



# **Income Qualified EE Advisory Committee North**

## **2019 IQ North Committee Memos**

December 2019



# Today's Agenda

1. Common Recommendations
2. Addressing Underserved IQ Populations
3. Energy Efficiency Education
4. Marketing & Outreach

# Common Recommendations



## Objectives



## Strategy/Action Plan/Further Discussion

1.	<p><b>Build strong relationships</b> with trusted messengers and community leaders.</p> <p><b>Engage</b> local EE Community Ambassadors and other trusted voices to get the word out about the importance of EE.</p> <p><b>Collaborate</b> with community-based. <b>Connect</b> with other public and/or private energy equity initiatives.</p>	<p>We follow a grassroots approach that collaborates with local and community-based organizations, helping us build a stronger relationship with community leaders</p> <p>Additionally, PGL/NSG has created:</p> <ul style="list-style-type: none"> <li>• A tailored outreach approach for the communities it serves</li> <li>• Asset mapping tools to identify and partner with local leaders such as local elected, block clubs, food pantries &amp; more!</li> <li>• Grassroots customer experience, educating communities and providing them with solutions</li> </ul>
2.	<p>Strive to <b>work with existing, innovative CBOs</b> that are already working with this customer population.</p>	<p>Through partnerships like Elevate Energy, Resource Innovations, CEDA, CAPs of Lake County and the Chicago Bungalow Association; PGL/NSG has a direct impact on local IQ communities.</p> <p>We focus on in-person interactions that educate and encourage trust between the customer and utilities; solely driving benefits such as cost savings, resources available and less promotional messaging. Provide one-on-one interaction; helping customers address concerns and questions is the first step to mending that trust factor.</p>
3.	<p><b>Tailor marketing strategies</b> to address differences between tenant vs homeowner.</p>	<p>Key messaging includes both low-cost direct install measures and deep retrofit programs in the IE portfolio.</p> <p>For example, the Income Eligible Weatherization program focuses on homeowners while our Elevate Energy implemented programs focuses on multi-family buildings. The IHWAP program targets both single and multi-family customers and therefore has a different strategy for each.</p>
4.	<p><b>Reframe</b> Energy Efficiency for IQ customers using <b>simple, accessible language</b> that is culturally mindful and that is more relatable, such as “lower utility bills.”</p>	<p>This concept is being incorporated into our 2020 IE marketing plans and we will review program language to highlight this recommendation.</p>
5.	<p><b>Speak directly with communities</b> about their specific needs before tailoring an approach based on assumptions about those communities.</p>	<p>Continued on-going effort to find more avenues targeting underserved groupings or individuals in a mindful and tailored approach. We believe the IQ North collaboration is a keyway to meet with and listen to community groups.</p>

# Marketing & Outreach



## Objectives



## Strategy/Action Plan/Further Discussion

1.	Consider co-branding with CAAs and CBOs.	PGL/NSG provides co-branded materials for its partners so customers are made aware of energy efficiency programs available through their utilities.  This has created a strong foundation of trust between PGL/NSG organizations. Co-branding can strengthen existing partnerships and build a united sense of trust helping improve engagement with IQ communities.
2.	Leverage CAA networks as much as possible to promote IQ EE programs etc. to IQ Communities.	As part of our partnership with the IHWAP program, PGL/NSG works closely with the Community Action Agencies (CEDA and Lake County) to promote energy efficiency for IE customers.
3.	Identify and use influential community networks and agencies such as municipalities, Alderman Offices, community colleges and hospitals during outreach efforts.	Through outreach efforts, PGL/NSG partners and collaborates with a multitude of community networks and local agencies in IQ communities. Continue efforts that help support community needs, and provide value such as educational opportunities, added resources and facilitate energy efficiency.
4.	Tailor marketing strategies to address differences between tenants vs homeowners.	Please reference plan of action for item #5 (Core Recommendations)
5.	Leverage knowledge on hobbies, past-times, and common lifestyle factors of community members (eg., Fishing Tournaments, Block Parties) when selecting marketing strategies	Continue partnerships and collaborating with trusted organizations to market outreach events in IQ communities. This includes tailored workshops, festivals, block parties, and holiday driven engagement opportunities (such as earth day, energy awareness month, back to school, etc.).
6.	Collaborate with community-based organizations and community action agencies for effective outreach.	Please reference plan of action for item #1 (Core Recommendations)
7.	Consider the resource and capacity constraints of CBOs prior to outreach; consider sponsorship opportunities.	PGL/NSG supports and sponsors community-based organizations across numerous efforts such as process application, outreach incentives and community engagement.
8.	Utilize both traditional media and new media social media and smart phone apps to reach IQ communities.	PGL/NSG uses traditional and digital marketing channels (organic/paid) such as TV, social media (Facebook, Twitter, LinkedIn), radio, email, and direct mail to reach the IQ community. Key learnings from campaigns applied to future initiatives to improve messaging. Further research is needed to verify the most cost-efficient way to use mobile devices as most IQ communities do not have data plans for their smartphones.

# Addressing Underserved IQ Populations



## Objectives



## Strategy/Action Plan/Further Discussion

<p>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.</p>	<p>This concept is being incorporated into our 2020 IE marketing plans and we will review program language to highlight this recommendation.</p>
<p>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.”</p>	<p>Through a deeper understanding of the needs and hardships IQ communities deal with, PGL/NSG prioritizes the needs of their customers by leveraging available resources such as partnerships, marketing and outreach to educate the IQ population on how energy efficiency can facilitate specific needs such as lower utility bills, improved comfort in their home and a healthier/safer way of living.</p>
<p>3. Proactively share utility-related information and local activities with communities.</p>	<p>PGL/NSG is providing rebate and incentive programs that are promoted on its website and by its local community partners.</p>
<p>4. 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.</p>	<p>PGL/NSG and its EE program implementers utilize a highly diversified and local work force and the call centers are continuously trained on cultural and language sensitivities. Our program staff regularly work in all communities throughout the utility territories.</p>
<p>5. 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.</p>	<p>Our residential programs have begun reviewing location-based analysis of program participation. This has been used to understand participation in areas throughout the territory and shift focus to underserved areas. We regularly do this on the Home Energy Jumpstart program.</p>
<p>6. Work to use language of empowerment in communications to reduce shame and encourage participation in programs that communities have a right to benefit from.</p>	<p>PGL/NSG is mindful of their messaging and approach when targeting IQ communities. The Energy Efficiency program is designed to educate and empower <b>all</b> served territories. PGL/NSG is dedicated to help improve the quality of life for IQ communities. This includes continued partnerships with trusted organizations to help provide resources and education that empower customers and provide solutions to improve their quality of life.</p>

# Energy Efficiency Education



## Objectives



## Strategy/Action Plan/Further Discussion

1.	Test different educational approaches and tailor them to be culturally sensitive.	PGL/NSG and through its IC's utilize a highly diversified work force and the call centers are continuously trained on cultural and language sensitivities. Open to discussing further.
2.	Create fact sheet that lists all energy-related savings opportunities for IQ customers.	Approach is by targeting customers with programs that will provide the best savings for the customer. Not all programs are a fit to each customer.
3.	Build strategic and targeted campaigns that educate IQ Communities on how EE can help create jobs, housing stability, and lead to economic development/justice.	Continuously reviewing its outreach activities and will take this recommendation into consideration. This action may be best implemented by a joint effort.
4.	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.	As part of 2020 marketing plans, PGL/NSG is planning to review the energy efficiency program website to provide more information on the income eligible offerings. The current EE website does provide extensive relevant information on the various programs that customers can participate in.



# Marketing & Outreach



## Objectives



## Strategy/Action Plan/Further Discussion

	Objectives	Strategy/Action Plan/Further Discussion
9.	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.	Additional background on this request is needed in order to provide a response.
10.	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.	<p>PGL/NSG recognizes this challenge with property managers and we have built in specific strategies to ensure program success. This includes an outreach approach working with out of town managers and a different one for local managers.</p> <p>Our strategies include large scale property managers that own a portfolio of properties, as well as smaller property owners that only own a few properties.</p>
11.	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.	<p>PGL/NSG will continue to collaborate with community-based organizations to specifically address customer needs and find solutions to improve the quality of life for themselves and loved one.</p> <p>PGL/NSG will provide CBO's with training and needed resources to build on transparency and trust within IQ communities. This will improve how we message IQ communities and clearly showcase the intention of wanting to help improve their day-to-day and find solutions to help save costs and have a safer home.</p>

**THANK YOU!**