

# Ameren Illinois Company Empower Communities Study: Community Leader Interviews

August 2021

## Instrument Information

Table 1 includes key characteristics about the instrument.

Table 1. Overview of Data Collection Activity

Descriptor	This Instrument
Instrument Type	In-depth interviews
Estimated Time to Complete	60-90 minutes
Contact Sought	Community leaders who are familiar with the energy-related needs, challenges, and opportunities of small businesses and community-serving institutions in four target Empower Communities.
Fielding Firm	Opinion Dynamics

## Research Objectives

Opinion Dynamics is conducting research to understand the energy-related needs, common barriers to participating in the Business Program, and effective marketing, education, and outreach (ME&O) strategies for small businesses and community-serving institutions in Empower Communities. Empower Communities are those that have been historically underserved by the AIC Business Program and the Market Development Initiative (MDI). We are focusing on four Empower Communities for this study: (1) Decatur, (2) East St. Louis, (3) Monmouth, and (4) an aggregation of small Southern Rural Communities (including Pulaski County, Anna, and Vienna).

The first stage of the research is to conduct exploratory in-depth interviews with community leaders who are familiar with the businesses and institutions within the target communities and can provide insights into the research topics. We will gather input from a diverse range of leaders, for example, AIC Small Business and Business Energy Advisors (SBEAs and BEAs), AIC Community Relations Coordinators (CRCs), municipal leaders and representatives of local chambers of commerce, MDI partners and Community Action Agencies (CAAs), and other non-profit organizations. The results of the interviews will support the second stage of the research, which is to conduct surveys with small businesses and community-serving institutions (e.g., libraries, community centers, medical clinics, non-profit organizations).

Given the wide range of perspectives we plan to capture, we intend the questions in this instrument to be high-level. Exploratory interviews are loosely structured to allow for the interviewer to adapt the line of questioning based on the specific experiences or expertise of the respondent; and to allow for the flexibility to explore topics or specific issues facing the target communities that we did not anticipate. Table 2 describes the overarching objectives of each section.

Table 2. Research Objectives and Associated Questions

Guide Section	Research Objectives
Respondent Roles and Services in the Community	<ul style="list-style-type: none"> <li>▪ Collect key information about the respondent to aid in framing questions or including/excluding certain interview topics</li> <li>▪ Understand the respondent’s role and the mission of their organization or their specific role within a larger organization (e.g., as an AIC BEA or as a municipal leader in a certain department)</li> <li>▪ Understand what services they or their organization provide to small businesses and institutions</li> <li>▪ Determine if they often engage in marketing, education and outreach efforts to small businesses and institutions</li> </ul>
Community Overview	<ul style="list-style-type: none"> <li>▪ Understand the characteristics of the community, such as key socio-economic challenges, demographics, languages spoken, and what makes it unique compared to other surrounding communities or regions of Illinois.</li> <li>▪ Identify key businesses or business areas; and any particularly large employers for small towns or rural communities</li> <li>▪ Understand access to basic goods and services, as well as common commuter and business traffic patterns (e.g., travel in or out of the area to get services)</li> <li>▪ Identify key community serving institutions and, for smaller communities, any lack of basic (e.g., medical, educational, social service) institutions</li> </ul>
Challenges for Businesses and Institutions	<ul style="list-style-type: none"> <li>▪ Develop a broad understanding of key threats or challenges faced by local businesses and institutions</li> <li>▪ Identify COVID-19 specific business and institution challenges in the community</li> <li>▪ Identify specific small businesses/institutions or business/institution types most in need of support within the community, and the associated risk of losing those businesses or institutions (e.g., reduced access to essential services)</li> </ul>
Investment Needs and Sources of Support	<ul style="list-style-type: none"> <li>▪ Understand investment priorities for small businesses and institutions in the community and where energy management ranks among those priorities</li> <li>▪ Identifying trusted sources of information within the community, energy-related or otherwise</li> <li>▪ Determine where small businesses and institutions often look for financial or operational support.</li> <li>▪ Understand any lack of specific types of support services, or ways small businesses and institutions could be better supported in general.</li> </ul>
Barriers to Energy Management and Participation in AIC Offerings	<ul style="list-style-type: none"> <li>▪ Assess community awareness of energy savings opportunities, including AIC offerings</li> <li>▪ Determine barriers faced by local businesses and institutions in participating in both general energy management opportunities and AIC-specific offerings; and how those barriers could be resolved</li> <li>▪ Assess community-specific perceptions of AIC energy savings offerings</li> </ul>
Engagement Strategies	<ul style="list-style-type: none"> <li>▪ Assess what ME&amp;O efforts to small businesses and institutions have been historically successful within the community, energy-related or otherwise; gather lessons learned about drivers of success</li> <li>▪ Identify opportunities to improve engagement strategies within the community in terms of messaging, messengers, and tactics/events</li> <li>▪ Identify ways in which AIC can maintain a positive impression/reputation within the community</li> </ul>
Closing	<ul style="list-style-type: none"> <li>▪ Collect any remaining thoughts related to the discussion</li> <li>▪ Identify potential additional respondents and request assistance reaching out to them</li> </ul>

## Recruitment Strategy

We seek to conduct at least five interviews with leaders within each community; and at least 20 leader interviews in total. We will use a “snowball” recruitment strategy, where we will begin with four group discussions (one per community) with the AIC SBEAs, BEAs, and/or CRCs that serve each community and then seek their assistance with identifying and recruiting additional community leaders for individual interviews. . For instance, some BEAs and CRCs have strong relationships with the local governments within the target communities, and we may leverage those connections to recruit municipal leaders for interviews. Further, we will ask the Income Qualified South Advisory Committee, which includes many community-based organizations (CBOs) and CAAs, to help identify and recruit respondents; or some may volunteer themselves as respondents.

## Instrument

### Introduction

Thank you again for taking the time to speak with me today about [COMMUNITY]. The ultimate goal of our conversation today will be to help Ameren Illinois further invest in your community by learning more about how to best support small businesses and community-serving institutions in [COMMUNITY]. Examples of institutions include, but are not limited to, local government-run institutions like libraries, schools, shelters, and community centers; faith-based organizations, like churches; or non-government organizations that provide critical services, like hospitals, clinics, or other non-profits. We would like to ask you questions about how small businesses and institutions in [COMMUNITY] think about energy savings, the main barriers they face with improving energy management, and identify opportunities for AIC to reach and support businesses and institutions through their energy efficiency offerings. While our research focuses on finding ways to help Ameren Illinois’ customers improve energy management and reduce their utility bills, we’re reaching out to community leaders like yourself because we want to develop a holistic understanding of the small businesses and community-serving institutions in your community, and we feel that you can contribute to our effort to paint a full picture of the community and its needs as a whole.

*Ask permission of interviewee to record interviews.*

### Respondent Roles and Services in the Community

- Q1. To begin, could you please confirm that you are [ROLE] operating in [COMMUNITY]? How long have you been in that role?
- Q2. Can you please tell me a bit more about your role at [COMPANY/ORGANIZATION]? What services or support do you provide to small businesses and institutions in [COMMUNITY]? [IF NEEDED/RELEVANT: Are you currently or have you previously partnered with Ameren Illinois through the Market Development Initiative?]
- Q3. How would you describe the goals of your [ROLE/ORGANIZATION]? What types of clients/community members do you serve? [Get specific details such whether they serve certain types of businesses or institutions, certain parts of the community, or certain socio-economic or ethnic groups, etc.].

- Q4. Does your role involve frequent outreach to small businesses and institutions? What does this entail? What types of events or community activities does your organization sponsor or attend, if any?

## Community Overview

Next, we'd like to learn more about the community in general.

- Q5. In general, what words come to mind when you think of the [COMMUNITY] community? [PROBE: what characterizes this community, what is most important to residents of this community, "who" is this community?]
- Q5A. What do you think makes this community unique compared to other parts of Illinois or surrounding areas?
- Q6. What are the most important socio-economic challenges [COMMUNITY] faces? [PROBE: economic hardship, social challenges like racism or xenophobia, access to education or other institutions, specific historical challenges that affect the present day]
- Q7. How would you characterize ethnic or cultural diversity in [COMMUNITY]?
- Q8. Are there commonly spoken languages in [COMMUNITY] other than English; if so, what languages? Are there specific areas within the community where there is a higher density of people with limited English proficiency? Are there areas where businesses and institutions specifically cater to non-English-speaking customers?
- Q9. How would you describe political leanings in [COMMUNITY]? [IF NEEDED: very conservative, very liberal, or mixed]
- Q10. What religious groups are most prevalent in [COMMUNITY]?
- Q11. Are there other types of minority social groups with a larger than usual presence in the community, such as veterans, LGBTQ+ people, undocumented immigrants, or returning citizens (i.e., formerly incarcerated people)? Are there many businesses owned or operated by these groups?

Now let's talk specifically about the business community in [COMMUNITY].

- Q12. What are some of the most prevalent or highly trafficked business areas that come to mind in [COMMUNITY]? [PROBE: neighborhoods or parts of town; a particular highways or business strips; none at all in smaller towns]
- Q13. [FOR MONMOUTH OR RURAL COMMUNITIES: Are there any specific large businesses or institutions in the area that are major employment sources for [COMMUNITY]?
- Q14. Are there basic goods or services that [COMMUNITY] lacks locally?
- Q15. Do people from the community frequently travel to or from other regions/communities in Illinois to receive specific goods or services? For example, do a lot of people do their grocery shopping or other

errands in towns or cities outside of [COMMUNITY]; or do they come to this [COMMUNITY]? If so, where do they go or where do they come from? Does this cause challenges or opportunities for local businesses?

- Q16. Do community members commonly travel to/from other regions/communities for work? What regions/communities are they traveling to/from for work? Does this cause challenges for local businesses?

Now let's shift focus to community-serving institutions or organizations in [COMMUNITY].

- Q17. In general, where do people in [COMMUNITY] go for support? [IF NEEDED: In other words, where do they go to receive social services in times of need, such as financial hardship, childcare support, or food insecurity?]
- Q17A. What are some of the most prevalent non-profits or other community-serving organizations that come to mind in [COMMUNITY]? What are the services and targeted populations/demographics for these organizations?
- Q17B. How many K-12 schools are in the community? Are there many pre-schools or childcare providers? What about other types of educational or recreational institutions, like libraries or community centers?
- Q17C. [FOR MONMOUTH OR RURAL COMMUNITIES: Are there local medical or health resources in the community, such as hospitals or smaller medical centers? [IF NONE/FEW: Where would residents go in a medical emergency?]
- Q17D. [FOR MONMOUTH OR RURAL COMMUNITIES: Are there other types of local social support services, such as homeless shelters, women's' shelters, food banks, or soup kitchens?

## Challenges for Businesses and Institutions

- Q18. What would you say are the three biggest community-specific threats or challenges to small businesses in [COMMUNITY]? In other words, what are some of the challenges they commonly face in their day-to-day operations? What kinds of businesses struggle the most, if any?
- Q19. What unique challenges, if any, do not-for-profit institutions like churches, schools, libraries, or community centers face compared to small businesses in your community? Which ones struggle the most, if any?
- Q20. What are some unique challenges that small businesses and institutions face associated with being in a [densely populated/rural] area compared to [rural/densely populated] regions? [IF NEEDED: For example, does the community have a higher cost of living, more business competition, more crime?]
- Q21. What impact did the COVID-19 pandemic have on the businesses and institutions in your community? Do these challenges persist today?

## Investment Needs and Sources of Support

- Q22. What are the three most common investment priorities that you observe amongst small businesses and institutions in [COMMUNITY]? [IF NEEDED: If they had the money, what are the investments they would likely make first?] [Examples: promotions, aesthetic improvements (e.g., improved signage or appearance), equipment or facility upgrades, safety/security, hiring new staff or increasing employee compensation] [PROBE FOR DIFFERENCES BETWEEN BUSINESSES AND INSTITUTIONS]
- Q22A. Compared to other priorities, would you say that energy management or lowering energy bills is a high, medium, or low priority?
- Q23. [IF LOW PRIORITY/NOT A PRIORITY] What do you think causes small businesses or institutions to de-prioritize energy management or lowering energy bills?
- Q24. In general, where do small businesses/institutions in [COMMUNITY] often look for support when they are facing financial challenges or issues with their operations [PROBE: financial hardship, inability or difficulty hiring, deciding on investments, managing costs, etc.]? In other words, what B2B businesses (if needed: like contractors, tax preparers, or legal service providers), government organizations, or non-profits do they often rely on for support?
- Q25. In what ways could small businesses or institutions in your communities be better supported in general? What support services do they lack, if any?

## Barriers to Energy Management and Participation in AIC Offerings [Ask only AIC Partners]

- Q26. What do you think are the most common barriers small businesses and institutions face in reducing energy costs or making energy-saving investments?
- Q26A. How knowledgeable do you think small businesses and institutions are about ways to manage their energy costs or potential energy-savings investments?
- Q26B. How often do small businesses and institutions have total control over decisions to make significant equipment or structural changes to their property, versus needing to get approval from other parties, like a landlord, funders/donors, or the local government? How often do business owners/institution administrators understand how to discuss this with their landlord, funders/donors, or the local government?
- Q27. Do small businesses and institutions in your community demonstrate awareness of AIC Business offerings?
- Q27A. What are the most common perceptions of AIC energy efficiency offerings among the small businesses and institutions in your community? Are they skeptical about the offerings?

- Q27B. Do you think the businesses and institutions in your community would be interested in participating in Ameren Illinois' energy efficiency offerings? [IF NEEDED: rebates or discounts on lighting, heating and cooling equipment, ventilation; building shell improvements; incentives for custom projects, etc.] What do you think encourages or discourages them to be interested in Ameren's energy efficiency offerings?
- Q28. What benefits, if any, do businesses/institutions perceive toward going green/investing in clean energy in your community? Do attractive benefits exist beyond bill savings/financial incentives?
- Q29. How could some of the barriers we've discussed potentially be resolved?

## Engagement Strategies

Thank you again for taking the time to provide this helpful information. Our last topic is about strategies for reaching out to small businesses and institutions in [COMMUNITY].

- Q30. What do you think would be the best ways to engage or market to businesses and institutions in [COMMUNITY]? [PROBE: languages, messaging/word choice, credible messengers, specific types of events or outreach tactics]
- Q30A. What messaging or communication styles resonate with businesses and institutions in [COMMUNITY]? In other words, for any kind of outreach campaign, when you think of popular brands or recent efforts to "get the word out" within your community, what comes to mind as particularly successful?
- Q30B. Generally speaking, what group(s) or organization(s) would you say community members find most trustworthy for information about issues, products, or services within your community? What groups or organizations do you think they find least trustworthy? Would you say businesses or institutions think Ameren is a trustworthy source of information?
- Q30C. Can you think of events in your community where information or materials about energy management could be distributed and would be well-received by businesses and institutions? Have you/your organization planned or attended these events?
- Q31. When you think about brands, advertising campaigns, or educational outreach efforts targeted toward businesses and institutions in general, what comes to mind? Were they successful or unsuccessful? What reasons do you attribute to that success/lack of success?
- Q31A. [ASK IF AIC PARTNER] What Ameren messaging or engagement strategies, if any, have been particularly successful or unsuccessful in [COMMUNITY]? What reasons do you attribute to that success/lack of success? In other words, how do you typically position the Business Programs in order to effectively engage community members?
- Q31B. [IF ORG DOES THEIR OWN CAMPAIGNS OR OUTREACH] What messaging or engagement strategies has your organization implemented that has been particularly successful or unsuccessful in [COMMUNITY]? What reasons do you attribute to that success/lack of success?

- Q32. What outreach strategies do you suggest that Ameren Illinois could use to best engage with businesses and institutions about energy management specifically? How do or would you position or introduce the concept of energy management to a business or institutions that has never heard or rarely thinks about energy management [PROBE: for example, what words do you use, what benefits do you mention]?
- Q33. What other advice would you offer to Ameren Illinois in improving their ability to reach small businesses and institutions and make a positive impression in the [COMMUNITY] community?

## Closing

- Q34. Who else in your community do you think might be a good resource for us to speak with about our research? Think of people who are considered leaders in the community and could speak to the needs of the community or potentially effective marketing and outreach strategies, such as a local government leader, chamber of commerce, community centers, or non-profit organizations.
- Q34A. Would you be willing to put us in contact with that person/those people? Do you have contact information that you could share with my team?
- Q35. [IF MDI PARTNER] In the future, would you or someone else at your organization be willing to speak with another member of my team about your experience as an Ameren Illinois MDI Partner? [IF NEEDED: Our research team is also conducting conversations with MDI Partners to collect feedback on your experience, including understanding roles and responsibilities among partners, identifying key successes and challenges, and determining whether opportunities exist for AIC to provide you with further support.]
- Q36. I think those are all the questions I had for you today. Do you have any additional thoughts you would like to share with us that you think would be helpful for our research?
- Q37. Should we have any additional questions, would it be okay if we reached out to you for follow up?

*Thank you very much for your time – we appreciate it!*