

# **Income Qualified North Advisory Committee Meeting**

Tuesday, March 3, 2020

10:00am – 12:00pm

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

### **Attendees (by-phone)**

#### Facilitators

- Theo Okiro, Facilitator
- Alberto Rincon, Facilitation Team
- Annette Beitel, Facilitation Team
- Tim Melloch, Facilitation Team

#### CBOs/CAAs

- Cheryl Johnson, People for Community Recovery
- Andrew Rains, IACAA
- Ashley Miller, Dupage County
- Jasmine Gunn, Claretian Associates
- Jerry Nellessen, Village of Beach Park
- Lisa Miranda, Rebuilding Together
- Wanda Ramirez, Rebuilding Together
- Lowell Tosch, Community Contacts, Inc.
- Marsha Belcher, CAP Lake County
- Mary Ellen Guest, Chicago Bungalow Association
- Darnell Johnson, Urban Efficiency
- Matias Reyna, The Resurrection Project
- Naomi Davis, Blacks in Green
- Salina Colon, CEDA
- Sharon Lewis, Meadows Eastside Community Resource Organization

#### Utilities

- Brady Bedeker, ComEd
- Catherin Mrase, ComEd
- Chanda Rowan, Nicor Gas
- Chris Vaughn, Nicor Gas
- David Hernandez, ComEd
- Jacob Stoll, ComEd
- Jean Ascoli, ComEd
- Jonathan Skarzynski, Nicor Gas
- Jordan Berman-Cutler, ComEd
- Julie Hollensbe, ComEd

- Karianne McCue, Nicor Gas
- Lalita Kalita, ComEd
- Leanne DeMar, Nicor Gas
- Mark Szczygiel, Nicor Gas
- Melvin Nicks, ComEd
- Omayra Garcia, Peoples Gas-North Shore Gas
- Sandy O'Lear, ComEd
- Christina Pagnusat, Peoples Gas-North Shore Gas
- Tamaira Jackson, Ameren IL
- Dantawn Nicholson, ComEd

#### Implementers / Evaluators

- Amy Jewel, Elevate Energy
- Antonia Ornelas, Elevate Energy
- Ashley Palladino, Resource Innovations
- Brandon Pieczynski, Pangea
- Brian Yeung, Slip Stream
- Pastor Booker Vance, Elevate Energy
- Briana Parker, Elevate Energy
- Bridget Williams, Navigant
- Harsh Thakkar, Franklin Energy
- Jim Heffron, Franklin
- Beatrice Quach, Resource Innovations
- Kristen Pratt-Kalaman, Resource Innovations
- Mary Johnson, Resource Innovations
- Nick Horras, Resource Innovations
- Patricia Plympton, Guidehouse – Navigant
- Yami Newell, Elevate Energy

#### State of IL

- Abigail Miner, IL Attorney General's Office
- Jennifer Morris, ICC
- Lauren Pashayan, IL Attorney General's Office

#### Other Stakeholders

- Jeffrey Hurley, Blue Green Alliance
- Laura Goldberg, NRDC
- Aimee Gendusa-English, Citizens Utility Board
- Samarth Medakkar, MEEA
- Celia Johnson, Celia Johnson Consulting, SAG Facilitator

## **Action Items**

1. **2020 Committee Plan**: The Committee Plan has been circulated to the Committee.
  - a. CBOs and CAAs are asked to send comments/feedback on Committee Plan to [Theo.Okiro@futee.biz](mailto:Theo.Okiro@futee.biz) by COB on Thursday, March 12<sup>th</sup>.
2. **CBO Membership Application and Stipend form**: The Facilitation Team will circulate the CBO/CAA Membership Application & Stipend Form to the Committee in the coming weeks.
3. **Community Events**: The Facilitation Team will work with Peoples Gas- North Shore Gas to circulate information about upcoming community events that PG-NSG will be participating in.

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

- Since the first Committee meeting in May 2018, Committee input and feedback have been recorded in the Committee tracker. In the fall of 2019, the facilitation team consolidated all tracker items into an end-of-year memo.
- At the December 11<sup>th</sup> IQ North meeting, Nicor Gas (Chris Vaughn) presented their response to Tracker items in the 2019 memo.

## **Presentation: ComEd Responses to Tracker Items in 2019 Memo (Jean Ascoli and David Hernandez, ComEd)**

- ComEd's goal is to make sure Committee members understand their feedback has been heard and considered.
- ComEd has pooled resources to deliver comprehensive and streamlined programs. ComEd is also thinking of novel ways to be more mindful about outreach communication style. The Income Eligible team at ComEd is continuing to strengthen community partnerships, share data, and use data to mend gaps in program delivery.
- **How ComEd reaches IQ customers**: ComEd's channels for outreach include: Multi-Family Property owners, Public Housing Authorities, Affordable Housing Developers, Retailers, Educational Institutions, Food Pantries, and several nonprofits, CBOs, and faith-based organizations.
- **How ComEd is organized to serve customers**:
  - On the residential side, ComEd has several Income Eligible (IE) offerings and an Energy Efficiency (EE) Service Provider Incubator.
  - For the Commercial sector: Nonprofit support, rural small business kits, and more. Other IE offerings include instant discounts, affordable housing support, IHWAP, SF/MF retrofits, PHA, IE kits, food bank LED distribution, and Emerging Tech programs focused on Income Eligible improvements.
- **How ComEd is addressing customer feedback**: IE Single Family Retrofits was one of the largest programs in 2019. The team worked with implementers to expand IHWAP SF Retrofits (Resource Innovations, a WMBE is the partner) and Chicago Bungalow Association (a non-profit, is another partner). The Chicago

Bungalow partnership is joint with Peoples Gas- North Shore Gas; the IHWAP channel is joint with Nicor and PG-NSG. In November of 2019, ComEd convened 10 of the state's 15 CAAs to engage in a planning process to that will inform future program expansion through the CAA channel.

- ComEd is now actively engaged with all 15 CAAs through Resource Innovations.
  - Example: ComEd engaged in a renovation of a senior assisted living facility with Kendall Grundy CAA
  - IE Energy Savings Kit: ComEd currently distributes about 50K kits through Green Home Experts (a WMBE) that employs people with disabilities and special needs to build kits
  - In Q4 of 2019, ComEd distributed 47K LED candelabra kits at food pantries
- **Manufactured Homes Retrofits:** With Slipstream as the implementer, ComEd moved the program from Wisconsin-based delivery to using local implementation resources.
- IE Instant Discounts program is working to improve communication/marketing. This program includes in-store demos at select income-eligible retailers
- **Workforce Development:** ComEd EE Diverse Incubator Program provides contractors and distributors with back office support and training, certification attainment assistance, project financing, and addressing other barriers. ComEd will work with Walker Miller in 2020. ComEd participated in a Bronzeville Microgrid Job Fair that convened many EE employers.
- **Emerging Tech Programs:** ComEd is designing programs that acknowledge IQ customer traits (new tech and program design), share data to understand and mend gaps in program delivery (research), and being mindful of communication style and content (outreach).
  - **Design Thinking:** ComEd held an event in the fall of 2019 and invited several CBO and CAA partners to a workshop on design thinking. The goal was to discover new ways of incorporating creative problem solving to address communication style gaps. The ComEd team will provide a read-out of the event to the Committee soon. There will new collateral (marketing materials) coming soon.
    - **Follow-up item:** The facilitation team will coordinate with ComEd to provide a read-out on the design thinking event.
  - The event helped generate lots of ideas for future communication content. Genius Lab, a CBO was also in attendance. Genius Lab took the design thinking approach back to 3 schools and used the methodology to engage those communities.
  - **Question from Matias Reyna, the Resurrection Project:** What programs/technologies are most efficiently, and cost effectively implemented in IQ communities?
    - **ComEd response:** Lots of projects on the affordable housing side look promising: Heat pump technologies are being emphasized. There seems to be less of the comprehensive programs where the

focus is on bringing residents to reasonable level of air sealing, insulation, so other tech is not problematic in terms of cost. Residents are still challenged in understanding some of the newer technologies.

**Presentation: Peoples Gas- North Shore Gas Responses to Tracker Items in 2019**  
**Memo (Omy Garcia, Peoples Gas -North Shore Gas)**

- PG-NSG has smallest service territory of northern utilities: Based in Chicago and 54 North Shore communities.
- PG-NSG's approach has been community-based level partnerships. We have established a grassroots approach to ensure people are comfortable with utilities and utility representation. We've also used mapping tools to target IQ populations.
- PG-NSG is working with CBOs already involved with IQ customer populations: Elevate, RI, CEDA, CAPS of Lake County, CBA, and others. The focus is on in-person interactions and trust building. Handholding and bringing people over to EE table to learn how to save energy costs.
- PG-NSG is Interested in feedback on other partnerships to improve community relationships.
- How PG-NSG is implementing the Committee recommendations:
  - Tailoring marketing strategies: Partnering with aldermen, using local newsletters. People did not initially open mail from utilities but working with community leaders has helped bypass stigma. We also market our programs in hyperlocal newspapers such as the *Lawndale News*.
  - Reframing toward accessible language: Working to revamp to make marketing communication catchier and attentive to multilingual communities. Trying to find words commonly used in specific neighborhoods.
  - Memo Topic #1: Marketing & outreach:
    - Working closely with CEDA, CAP of Lake County on IHWAP, and alderman offices for marketing and outreach opportunities. These are trusted voices that PG-NSG is excited to work with.
    - We are open to partnering with local newspapers and organizations on joint marketing flyers. We are currently looking for people with large community followings.
    - We are also working closely with CAPS – community policing initiative to increase our footprint in North Shore area; but we are also definitely considering resource constraints of CBOs.
  - Memo Topic #2: Addressing Underserved IQ Populations
    - PG-NSG is working on changing the language of marketing materials; reframing energy efficiency programs as appropriate to encourage cost savings and healthier/safer way of living.
    - PG-NSG is also looking for key issues/barriers affecting communities. Helping to do more community events to learn directly. We are working

- on ongoing work to build a one-stop shop that customer can access easily.
  - PG-NSG utilizes highly diverse and local work force and call centers with cultural training to ensure that IQ customers have a positive customer service experience.
- Memo Topic #3: Energy Efficiency Education
  - We are leveraging our diverse workforce and culturally trained customer reps to help with this. We are always open to hearing more ideas on how to better reach IQ communities.
  - We are also reviewing outreach activity gaps to include more community events that may help create more pathways to training/employment.
- In the past, the utilities sent information about upcoming Community Events to the facilitation team for circulation. We suggest continuing this. We want to make sure the Committee and customers are aware of what events Utilities will be present.
  - Follow-up item: The facilitation team will work with the utilities to continue this process.

**Presentation: 2020 IQ North Committee Plan (Theo Okiro, Facilitator)**

- Overview of 2020 Topics:
  - The 2020 focus of the Committee will be garnering feedback on 2022-25 Portfolio Planning Cycle. The planning process will work to solicit new program ideas for consideration.
  - Outreach to CBOs/CAAs will be ongoing. This is to ensure that they are participating in the Committee and providing input into the Planning Cycle.
- Stakeholder Advisory Group (SAG) Coordination:
  - The planning process is coordinated by the SAG.
  - The planning process is a consensus-seeking process to discuss foundational issues to EE plan development including budgets, portfolio objectives, program ideas, and program design. Utilities are required to file their EE plans with Commission for 3/2021 approval
  - There will be joint IQ North/SAG meetings this year.
  - The joint coordination will ensure that feedback from CBOs/CAAs is included in the SAG process.
  - The IQ North Advisory Committee will only be tracking CBO/CAA input and not from SAG stakeholders. SAG stakeholders are welcome to attend IQ North Advisory Committee meetings but their official path for providing input is via the SAG process. The priority for IQ North Advisory meetings is to allow CBOs and CAAs to have a platform for sharing their input and ideas.
  - Note: CBOs and CAAs are eligible to apply for a stipend through membership and reimbursement forms.
- Overview of Working Groups:

- Workforce Development
  - Three meetings: address topics related to workforce and local business development related to IQ communities
- Program Feedback
  - One meeting: to discuss health & safety and funding opportunities for home repairs
- Finalized Meeting Dates:
- Note: Reference the Committee plan and schedule for the IQ North meeting dates
  - **Question from Laura Goldberg, NRDC:** Is April 1<sup>st</sup> the deadline for ALL planning process input?
  - **Response from Jean Ascoli, ComEd:** ComEd suggested that implementation contractors provide recommendations through the SAG process and not offer them a second channel through the IQ Process.
    - Implementation contractors have a deadline of April 1<sup>st</sup> for IQ ideas on the next plan cycle.
    - CBOs/CAAs will be able to provide input by the April 29<sup>th</sup> deadline
    - Will not require CBOs/CAAs to fill out the formal template forms used by the SAG for their April 1<sup>st</sup> deadline. Celia (SAG Facilitator) suggests having a panel discussion at the joint May 13<sup>th</sup> meeting to include IQ input through the SAG.
    - **Comment from Laura, NRDC:** Suggests that CBO/CAA IQ feedback/input should carry the same weight even though they won't be using the formal template to submit ideas.
    - Facilitation Team will work with the SAG Facilitator to create process that ensures CBO/CAA input is adequately considered in the planning process.