

**Income Qualified EE Advisory Committee North  
2018 Meetings  
Tracking Committee Feedback**  
Updated 01/13/2020

**Overview of Tracking Document:**  
 \*\*This tracking document includes a summary of suggestions/feedback and open questions from IQ North Committee participants.  
 \*\*The IQ North facilitators will update the tracking document after each meeting to ensure that feedback from all participants is taken into account and that next steps can be tracked for future meetings.  
 \*\*Key topics for 2018 are identified below, as described in the IQ North 2018 Committee Plan. Additional topics and discussion will also be captured in this tracking document, as needed.

***IQ North Meeting #9: December 5, 2019***

Meeting Date	Topic	Keyword	Committee Feedback	Organization(s)	Response / Next Steps	Status (Open/Closed/Ongoing)	Follow-Up Notes
Meeting #9: 1/13/2020	Utility Responses to 2019 IQ Memo Recommendations	Program Design and Participation	ComEd is doing research into Health and safety – there are some pilots that will begin in 2020. ComEd has worked with some contractors to do research on deferral rates – to determine the application and assessment process.	ComEd	Health and Safety/In-Home Repairs will be discussed at a Program Feedback Working Group Meeting in 2020	Ongoing	
Meeting #9: 1/13/2020	Navigant IQ Participation Rates	Program Design and Participation	We need to ensure that when customers are given kits, they are actually installing them	Navigant	The facilitation team will follow-up with Navigant on their process to determine the proper installation of kits.	Ongoing	

***IQ North Meeting #8: October 30, 2019***

Meeting Date	Topic	Keyword	Committee Feedback	Organization(s)	Response / Next Steps	Status (Open/Closed/Ongoing)	Follow-Up Notes
Meeting #8: 11/4/2019	Key Feedback on EE Education	Energy Efficiency Education	"Energy Empowerment" is suggested to be used in place of "energy efficiency" when seeking to educate communities.	Citizens Utility Board	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.	Closed	This recommendation was included in the 2019 end-of-year IQ North Memo
		Marketing and Outreach	M&O should be "holistic" and focus on addressing the full energy-related needs of an individual customer. Most programs just focus on marketing their individual program, and don't think about the customer's holistic needs.	Citizens Utility Board	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.	Closed	This recommendation was included in the 2019 end-of-year IQ North Memo
		Marketing and Outreach	Marketing efforts should focus on training the community-based service providers on range of opportunities for addressing IQ customer energy burdens. The community-based service providers can then continue advising/assisting IQ customers even if program efforts have moved to a different community.	Citizens Utility Board	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.	Closed	This recommendation was included in the 2019 end-of-year IQ North Memo
Meeting #8: 11/4/2019	Key Feedback on 2019 IQ North Memos	Underserved Populations	Modify "hard-to-reach" populations to be either "underserved" or "undereached."	Resource Innovations	The topic "hard-to-reach" population has been modified to "underserved populations."	Closed	This recommendation was included in the 2019 end-of-year IQ North Memo

***IQ North Meeting #7: July 11, 2019***

Meeting Date	Topic	Keyword	Committee Feedback	Organization(s)	Response / Next Steps	Status (Open/Closed/Ongoing)	Follow-Up Notes
--------------	-------	---------	--------------------	-----------------	-----------------------	------------------------------	-----------------

Meeting #7: 7/11/2019	Key CBO Recommendations on Addressing 'hard-to-reach' IQ customers	Underserved 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-related information with communities. 6. 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.	Closed	This recommendation was included in the 2019 end-of-year IQ North Memo
Meeting #7: 7/11/2019	Chicago Bungalow Association SF Retrofit Program	Program Design and Participation	Of the pool of rejected energy savers app, 65% are rejected due to existing attic insulation, even if the insulation is DIY.	Chicago Bunaglow Association	ComEd has been discussing how to address this issue. They have been discussing how to address the rejection going forward.	Closed	

**IQ North Meeting #6: February 8, 2019**

Meeting Date	Topic	Keyword	Committee Feedback	Organization(s)	Response / Next Steps	Status (Open/Closed/Ongoing)	Follow-Up Notes
Meeting #6: 2/8/2019	Key Feedback on Addressing 'hard-to-reach' IQ customers	Underserved Populations	<b>Populations of IQ Customers that are hard to reach include:</b> IQ Customers unable to access technology for smart thermostats and information on EE programs, multi-family customers (for Nicor), customers who qualify for programs but do not receive any assistance - customers that fall outside of the 80-200% AMI range, Lower income customers that do not manage their energy bills but could still benefit from EE programs, Senior citizens, immigrant families.	IQ North Committee	The Committee will continue to discuss this topic with possible solutions to address these populations.	Closed	At the July 11, 2019 meeting, CBOs presented on effective strategies for building trust and reaching identified hard-to-reach IQ populations. This recommendation was also included in the 2019 end-of-year IQ North Memo
		Underserved Populations	A major barrier to accessing these customers is TRUST: utilities need to counteract the trust concerns, customers are concerned their 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.	Closed	At the July 11, 2019 meeting, CBOs presented on effective strategies for building trust and reaching identified hard-to-reach IQ populations. This recommendation was also included in the 2019 end-of-year IQ North Memo
		Underserved Populations	Idea: meet families where they are located, hire community ambassadors that can build trust with residents and share info about EE, engage CBOs to be the ones interacting with customers.	CEDA, COFI	The Committee will continue to discuss this topic with possible solutions to address these populations.	Closed	At the July 11, 2019 meeting, CBOs presented on effective strategies for building trust and reaching identified hard-to-reach IQ populations. This recommendation was also included in the 2019 end-of-year IQ North Memo

**IQ North Meeting #5: December 11, 2018**

Meeting Date	Topic	Keyword	Committee Feedback	Organization(s)	Response / Next Steps	Status (Open/Closed/Ongoing)	Follow-Up Notes
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 CBOs in their plans.	Franklin Energy	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.	Closed	This recommendation was included in the 2019 end-of-year IQ North Memo
		Marketing and Outreach	Align marketing strategies with facilitation team's outreach work. A more intentional partnership to outreach will help establish more CBOs relationships.	Franklin Energy	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.	Closed	This recommendation was included in the 2019 end-of-year IQ North Memo
		Marketing and Outreach	It is good that the utilities are aligning their brand marketing. But brand marketing and brand recognition should be first step for direct mailers. Introduce the residents to the utility, then send a follow-up mail about the programs. Some residents may be unfamiliar with the utility. After this, it will be easier to deliver program information.	Franklin Energy	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.	Closed	This recommendation was included in the 2019 end-of-year IQ North Memo
		Marketing and Outreach	IQ Customers that are tenants vs. building owners - tenants may not be able to act on EE programs compared to tenants. This must be addressed.	Community Investment Corporation	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.	Closed	This recommendation was included in the 2019 end-of-year IQ North Memo
		Marketing and Outreach	Perhaps we can think of a more holistic savings strategy. Move people across participation spectrum. Maybe they will be a great candidate. Tie EE with demand response. Multiple programs will help maximize or leverage savings.	Elevate Energy	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.	Closed	This recommendation was included in the 2019 end-of-year IQ North Memo
		Marketing and Outreach	When doing hyperlocal targeting- be mindful that there are different communities within a neighborhood.	SML Communications	This recommendation 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.	Closed	This recommendation was included in the 2019 end-of-year IQ North Memo

Meeting #5: 12/11/2018	Barriers to reaching IQ Customers	Energy Efficiency Education	There a lot of barriers- a lot of people don't know what EE means- we need to come up with another language on how to educate them on EE. Perhaps talk about "energy savings or energy affordability."	People for Community Recovery	The July 11, 2019 meeting discussed how to reframe EE for IQ customers	Closed	This recommendation was included in the 2019 end-of-year IQ North Memo
		Energy Efficiency Education	Trust is a huge barrier.	Franklin Energy	At the July 11, 2019 CBOs presented on effective strategies for building trust with IQ customers	Closed	This recommendation was included in the 2019 end-of-year IQ North Memo
		Other	Keep capacity in mind of CBOs/CAAs as a potential barrier.	Elevate Energy	This recommendation 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.	Closed	This recommendation was included in the 2019 end-of-year IQ North Memo
Meeting #5: 12/11/18	Best ways to reach IQ Customers in their Communities	Marketing and Outreach	Perhaps we can utilize the involvement of hospitals and community colleges for reaching IQ Customers. This will help educate homeowners, renters, seniors on options available to them.	People for Community Recovery	This recommendation 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.	Closed	This recommendation was included in the 2019 end-of-year IQ North Memo
		Marketing and Outreach	CAAs are very good with finding IQ Customers. They are a resource that has been underutilized in outreach. CAAs also provide housing help find people with higher AMI, those people with higher AMI need to start outreach with each other. As the information grows, they can do a better job of reaching customers with higher income.	CAP Lake County	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.	Closed	This recommendation was included in the 2019 end-of-year IQ North Memo
		Marketing and Outreach	We must be weary of the trap in using data to determine pockets of poverty. IQ Customers with 80% of AMI may not be living with high poverty.	CAP Lake County	This recommendation 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.	Closed	This recommendation was included in the 2019 end-of-year IQ North Memo
		Marketing and Outreach	In Lake County a lot of people fish- targeting this segment of population is not an outreach CAP currently does, but these people may fall into 80%.	CAP Lake County	This strategy was presented on at the July 11, 2019 meeting.	Closed	This recommendation was included in the 2019 end-of-year IQ North Memo
		Marketing and Outreach	It is important to be more creative and leverage people's lifestyle and not rely solely on data.	CAP Lake County	This strategy was presented on at the July 11, 2019 meeting.	Closed	This recommendation was included in the 2019 end-of-year IQ North Memo
		Marketing and Outreach	Be innovative with technology. <b>Use Apps such as Nextdoor or Sidewalk or Facebook Local.</b> But be sure to still focus on traditional forms of media. There is a population that is not digitally inclined. They will best be continually supported via mail and inserts. There are hyperlocal newspapers within neighborhoods that can also be utilized for marketing and outreach to IQ customers.	SML Communications	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.	Closed	This recommendation was included in the 2019 end-of-year IQ North Memo
Meeting #5: 12/11/18	EE Marketing and Outreach	Marketing and Outreach	Integrate services - bill assistance and other services.	People for Community Recovery	This recommendation 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.	Closed	This recommendation was included in the 2019 end-of-year IQ North Memo
		Marketing and Outreach	We need to discuss how to integrate municipalities to outreach efforts.	People for Community Recovery	This recommendation 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.	Closed	This recommendation was included in the 2019 end-of-year IQ North Memo
Meeting #5: 12/11/18	Coordinating EE Marketing with IL Solar for All	Other	Solar 4 All should not be tied into EE because they are distinct.	Community Investment Corporation		Ongoing	
		Other	It is still early in solar 4 all planning- it is important to understand how the program will be implemented. And then work with that. To engage resources for folks on the ground.	Elevate Energy		Ongoing	
Meeting #5: 12/11/18	Feedback on Facilitation Team's CBO Outreach Presentation	Marketing and Outreach	It is important to target organizations that can make decisions. And to reach out to the right people.	SML Communications	The Facilitation Team will take this under account during 2019 Outreach to CBOs	Closed	This recommendation was included in the 2019 end-of-year IQ North Memo
		Marketing and Outreach	Create a process- what is the process when the outreach occurs? Inform CBOs and community members prior to actual outreach.	SML Communications	The Facilitation Team will take this under account during 2019 Outreach to CBOs	Closed	This recommendation was included in the 2019 end-of-year IQ North Memo
		Marketing and Outreach	"Incentives for participation in IQ North Committee"- Incentives are not a one size fit all, incentives are different for CBOs.	MEEA	The Facilitation Team will take this under account during 2019 Outreach to CBOs	Closed	This recommendation was included in the 2019 end-of-year IQ North Memo
		Marketing and Outreach	It is important to ensure that affordable housing groups and property managers are included in the outreach. Overall, the Committee is pleased with the outreach process.	NRDC	The Facilitation Team will take this under account during 2019 Outreach to CBOs	Closed	This recommendation was included in the 2019 end-of-year IQ North Memo
		Marketing and Outreach	It is important to consider the resource constraints and capacity of the CBO when seeking their participation and engagement in the IQ North Committee.	Elevate Energy	The Facilitation Team will take this under account during 2019 Outreach to CBOs	Closed	This recommendation was included in the 2019 end-of-year IQ North Memo

**IQ North Meeting #4: October 2, 2018**

Meeting Date	Topic	Keyword	Committee Feedback	Organization(s)	Response / Next Steps	Status (Open/Closed/Ongoing)	Follow-Up Notes
Meeting #4: October 2, 2018	Committee Process and Structure	Committee Process	There is interest in a smaller committee or working group to discuss workforce development.	ComEd	The facilitation team anticipates launching this in early 2019 and is currently working on a draft working group plan.	Closed	A workforce development working group was created in 2019
Meeting #4: October 2, 2018	Workforce Development	Workforce Development	We must not lose sight of how important it is to have industry support for programs once they get off the ground	Elevate Energy	This topic will be discussed in the Workforce Development Working Group in 2020	Ongoing	A workforce development working group began in 2019 to discuss this item.
		Workforce Development	We need to get energy companies to provide opportunities and support for these types of programs.	Elevate Energy	This topic will be discussed in the Workforce Development Working Group in 2020	Ongoing	A workforce development working group began in 2019 to discuss this item.
		Workforce Development	There needs to be a cultural change to successfully push people through workforce programs.	Elevate Energy	This topic will be discussed in the Workforce Development Working Group in 2020	Ongoing	A workforce development working group began in 2019 to discuss this item.

**IQ North Meeting #3: July 30, 2018**

Meeting Date	Topic	Keyword	Committee Feedback	Organization(s)	Response / Next Steps	Status (Open/Closed/Ongoing)	Follow-Up Notes
Meeting #3: July 30, 2018	Committee Process and Structure	Committee Process	Even after a concrete plan has been developed, we want to make sure there is still ongoing input from CBOs and CAAs.	Franklin Energy	Theo Okiro (facilitation team) will be meeting one-on-one with CBOs and CAAs and will report back to the Committee. This is also an effort to increase CBO and CAA participation.	Ongoing	One-on-one outreach meetings is a continued efforts
		Committee Process	Working in smaller groups and sub-committees will elicit greater accountability.	Franklin Energy	Facilitation team is looking at different meeting structures.	Closed	2 working groups were developed in 2019
Meeting #3: July 30, 2018	Key 2018 Topic: Marketing and Outreach	Marketing and Outreach	To better engage CBOs and publicize FEJA programs, the External Affairs of the utilities can be better utilized or leveraged	ComEd	Facilitation team will follow-up with utilities on including External Affairs representatives.	Ongoing	
		Marketing and Outreach	There needs to be a better outreach to target communities to publicize the workforce development programs: There is a disconnect on FEJA, its benefits and programs in some communities.	People for Community Recovery	Facilitation team is considering a Workforce Development Working Group.	Ongoing	A workforce development working group began in 2019 and will be discussing publicizing EE job opportunities to IQ communities
		Workforce Development	Some ideas to replicate: the International Port Authority has a program for re-entry communities (\$180 insurance cards for returning citizens).	People for Community Recovery	This recommendation 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.	Closed	This recommendation was included in the 2019 end-of-year IQ North Memo
		Workforce Development	<b>Ideas for Outreach:</b> We could utilize Transit Ads, Billboards to publicize the programs- since some people are not tech aware or connected via the internet and information is not reaching certain organizations. California Workforce Development Program- local businesses and organizations are required to let IQ people getting public assistance to know about trainings and other opportunities. Potential strategy to reach isolated areas includes partnering with the External Affairs Departments of Utilities, faith-based organizations and perhaps municipalities. CBOs can also assist with engagement and perhaps create a clearing house or portal as a centralized way to communicate. Think more outside of the box in approach to engaging CBOs.	People for Community Recovery	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.	Ongoing	Since 2018, the utilities have innovated their marketing strategies. This is an ongoing effort
		Other	<b>Solar:</b> Give more focus to spreading the word about solar opportunities for communities, there are considerable opportunities in solar. Encourage solar and energy efficiency jobs to be included within online jobs portal to have a diversity of jobs available.	Resource Innovations		Ongoing	A workforce development working group began in 2019 and will be discussing publicizing EE job opportunities to IQ communities
		Workforce Development	<b>Optimizing Programs:</b> Seek out graduates from previous programs to discuss best practices, lessons learned.	Peoples Gas - North Shore Gas		Ongoing	A workforce development working group began in 2019 to discuss this item.
		Workforce Development	Geo-centric implementation- the current implementation is largely Cook County/ Chicago based. It is important to look outside the cook county border for other implementation efforts.	SEEL		Ongoing	A workforce development working group began in 2019 to discuss this item.
		Workforce Development	We need to ensure whether the content of trainings are aligned with the staffing needs of the organizations. There must be alignment around content of training programs.	ComEd		Ongoing	A workforce development working group began in 2019 to discuss this item.

Meeting #3: July 30, 2018	Workforce Development	Workforce Development	Encourage building science into curriculum for trainees, create working groups that create cross-pollination with energy efficiency groups and solar groups. Funnel graduates into weatherization and energy efficiency programs.	Resource Innovations		Ongoing	A workforce development working group began in 2019 to discuss this item.
		Workforce Development	Training locations for workforce development trainees: attention must be paid to having locations where individuals can easily access. Bring training to them may be one solution. This may remove some barriers trainees are facing.	Resource Innovations		Ongoing	A workforce development working group began in 2019 to discuss this item.
		Workforce Development	Engage Navigant and CLEAResult to conduct research and determine best practices on what's happening in other energy driven states.	ComEd	Theo Okiro (facilitation team) is conducting best practices reseach and will inform the IQ North Committee on findings.	Ongoing	A workforce development working group began in 2019 to discuss this item.
		Workforce Development	There may be too big a focus on the training process- maybe focus on job recruitment as well.	SEEL		Ongoing	A workforce development working group began in 2019 to discuss this item.
		Workforce Development	Additional training is needed in programs already being implemented. For instance, there is still a need for utility auditor roles and other roles related to training.	SEEL		Ongoing	A workforce development working group began in 2019 to discuss this item.
		Workforce Development	Having a micro-targeted approach to the screening process will also be helpful.	SEEL		Ongoing	A workforce development working group began in 2019 to discuss this item.
		Workforce Development	Perhaps we can seek out graduates from previous weatherization or workforce development programs- to discuss best practices, lessons learned, what worked and didn't work- this will benefit new students and recent graduates.	Peoples Gas - North Shore Gas		Ongoing	A workforce development working group began in 2019 to discuss this item.
		Workforce Development	Leverage CAAs main role in information sharing aspect to help graduates get through the process.	Peoples Gas - North Shore Gas		Ongoing	A workforce development working group began in 2019 to discuss this item.
		Workforce Development	The great challenge is that there is no standard in definition on if a job has been created. Maybe we can develop consensus on guidelines. For instance, we can look to federal guidelines created for workforce development programs.	Franklin Energy		Ongoing	A workforce development working group began in 2019 to discuss this item.
		Workforce Development	Information is not reaching certain organizations, implementers are not receiving information until it is implemented. There is a disconnect and this can limit implementation	Resource Innovations		Ongoing	A workforce development working group began in 2019 to discuss this item.
		Workforce Development	Several people in the room lost funding to engage with community colleges, maybe that can be reassessed to ensure the success of future workforce development programs.	SEEL		Ongoing	A workforce development working group began in 2019 to discuss this item.
		Workforce Development	Perhaps create a clearing house or portal as a centralized way to communicate about workforce development efforts. This may be a way to receive resumes and trainees. It will help with trade allies and incubator processes. Illinois Utilities Business Diversity Council (IUBDC) has an established network of utiities.	ComEd		Ongoing	A workforce development working group began in 2019 to discuss this item.
Meeting #3: July 30, 2018	Key 2018 Topic: Job Creation and Diversity	Workforce Development	Highlight or expand job fairs because they are good for qualified candidates. Perhaps expand the fairs to include resume writing and other career prepardness skill building.	Peoples Gas - North Shore Gas		Ongoing	A workforce development working group began in 2019 to discuss this item.
		Committee Process	Concerns that decisions are being made right now without the right amount of input. We are still in information gathering stages, this must be paid attention to.	Franklin Energy	Facilitation team is reviewing feedback on the vision / mission / objectives / metrics to update the document. The updated version will be shared at the next IQ North Committee meeting.	Ongoing	The facilitation team is utilizing this recommendatio to optimize the Committee process
		Committee Process	The list feels more like an implementation plan rather than objectives. Perhaps it needs more results-based. Also make each item more actionable	Resource Innovations		Ongoing	The facilitation team is utilizing this recommendatio to optimize the Committee process
		Committee Process	Restructure objectives so that they can be tracked level by level	Resource Innovations		Ongoing	The facilitation team is utilizing this recommendatio to optimize the Committee process
		Committee Process	Ensure agenda is attached to mission/vision tracker to find out what the status of each feedback is	Resource Innovations		Ongoing	The facilitation team is utilizing this recommendatio to optimize the Committee process

Meeting #3: July 30, 2018	Vision, Metrics and Key Priorities	Committee Process	We have not created metrics for milestones.	Slipstream (formerly Seventhwave)		Ongoing	The facilitation team is utilizing this recommendation to optimize the Committee process
		Committee Process	We need more direct input from end-users to be a part of established metrics.	Slipstream (formerly Seventhwave)		Ongoing	The facilitation team is utilizing this recommendation to optimize the Committee process
		Committee Process	Switch wording around for the mission and vision. Start with the vision/goal and then the mission, not the other way around.	Resource Innovations		Ongoing	The facilitation team is utilizing this recommendation to optimize the Committee process
		Committee Process	Track active participation- a task force will help address this. Idea generation should come from communities, then we can track these.	Dupage County CAA		Ongoing	The facilitation team is utilizing this recommendation to optimize the Committee process
		Committee Process	Metrics should include who is developing feedback	Dupage County CAA		Ongoing	The facilitation team is utilizing this recommendation to optimize the Committee process
		Committee Process	We should include the number AND type of organization we would like to see participate.	Dupage County CAA		Ongoing	The facilitation team is utilizing this recommendation to optimize the Committee process
		Committee Process	We should make a distinction between what we want the group to do vs. who this group should be	Community Invest Corporation (CIC)		Ongoing	The facilitation team is utilizing this recommendation to optimize the Committee process
		Committee Process	Challenge implementation contractors on things they can do to put into the program to have deliverables- identify a few things they can re-assess	Resource Innovations		Ongoing	The facilitation team is utilizing this recommendation to optimize the Committee process
		Committee Process	CBOs can tell CAAs and contractors on things they can do more efficiently	Resource Innovations		Ongoing	The facilitation team is utilizing this recommendation to optimize the Committee process
		Committee Process	There is satisfaction that there is a staff person dedicated to each of the metrics	Citizens Utility Board		Ongoing	The facilitation team is utilizing this recommendation to optimize the Committee process
		Committee Process	Tracking quantity is easy, but we need to actively develop and track quality.	Dupage County CAA		Ongoing	The facilitation team is utilizing this recommendation to optimize the Committee process
		Committee Process	Split objectives up into task forces to put into different categories and create more accountability and avenue for concise feedback.	Dupage County CAA		Ongoing	The facilitation team is utilizing this recommendation to optimize the Committee process
		Committee Process	Objectives: Are there interim milestones to include in the objectives? What are we collecting input on? We need to better articulate outcomes and be more concrete on short-term goals.	Franklin Energy		Ongoing	The facilitation team is utilizing this recommendation to optimize the Committee process
		Committee Process	How do we describe active engagement?	Citizens Utility Board		Ongoing	The facilitation team is utilizing this recommendation to optimize the Committee process
Committee Process	How do we measure who we want this group to be?	Community Invest Corporation (CIC)		Ongoing	The facilitation team is utilizing this recommendation to optimize the Committee process		
Meeting #3: July 30, 2018	Additional Discussion: Barriers to Participation	Program Design and Participation	A barrier to participation may be CAA barriers i.e. these agencies can need help with capacity to bring on individuals and train them. It is vital for implementers to consider these barriers prior to program inception.	Resource Innovations	Facilitation team will hold a follow-up call with IACAA to discuss barriers faced by Community Action Agencies.	Ongoing	Opportunities to better support CAAs and address implementation barriers will be discussed in 2020

***IQ North Meeting #2: May 22, 2018***

Meeting Date	Topic	Keyword	Committee Feedback	Organization(s)	Response / Next Steps	Status (Open/Closed/Ongoing)	Follow-Up Notes
		Committee Process	Make sure that actions/changes are implemented and are transparent. Implementing all feedback from the group may be challenging. We need to strategically identify some big wins for all stakeholders and customers and develop a collective plan for implementation.	Elevate Energy		Ongoing	The facilitation team is utilizing this recommendation to optimize the Committee process
		Committee Process	Consider prioritization; we are trying to take on a lot in this space. There are topics that may need to be addressed in the future.	N/A	2 working groups were created in 2019 to better address specific issues. One major topic was tackled at in-person Committee meetings in 2019.	Ongoing	The facilitation team is utilizing this recommendation to optimize the Committee process

Meeting #2: 5/22/18	Committee Process and Structure	Committee Process	Make sure those doing the work in the field have access to the Committee.	N/A		Ongoing	The facilitation team is utilizing this recommendation to optimize the Committee process	
		Committee Process	Concern about this group being too technical, which will decrease CBO participation.	N/A		Ongoing	The facilitation team is utilizing this recommendation to optimize the Committee process	
		Committee Process	There should be accountability and ownership on specific tasks and follow-up from Committee meetings.	N/A		Ongoing	The facilitation team is utilizing this recommendation to optimize the Committee process	
		Committee Process	Proposed Committee Goals - 1) Bridge building; 2) Complete integration (e.g. increased participation and job/career development; and 3) Develop sustainable solutions.	Nicor Gas	Facilitators to request interested Committee participants for a small group discussion of goals/metrics. If you are interested, email Celia (Celia.Johnson@FutEE.biz).	Ongoing	The facilitation team is utilizing this recommendation to optimize the Committee process	
		Committee Process	Make sure there is community member participation. Community organization decision-makers that are actually impacted by the issues.	N/A		Ongoing	The facilitation team is utilizing this recommendation to optimize the Committee process	
		Committee Process	Concern that participants will not feel comfortable speaking up about how they really feel due to the group nature / format.	N/A		Ongoing	The facilitation team is utilizing this recommendation to optimize the Committee process	
		Committee Process	Make sure the Committee's goals / objectives are aligned with what the member organizations have the ability to control / influence.	N/A		Ongoing	The facilitation team is utilizing this recommendation to optimize the Committee process	
Meeting #2: 5/22/18	Key 2018 Topic: Assessing the Wants and Needs of Communities	Program Design and Participation	It is important to ensure that community members accessing services (EE IQ programs) are able to meaningfully participate so changes to the programs are truly based in their needs and perspectives.	N/A		Ongoing	Opportunities to better support IQ Communities and address participation barriers will be discussed in 2020	
		Underserved Populations	The communities and utility customers that could benefit the most from IQ EE programs may be the hardest to reach and will require sustained efforts and budgets from the utilities to continually address their needs.	N/A		Ongoing	This recommendation was included in the 2019 end-of-year IQ North Memo	
		Committee Process	Concern that all the diverse "ethnicities" in communities may not be represented at the meetings. Asian, Latino, Indian-American, etc.	N/A		Ongoing	Outreach to specific communities will continue in 2020	
Meeting #2: 5/22/18	Key 2018 Topic: Marketing and Outreach	Marketing and Outreach	We should track participation geographically, to identify areas with lower program participation.	ERC/UIC	Utilities will come back to present marketing and outreach campaign results at the end of 2018.		This recommendation was included in the 2019 end-of-year IQ North Memo	
		Marketing and Outreach	Concern that community engagement isn't as expansive as it could be - reaching all populations that qualify.					
		Program Design and Participation	Customers on the wait list should understand that additional opportunities are available.	Claretian Associates				Opportunities to better support IQ Communities and address participation barriers will be discussed in 2020
		Marketing and Outreach	Coordinate with festivals, other events to educate people / ensure they are aware that IQ EE programs exist.	Claretian Associates			Ongoing	Since 2018, the utilities have innovated their marketing strategies. This is an ongoing effort
		Committee Process	Try other communication tactics for participants that are not able to participate in-person meetings. Examples: Survey over the phone or by email; schedule one-on-one visits to organizations.	Nicor Gas			Ongoing	One-on-one meetings to CBOs will continue in 2020
		Program Design and Participation	Reach out to past LIHEAP participants about IQ EE programs.	ComED				Opportunities to better support IQ Communities and address participation barriers will be discussed in 2020
		Marketing and Outreach	Additional coordination with local partners would be helpful, such as community events.	N/a	Facilitators will post utility event information on the new IQ Advisory Committee website.		Ongoing	This recommendation was included in the 2019 end-of-year IQ North Memo
		Marketing and Outreach	Create a short fact sheet that lists all IQ programs in Illinois with the "big picture" details on programs, with a phone number for each.	N/A	If there are events that utilities should be aware of/participate in, send to Theo (Theo.Okoro@FutEE.biz) and it will be shared with the IQ North Leadership Team.		Closed	This recommendation was included in the 2019 end-of-year IQ North Memo
		Program Design and Participation	IQ program information should be mobile-friendly and available on a variety of platforms (for example, downloadable by PDF but also easily viewable on a phone).	N/A	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.		Closed	This recommendation was included in the 2019 end-of-year IQ North Memo
		Marketing and Outreach	Think about giving people information that is useful and doesn't "end up on the ground."	Delta Institute	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.		Closed	This recommendation was included in the 2019 end-of-year IQ North Memo
Marketing and Outreach	In reaching out to customers, consider that there are various levels of income qualified.	N/A	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.		Closed	This recommendation was included in the 2019 end-of-year IQ North Memo		



		Marketing and Outreach	Delta Institute has worked on a notification system that could be helpful to share program information.	Delta Institute		Ongoing	This recommendation was included in the 2019 end-of-year IQ North Memo	
Meeting #2: 5/22/18	Marketing and Outreach Tactic: Neighborhood "blitz"	Marketing and Outreach	<p><u>Is it a better structure for "neighborhood blitzes" to be more focused on actual participation vs. program awareness? For example, would knocking on doors to execute energy assessments be effective?</u></p> <ul style="list-style-type: none"> <li>o In the city of Chicago, there are block parties that are coordinated through Aldermen's offices. There could be a connection made with IQ EE programs and block parties.</li> <li>o Canvassing the neighborhood could be an issue because the programs are income qualified. Will everyone be qualified in the neighborhood?</li> <li>o Utility partners should go to local CAAs and see how they operate.</li> <li>o Utilities could reach out to CAAs to ask for x number of houses to participate in a program.</li> <li>o Neighbor-to-neighbor connections are important.</li> <li>o EE program blitzes should be promoted to ensure people in the community know you are coming and understand the program/what is expected/how to participate.</li> <li>o It can be difficult for people to schedule getting EE work done. One challenge – people don't pick up their phone to schedule an assessment when a number calls that they don't recognize. Another challenge – a person without voicemail set up.</li> <li>o Need to break down barriers; think differently about how to reach customers.</li> <li>o Hold customers' hands through each next step.</li> <li>o Hold a joint event "blitz" to 1) sign up participants and 2) get the work done.</li> <li>o Partner with Aldermen's offices. This can help ensure safety for a "boots on the ground" approach. We need community ambassadors that are trusted and known. This can also help ensure that participants understand these programs are being offered by utilities, not alternative suppliers.</li> <li>o Many properties have deferred maintenance; this is an issue that program administrators should be aware of.</li> </ul>	IQ North Committee		<p>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.</p>	Closed	This recommendation was included in the 2019 end-of-year IQ North Memo
Meeting #2: 5/22/18	Key 2018 Topic: Local and Diverse Job Creation	Workforce Development	There should be a focus on counting jobs that are doing actual installs.	Delta Institute	Workforce development will be discussed at Meeting #3.	Ongoing	SAG (NEI working group) is conducting a study to access indirect and direct jobs created due to EE/FEJA	
		Workforce Development	There should be a focus on permanent jobs.	Delta Institute		Ongoing	SAG (NEI working group) is conducting a study to access indirect and direct jobs created due to EE/FEJA	
		Program Design and Participation	There is a benefit to having a top-level approach that is coordinated. We should make this "administrator light" to reduce costs.	Delta Institute		Ongoing	Opportunities to better support Implementation Contractors address implementation barriers will be discussed in 2020	
		Workforce Development	Job training process – ensure there is a roadmap. There needs to be a process flow. For example, make sure there is clear ownership; connection points; contact information that can be shared.	Elevate Energy		Ongoing	A workforce development working group began in 2019 and will be discussing the job training process.	
		Workforce Development	Concern that job training opportunities will not be communicated.	N/A		Ongoing	A workforce development working group began in 2019 and will be discussing publicizing EE job opportunities to IQ communities	
Meeting #2: 5/22/18	Additional Discussion: Barriers to Participation	Other	A barrier to participation may be the administrative aspects of participation. Making a phone call, making an appointment, etc.	IACAA		Ongoing	Opportunities to better support IQ Communities and address participation barriers will be discussed in 2020	
		Other	Expectations of CAA network to ramp up without resources.	IACAA		Ongoing	Opportunities to better support CAAs and address implementation barriers will be discussed in 2020	

IQ North Meeting #1: April 3, 2018							
Meeting Date	Topic	Keyword	Committee Feedback	Organization(s)	Response / Next Steps	Status (Open/Closed/Ongoing)	Follow-Up Notes
Meeting #1: 4/3/18	Committee Process and Structure	Committee Process	We will need to check-in with community-based orgs – do you feel like this is a good use of your time? What could be a better use of your time? Consider changes to the format of the Committee, if necessary.	ComEd	Send out a survey halfway through 2018 requesting feedback.	Closed	
		Committee Process	Interconnectivity is important, specifically holding meetings within communities. Are we planning these meetings in a way that we are addressing topics that community groups are interested in?	Elevate Energy	Send out a survey requesting feedback on meeting locations.	Closed	The July 11 2019 meeting was held at a community space. This item will be a priority of the facilitators.
		Committee Process	Ensure that we have the right stakeholders in the room. Ensure geographic representation across the service territory.	Resource Innovations	Engage utility External Affairs departments; engage job groups. Request feedback from Committee participants about who else should be in the room.	Ongoing	Outreach to diverse CBOs is ongoing,



		Committee Process	Defining goals for the Committee Plan; ensure it is clear what we are working toward.	Community Investment Corporation	Leadership Team to draft Committee goals. Discuss at Meeting #2; request feedback from the Committee	Closed	
		Committee Process	Suggested format for future Committee meetings – offer workshops on specific topics and report back out.	Community Investment Corporation	Facilitators will consider this in developing future meeting agendas.	Ongoing	"Lunch and Learn" activities have been planned for Fall 2019; ongoing
		Committee Process	Everyone participating should have a general understanding of all of the topics, but it may be effective to focus agendas based on where the meetings are held- the needs/wants of those communities. Work with community leaders on agenda.	Elevate Energy	Facilitators will consider this in developing future meeting agendas.	Ongoing	This item has been incorporated into meeting planning. At the July 11, 2019 meeting held at NLEI, NLEI educated the Committee on their programs.
Meeting #1: 4/3/18	Key 2018 Topic: Assessing the Wants and Needs of Communities	Workforce Development	Diverse communities are very underserved, both in accessing programs and in job development.	LVEJO	Job development to be discussed at Meeting #3 July 2018	Ongoing	A workforce development and job diversity working group began in 2018.
Meeting #1: 4/3/18	Key 2018 Topic: Marketing and Outreach	Program Design and Participation	Reduce confusion on programs; reduce barriers to program participation; make it easier to understand applications.	NRDC	Marketing and outreach will be discussed at Meeting #2.	Ongoing	The main topic for 2019 is "addressing hard-to-reach" populations. The purpose is to understand how to remove barriers to participation and reframe EE for IQ populations.
		Marketing and Outreach	Brand the programs to support a uniform message. Collaborate with community-based organizations.	CEDA	This recommendation 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.	Ongoing	This recommendation was included in the 2019 end-of-year IQ North Memo
		Other	Need for streamlining; coordination; an easy to use portal. Community Action Agencies need to be providing this message.	NRDC	This recommendation 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.	Ongoing	This recommendation was included in the 2019 end-of-year IQ North Memo
		Marketing and Outreach	Focus groups - customers should be further engaged to get feedback. Additional focus group research can help utilities learn how to better reach customers.	Resource Innovations	This recommendation 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.	Ongoing	This recommendation was included in the 2019 end-of-year IQ North Memo
		Marketing and Outreach	Test different methods to reach customers.	Resource Innovations	This recommendation 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.	Ongoing	This recommendation was included in the 2019 end-of-year IQ North Memo
		Marketing and Outreach	There is value in co-branding between the utilities and local service providers / local non-profits. For example – a yard sign linking the utility offering the program with a local community group.	ComEd	This recommendation 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.	Ongoing	This recommendation was included in the 2019 end-of-year IQ North Memo
		Marketing and Outreach	Advertising; concern there is too much reliance on bill inserts.	ComEd	This recommendation 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.	Ongoing	The utilities have innovated their marketing strategies to go beyond bill inserts.
		Marketing and Outreach	Challenge – customers have been contacted by Alternate Retail Electric Suppliers and may be skeptical of EE programs. Utility representatives need to be able to explain this to customers. How can utilities regain the trust of customers?	Navigant	This recommendation 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.	Ongoing	"Building trust"- was a focal point topic at the July 11, 2019 meeting. ARES will be discussed in 2020 as the HEAT bill takes effect.
		Marketing and Outreach	Outreach idea: Use door to door "blitzes" to engage customers.	ComEd	This recommendation 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.	Ongoing	In 2019, ComEd selected several neighborhoods for their "blitz" campaigns.
		Marketing and Outreach	It's important for marketing to be done by community groups and by community leaders. Outreach idea--> Utilize employers where income-qualified customers are employed; Community groups; Neighborhood organizations; and Churches.	NRDC	This recommendation 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.	Ongoing	This recommendation was included in the 2019 end-of-year IQ North Memo
		Marketing and Outreach	Need to connect to other initiatives, such as the Robert Woods Foundation.	Resource Innovations	This recommendation 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.	Ongoing	Leveraging other sources of funding for EE programs will be discussed in 2020.
Meeting #1: 4/3/18	Key 2018 Topic: Quarterly Reporting	Other	Additional tracking is needed - such as involvement from NGOs and small businesses and specific regional participation by customers.	LVEJO	Quarterly reports will be presented at Meeting #3; the Committee will have an opportunity to provide feedback on the information reported.	Ongoing	
Meeting #1: 4/3/18	Key 2018 Topic: Local and Diverse Job Creation	Workforce Development	There needs to be conversations about expectations in workforce development. Link organizations with workforce training and those that are hiring. Ensure that people are being trained based on the needs. The job development message should be to support careers rather than jobs. It needs to be easier for people in the community to get these jobs. For example, there will be a shortage of HVAC technicians in the near future. Engage incubators and accelerators – to help small entrepreneurs get involved.	Faith in Place	Workforce development will be discussed at Meeting #3. ComEd will provide an update to the Committee on training.	Ongoing	A workforce development and job diversity working group began in 2018.
		Workforce Development	Make the connection to solar training + solar jobs.	Faith in Place	Leadership Team and facilitators will work on connecting with appropriate solar groups at Meeting #3. IPA is in the process of selecting the program administrators for the IL solar programs referenced in FEJA.	Ongoing	A workforce development and job diversity working group began in 2018.
		Workforce Development	20% of jobs within EE coming from minority and women-owned businesses. We need a better understanding of the current requirements to implement EE programs.	NRDC	Discuss jobs in Meeting #3.	Ongoing	A workforce development and job diversity working group began in 2018.

Meeting #1: 4/3/18	Additional Discussion: Program participation	Program Design and Participation	Eliminate barriers to program participation; improve trust within communities	ComEd	Discuss during marketing and outreach topic (meeting #2).	Ongoing	"Building trust"- was a focal point topic at the July 11, 2019 meeting. CBOs shared recommendations for effectively building trust. ARES will be discussed in 2020 as the HEAT bill takes effect.
		Program Design and Participation	What is offered to single family customers may differ from multi-family customers. For multifamily programs, after the initial direct install, how to further engage those customers should be addressed.	ComEd	Discuss what is offered to both single family and multifamily customers - add to meeting #4.	Ongoing	This will be a discrete topic considered for the program feedback workin group.
		Program Design and Participation	Think about what might disqualify a customer; if they are not eligible, there is something else to offer them?	Resource Innovations	Discuss during marketing and outreach topic (meeting #2).	Ongoing	Opportunities to better support IQ Communities and address participation barriers will be discussed in 2020
Meeting #1: 4/3/18	Additional Discussion: Program suggestions	Energy Efficiency Education	Include the educational component to EE, to ensure participants continue to benefit from a program. Greater education about usage habits is needed. Grassroots education is important. Need to help educate people about technology; the technology needs to be reinforced with education.	ComEd	Discuss incorporating education into EE programs at a future meeting (meeting #4).	Ongoing	This recommendation was included in the 2019 end-of-year IQ North Memo
		Energy Efficiency Education	Energy efficiency isn't a "user friendly" term. Is there another way to talk about it? For example – consider how the federal government promoted the use of FAFSA applications in specific communities. Idea--> Tie spokespeople into getting the word out about EE programs.	ComEd	Discuss incorporating education into EE programs at a future meeting (meeting #4).	Ongoing	This recommendation was included in the 2019 end-of-year IQ North Memo
		Program Design and Participation	Utilities should consider trying new ideas as pilot programs. For example, Altgeld Gardens could be a good location for a future pilot program.	ComEd	ComEd will provide an update on pilot programs from the Call for Ideas (meeting #3, during the quarterly report presentation).	Ongoing	Opportunities to better support IQ Communities and address participation barriers will be discussed in 2020
		Program Design and Participation	Program example: Elevate Energy's 'house party' model; neighbor to neighbor connection is important.	NRDC	This is a type of marketing and outreach. Consider the right way to do this during the meeting #2 discussion.	Ongoing	Opportunities to better support IQ Communities and address participation barriers will be discussed in 2020
Meeting #1: 4/3/18	Additional Discussion: Are there gaps in EE programs?	Program Design and Participation	Disconnection policies of the utilities. There is an interest in making a connection between EE programs and avoiding disconnections.	Disconnection	Discuss disconnection and EE related to marketing and outreach (meeting #2).	Ongoing	ComEd has indicated that they will be accessing opportunities to streamline customer experience in 2020.
		Marketing and Outreach	For research & development, more community engagement is needed.	ComEd	Discuss during marketing and outreach (meeting #2).	Ongoing	This recommendation was included in the 2019 end-of-year IQ North Memo
		Other	EE programs need to be coordinating with solar.	Faith in Place, ComEd and NRDC	Time will be scheduled at an upcoming meeting to discuss solar coordination/opportunities.	Ongoing	Coordination with Solar 4 All will be discussed in the fall of 2019 and onwards.
		Other	Exterior lighting is an unmet need.	ComEd	Discuss exterior lighting at a future meeting (ComEd will present; opportunity for feedback).	Ongoing	
		Other	The need for affordable housing, but subsidized and unsubsidized. For owners, EE can mean lowering their costs.	NRDC	Discuss during meeting #3; utilities to present more information on EE programs for building owners, including ensuring benefits get passed on to the tenants.	Ongoing	
Meeting #1: 4/3/18	Additional Discussion: Barriers to participation	Other	Health and safety needs – how to address these needs of communities and talk to people about this. What can we do? Is there funding that can help with this? Examples of health and safety issues: Safety concerns around light accessibility; mold, asbestos, leaky roofs, indoor air quality, pests. Need to link to health service.	NRDC	Discuss during meeting #3.	Ongoing	This topic is being discussed within SAG (NEI working group)
		Other	Medical bills, energy burden, etc. are higher on the list to disadvantaged communities. Reliability issues – not getting to the point of having your power shut off.	NRDC	Discuss disconnection and EE related to marketing and outreach (meeting #2).	Ongoing	This topic is being discussed within SAG (NEI working group)
		Other	Tenants do not have control over their heating systems.	Resource Innovations	Discuss during meeting #3; utilities to present more information on EE programs for building owners, including ensuring benefits get passed on to the tenants.	Ongoing	