and how we might better reach them.
8.	Strive to work with existing, innovative CBOs that are already working with this customer population.
9.	Work to use language of empowerment in communications to reduce shame and encourage participation in programs that communities have a right to benefit from.

3. ENERGY EFFICIENCY EDUCATION

Objective

In both 2018 and 2019, the Income Qualified North Advisory Committee (IQ North Committee) received feedback in the following ways: one-on-one meetings with Community Based Organizations (CBOs), in-person Committee meetings and informal discussions with Committee stakeholders. As part of these discussions, the Committee sought to understand the barriers that prohibit IQ communities from being aware of and participating in income qualified energy efficiency (IQ EE) programs. The feedback illustrated that an Energy Efficiency (EE) knowledge gap is a barrier to accessing IQ communities with IQ EE programs.

To fully understand and address this barrier, the 2018 and 2019 Committee Plans included a goal to *“solicit input from regional community leaders and CBOs on the needs of and how to better serve disadvantaged communities in northern Illinois through Income Qualified energy efficiency programs.”*

Committee Process

At the May 22, 2018, December 11, 2018 and July 11, 2019 in-person Committee meetings, the Committee was asked to answer the following questions:

1. What barriers exist to reaching IQ customers?
2. In addition to trust, what are the other barriers prohibiting hard-to-reach populations from accessing IQ EE programs?

REVISED RECOMMENDATIONS	
1.	Test different educational approaches and tailor them to be culturally sensitive.
2.	Engage local EE Community Ambassadors and other trusted voices to get the word out about the importance of EE.
3.	Create fact sheet that lists all energy-related savings opportunities for IQ customers.
4.	Build strategic and targeted campaigns that educate IQ Communities on how EE can help create jobs, housing stability, and lead to economic development/justice.
5.	Consider constructing a centralized database or hub (a "one stop shop") that customers can go to for answers to questions about EE, assistance programs, etc.
6.	Consider speaking directly with communities about their specific needs before tailoring an Education approach based on assumptions about those communities.

4. MARKETING AND OUTREACH

Objective

In 2018, the Income Qualified North Advisory Committee (IQ North Committee) received feedback in the following ways: one-on-one meetings with Community Based Organizations (CBOs), in-person Committee meetings and informal discussions with Committee stakeholders. An important objective of the Committee is to identify marketing and outreach strategies that will effectively reach and promote low-income energy efficiency programs to income qualified communities. The goal of this objective is to enhance the participation in and awareness of these programs by IQ communities.

To successfully address this topic, the 2018 and 2019 Committee Plans both included a goal to *"solicit input from the IQ North Committee on marketing and outreach, including what channels are best to reach customers."*

Committee Process

At the May 22, 2018, December 11, 2018 and July 11, 2019 in-person Committee meetings, the Committee was asked to answer the following questions:

1. What barriers exist to reaching IQ customers?
2. In addition to trust, what are the other barriers prohibiting hard-to-reach populations from accessing IQ EE programs?

REVISED RECOMMENDATIONS

1. Collaborate with community-based organizations and community action agencies for effective outreach.
2. Engage community ambassadors from IQ communities to build trust with residents who may have been exposed to utility scams or have an otherwise negative relationship with utilities.
3. Consider co-branding with CAAs and CBOs.
4. Leverage CAA networks as much as possible to promote IQ EE programs etc. to IQ Communities.
5. Identify and use influential community networks and agencies such as municipalities, Alderman Offices, community colleges and hospitals during outreach efforts.
6. Tailor marketing strategies to address differences between tenants vs homeowners.
7. Leverage knowledge on hobbies, past-times, and common lifestyle factors of community members (eg., Fishing Tournaments, Block Parties) when selecting marketing strategies
8. Connect with other public and/or private energy equity initiatives ex, Delta Institute, Robert Woods Foundation.
9. Consider the resource and capacity constraints of CBOs prior to outreach; consider sponsorship opportunities.
10. Track geographic participation to identify areas with lower program participation.
11. Utilize both traditional media and new media social media and smart phone apps to reach IQ communities.
12. Consider adopting a "wraparound service" approach which acknowledges that customers may need utility-related help that is not EE specific; instead, work to refer customers to the appropriate service as needed.
13. Consider speaking directly with communities about their specific needs before tailoring an outreach approach based on assumptions about those communities.
14. Be mindful that property owners may not always be from the communities we work with; this situation requires a different approach in working with these landlords and tenants.
15. Reframe Energy Efficiency for IQ customers using simple, accessible language that is culturally mindful and that is more relatable, such as "lower utility bills."
16. Focus on training CBOs on all opportunities for addressing IQ customer energy burdens. These providers can then continue advising/assisting customers even if program efforts have moved to a different community.