Illinois EE Stakeholder Advisory Group
Q1 Large Group Meeting

Wednesday, March 22, 2023
9:30 am – 12:00 pm
Teleconference

Attendees and Meeting Notes

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Meeting Materials

Meeting materials are posted on the March 22 meeting page:
- March 22, 2023 SAG Q1 Meeting Agenda
- SAG Facilitator Presentation: Introduction to Meeting
- ACEEE's Leading with Equity Initiative Presentation: Lessons Learned in Advancing and Measuring Energy Equity
- University of Michigan Energy Equity Project Presentation: Using metrics to Achieve Energy Affordability

Additional information about the special guest presentations from ACEEE and the University of Michigan Energy Equity Project:

ACEEE Leading with Equity Initiative
- Initiative Website: https://www.aceee.org/energy-equity-initiative
- ACEEE Energy Equity Webpage: https://www.aceee.org/topic/energy-equity
- December 2021 Report: ACEEE's Leading with Equity Initiative: Key Findings and Next Steps

University of Michigan Energy Equity Project
- Project Website: https://energyequityproject.com/
- August 2022 Report: "Energy Equity Framework: Combining data and qualitative approaches to ensure equity in the energy transition." University of Michigan – School for Environment and Sustainability (SEAS).

Attendees (by webinar)

Celia Johnson, SAG Facilitator
Caty Lamadrid, Inova Energy Group (SAG Meeting Support)

AJ Young, U.S. Greenlink
Al Walker, Windsor Park Lutheran Church
Alan Elliott, Opinion Dynamics
Amanda Dewey, ACEEE
Andrey Gribovich, DNV
Andy Vaughn, Leidos
Annette Beitel, Future Energy Enterprises (IQ Committee Sr. Facilitator)
Billy Davis, Bronzeville Community Development Partnership
Briana Moore, Will County Land Use Dept.
Bridget Williams, Guidehouse
Brittany Davis, VEIC (IL-TRM Administrator)
Cassidy Kraimer, Community Investment Corp.
Cher Seruto, Guidehouse
Cheryl Johnson, People for Community Recovery
Cheryl Watson, Equitable Resilience & Sustainability LLC
Chris Vaughn, Nicor Gas
Dan Moring, Slipstream
David Brightwell, ICC Staff
Deb Perry, Ameren Illinois
Deondre' Rutues, Future Energy Enterprises
Devin Day, SEDAC
Diana Fuller, Walker-Miller Energy Services
Elizabeth Horne, ICC Staff
Erika Dominick, Walker-Miller Energy Services
Eve Pytel, Franklin Energy
Gabriel Nagy, ComEd
Gregory Norris, Aces 4 Youth
Haley Keegan, Resource Innovations
Hannah Howard, Opinion Dynamics
Jared Policicchio, City of Chicago
Jarred Nordhus, Peoples Gas & North Shore Gas
Jason Lastella, Franklin Energy
Jason Fegley, Ameren Illinois
Jason Kosowski, Illinois EPA
Jen Valadez, Resource Innovations
Jim Dillon, Anura Energy
John Carroll, Ameren Illinois
Julia Friedman, Oracle
Julie Hollensbe, ComEd
Justin Schott, University of Michigan
Kalee Whitehouse, VEIC (IL-TRM Administrator)
Karen Lusson, National Consumer Law Center (NCLC)
Kari Ross, NRDC
Kate Shonk, Citizens Utility Board
Katherine Elmore, Community Investment Corp.
Lance Escue, Ameren Illinois
Larry Kotewa, Elevate
LaShelle Newland, Resource Innovations
Laura Agapay-Read, Guidehouse
Laura Goldberg, NRDC
Laura Manthe, Slipstream

Lawrence Kotewa, Elevate
Leanne Jossund, ComEd
LaJuana Garret, Nicor Gas
Marissa Strassel, Muse Community Design (IQ TRM Working Group Facilitator)
Mary Ellen Guest, Chicago Bungalow Association
Mary Johnson, Resource Innovations
Matt Armstrong, Ameren Illinois
Megan Anderson, Resource Innovations
Mia Berrios, People for Community Recovery
Michael Brandt, Elevate
Molly Lunn, ComEd
Monique Leonard, Ameren Illinois
Nick Warnecke, Ameren Illinois
Nicole Popejoy, IL Association of Community Action Agencies
Omy Garcia, Peoples Gas & North Shore Gas
Patrice Suggs McFarlin, SEEL
Philip Halliburton, ComEd
Randy Gunn, Mondre Energy
Rebecca McNish, ComEd
Ron Markus, BCMW Community Services
Ronna Abshure, ICC
Ryan Kroll, Driftless Energy
Sam Dent, VEIC (IL-TRM Administrator)
Sarah Moskowitz, Citizens Utility Board
Scott Eckel, ICC
Stacey Paradis, MEEA
Stephen Robinson, Northwest Austin Council
Sy Lewis, Meadows Eastside Community Resource Org.
Tamika Cole, Walker-Miller Energy Services
Ted Weaver, First Tracks Consulting, representing Nicor Gas
Theresa Collins, Senior Services Plus
Tim Dickison, Ameren Illinois
Tina Grebner, Ameren Illinois
Victoria Nielsen, Applied Energy Group
Zach Ross, Opinion Dynamics

Opening & Introductions
Celia Johnson, SAG Facilitator

Purpose of the Q1 SAG Meeting: To educate SAG and IQ EE Committee participants on the [ACEEE Leading with Equity Initiative](#) and [University of Michigan Energy Equity Project](#), including understanding considerations for Illinois energy efficiency portfolios.

Materials: [SAG Facilitator Presentation: Introduction to Meeting](#)
- Today's discussion relates to energy equity.
- All four SAG Equity Subcommittee meetings for 2023 will be held jointly with the Income Qualified Energy Efficiency Committee (IQ EE Committee), where future discussions related to energy equity will be held. SAG Equity Subcommittee meetings provide an opportunity for SAG and IQ Committee participants to coordinate on discussion of energy efficiency efforts related to equity.

- Introduction of two guest presenters.
  - Dr. Amanda Dewey is a Research Manager for ACEEE. Her presentation focuses on the ACEEE Leading with Equity Initiative.
  - Justin Schott is a Project Manager for University of Michigan Energy Equity Project, School for Environment and Sustainability.
- Background on purpose of today's presentations:
  - SAG Policy Manual Subcommittee is at the end of year-long process to update Policy Manual Version 3.0
  - Policy proposals were submitted in June 2022 – the Subcommittee plans to file the updated Manual with the Illinois Commerce Commission for approval this summer
  - One of stakeholder policy proposals suggests the adoption of statewide, consistent equity and affordability reporting metrics for Illinois utilities
  - This policy is currently under discussion by the Subcommittee, focusing on equity and affordability policy principles
  - After the policy is finalized, a separate group of the SAG will work on equity and affordability metrics in 2023, that follow these principles
  - Finalizing the policy + finalizing metrics will be coordinated with the IQ Committee for input
  - Today's meeting is an opportunity to educate the larger SAG and IQ Committee about two energy equity research initiatives, to help inform the future metrics discussion
  - One proposal suggested the adoption of statewide, consistent, equity and affordability reporting principles. This is currently under discussion.
  - After policy is finalized, then a separate SAG group will work on equity and affordability metrics that follow these reporting principles.

ACEEE Leading with Equity Initiative
Dr. Amanda Dewey, ACEEE

Purpose: To educate participants about the ACEEE Leading with Equity Initiative.

Materials: ACEEE's Leading with Equity Initiative Presentation: Lessons Learned in Advancing and Measuring Energy Equity
- In recent years ACEEE has specifically changed its mission to recognize and focus on energy equity and disadvantaged communities.
- Slide 4 – Two frameworks are used at ACEEE for energy equity. The first framework covers four dimensions of Equitable Energy Systems: Structural, procedural, Distributional, and Transgenerational. Distributional equity is what most people think about when they think of equity.
- Slide 5 – Second framework. ACEEE defines an Equitable Energy Systems through six indicators. To be successful, we believe all indicators need to advance.
- Slide 6 – Concrete examples of what energy equity looks like.
  - ACEEE defines high energy burden as 6% of income spend in energy.
  - For IL, median energy burden for all households is 3.6%, but for median low-income the burden is 9.1%
  - In Chicago specifically there are big disparities by race. There are similar patterns around the country.
- Slide 8 – ACEEE publishes scorecards evaluating efforts of states, utilities, and cities. Benchmarking allows us to identify leaders and provide examples of best practices.

- Slide 9 – Utility Scorecard: latest is from 2020 with update coming this summer. Ameren and ComEd are included.
- Slide 10 – State Scorecard came out December 2022, Illinois was ranked 16th.
- Slide 11 – in recent years ACEEE was getting feedback that some states and utilities recognized as leaders were not taking equitable approaches to their work. This led to the start of the Leading with Equity Initiative, with the goal of incorporating equity-focused metrics into ACEEE's scorecards.
- Slide 12 – starting in 2021 there was an effort to identify how to bring equity into scorecards. The process started with workshops to bring community-based organizations (CBOs) into discussions. The year ended with a list of 12 most important actions that ACEEE should be evaluating governments and utilities on for their scorecard metrics.
- Slide 13 – during year 2 of the initiative ACEEE started implementing these 12 actions and determining how to get metrics and information needed. Meanwhile, CBOs are getting engaged for ACEEE to keep learning from them.
- Slide 14 – Key findings of Energy Equity Metrics
  - Importance of changing definition of success for energy efficiency programs to a more holistic view. We need to look beyond kWh saved.
  - Importance of data. Stakeholders have mentioned to ACEEE that sometimes it is hard to have information needed to make decisions. More demographic data (and other types of data) is needed. Data comes from multiple parties, and everyone needs to work together to share information.
  - Equitable representation in decision-making process. Who is at the table influences the decisions made.
  - Importance of setting and communicating clear goals and definitions.
  - Transparency and accountability are requisites for success.
- Slide 15 – These are the 12 key actions that came out of year 1 of the initiative. They range across different dimensions of equity.
- Slide 16 and 17 – Shows what the new scorecards will look like once these equity metrics are included, and how points were added.
- Slide 18 – List equity metrics that were included in 2022 State Scorecard.
- Slide 19 – List equity metrics that were included in 2023 Utility Scorecard.

Karen Lusson NCLC – via chat: Can you elaborate on your interest in access to energy efficiency financing? (There are some concerns on that one.)
  - *Amanda Dewey: I cannot elaborate much because this is being released in July. In the full draft we share what we felt was important for a utility to earn credit on a point.*
  - *Karen Lusson: At a high-level access to financing sounds good, but from the ground up, since these customers do not have discretionary income for financing, we need to see what options should be available to customers and how you market it. At NCLC we are concerned with PACE.*
  - *Amanda Dewey: We've asked stakeholders about this because we wanted to make sure that predatory lending/financing practices are not included in the metrics. To be transparent, I don't expect our metrics will be perfect this time around since it is the first time they've been presented, we'll tweak and improve. But we agree that ACEEE needs to give credit for positively impactful metrics and not hurtful practices. This is still in draft and taking feedback for next two months if anyone wants to comment.*

Karen Lusson – via chat: Is there a specific metric to determine whether disconnections have disproportionately impacted certain communities in the scorecard?

- o *Amanda Dewey: we try to give credit to states that have an approach identified. We are not prescribing said approach, but we are scoring whether states/utilities are doing something to measure distribution of those at risk of shut-offs. Then ACEEE sets parameters for how additional points are added. For example, tracking may not be enough and we want to ensure that actions are being taken.*

Annette Beitel – via chat: Do any of the metrics measure historical inequity and advance reparations?

- o *Amanda Dewey: In general, ACEEE does not prescribes action. We consider the guiding principle and then states can identify what metrics apply to them.*
- o *Annette Beitel: I'd like to recommend that maybe you add "historical equity" because as I understand it "transgenerational equity" is future-looking, but there is also a historic disinvestment and inequity (past-looking). We should understand and elevate this concept and think about how it can be remedied.*

Amanda Dewey: on slide 4, we consider this within "Structural pillar." One challenge we've had is that because we are scoring on action, it is difficult to measure what a state should be doing on structural/history equity to earn points. We recognize these dynamics should not always be a checkbox. It is not always about symptoms, but we focus on root causes and solving them.

Justin Schott – via chat: This is the best resource I know of for quantifying historical disparities in energy efficiency investments and savings, but it only looks at low-income vs non-low-income, not race, etc.
ihttps://poverty.umich.edu/files/2021/03/Energy_efficiency.pdf"

Laura Goldberg – via chat: Another framework for racial equity dimensions from urban institute - the state of equity measurement -
https://www.urban.org/sites/default/files/publication/101052/the_state_of_equity_measurement_0_0.pdf

Gregory Norris: Are there templates that ACEEE uses on how to work with local governments?

- o *Amanda Dewey: ACEEE has a few websites that give examples, but nothing like a template. This is a good idea and an example of how we want to use feedback to improve.*

Annette Beitel: Do any of the metrics consider the idea of energy as an essential service? For instance, for elderly customers or those with disabilities or a medical condition they cannot have the service disconnected. In IL there are policies around certain times of year.

- o *Amanda Dewey: There is thought given to this in current editions, but there are no metrics associated with it. Slide 19 shows utility scorecard metrics. We have the goal of measuring how to reduce shut-offs. How do we give points? Which level is right to measure? These are questions that we are asking as an organization.*

Karen Lusson – via chat: In terms of disconnections, for example, in Illinois, we have a statute that applies to electric and gas utilities that requires the companies to

demonstrate issuance of late fees, disconnection notices and disconnections as evidence that they have acted to keep bad debt at "reasonable" levels. That's a punitive approach to revenue collection that ignores the issues your slides appropriately reference -- historically racist policies in housing, credit access, mortgage access, disinvestment and the resulting racial wealth gap. The incentive to the utilities should be flipped: how, utility, have you helped connect people to energy assistance? How have you reduced disconnections in the top zip codes with the highest disconnection rates? Have you offered bill payment assistance? Have you offered shareholder dollars for bill payment assistance? Have you promoted and connected folks to low-income energy assistance programs/weatherization? Does the utility offer arrearage management programs that offer 1/12th of the arrearage to be wiped out for every (discounted) monthly payment -- similar to Illinois' existing PIPP program.

- Slide 20 – As ACEEE implements these changes we want to continue to elevate the expertise of CBOs. We have brought stakeholders together to get their input.
- Slide 22-24 – Recently ACEEE published some of the recommendations from CBOs for government, utilities, and regulators. Highlights:
  - Track and state non-energy benefits of initiatives.
  - Monitor distribution of costs and benefits across groups
  - Embed processes of accountability
  - Emphasize auto-enrollments
  - Emphasize H&S barriers
  - Multifamily properties as a focused effort (and separate from single-family)
  - Reduce the possibility of neighborhood displacement due to energy efficiency upgrades. We have some tools
  - Separate moderate and low income

Laura Goldberg – via chat: Do you have a list of participants, especially of the community-based organizations, that were a part of these recommendations? So we can better understand the specifics and types of groups involved?

Amanda Dewey: Every year we publish a white paper of activities we did that year and who was engaged. In about 10 days we will post 2022 memo.
- *Link to 2021 memo: https://www.aceee.org/white-paper/2021/12/aceees-leading-equity-initiative*
- *People can also sign up for notifications via email: https://survey.alchemer.com/s3/6168745/ACEEE-LWE-Interest-Form*

- Slide 25 – updating scorecards is ongoing, but we are also focused on creating resources that are helpful to CBOs.
- Slide 26 – Key takeaways:
  - Center voices of CBOs and underserved communities
  - Prioritize accountability and transparency
  - Use accurate information about context and community needs
  - Ensure staff has the resources to advance equitable process. This should be fully baked into organizational culture.
  - Develop and clearly state definitions and targets for goals.

Celia Johnson: Thank you for the takeaways, these guidelines will help SAG on next steps as we discuss reporting principles and metrics.

Annette Beitel – via chat: Has there been discussion of metrics relating to outcomes? In other words, how many low-income customers receive weatherization, all bill assistance for which they are eligible? Reduced disconnections over time?

For the IL Weatherization Assistance Program (IWAP) often the eligibility and application period will open and shut a few weeks later because funds are already committed. And there are many customers that are on this list year after year because they don't meet the criteria required. Similarly for Low Income Home Energy Assistance Program (LIHEAP) we often can only serve 15-23% of customers. But there are states that seek to serve 100% of customers, CA for example has established a statutory goal. I would love to have a "competition" between states where this is tracked. It is not just about tracking results, but can we look at the numbers and use them as a benchmark.
- o *Amanda Dewey: This is included in state and utility scorecard in current editions. We give points if state tracks program impacts in an equity-focused way.*

Slide 21:
- First, we try not to just measure on a policy but also the outcome.
- You can't just have a goal, but it should be an ambitious goal.

Laura Goldberg – via chat: Given the first recommendation on centering community voices - would love to figure out how we can ensure that in IL and bring these presentations more directly to IL CBO groups and partners. And ensure that next steps ground and center community, frontline groups.

Karen Lusson – via chat: Question for Amanda related to percentage of budget that goes to low income energy efficiency programs..." one comment we hear from utilities during negotiations in terms of trying to increase $ budget that goes to low income weatherization (LI Wx) is that they bump up against statutory required EE targets, we have a situation where there might be huge budgets but even if utilities wanted to devote to LI programs they are constrained by traying to hit their annual statutory goals. One thing I want ACEEE to think about, are the ambitious overall EE saving goals constraining the ability to offer more LI programs which we know are expensive. And should there be statutory revisions that say "notwithstanding these goals the proportion for LI programs and ideally Wx should be proportional to % of customers in service territory that are in fact LI?
- o *Amanda Dewey: Agree. This helps us recognize that the options available to utilities are affected by regulatory environment. This is a reminder to push from all angles.*

University of Michigan Energy Equity Project
Justin Schott, University of Michigan Energy Equity Project

Purpose: To educate participants about the University of Michigan Energy Equity Project.

Materials: University of Michigan Energy Equity Project Presentation: Using metrics to Achieve Energy Affordability
- My background is working with young people. Going out in crews for a pilot and helping people in Flint understand their energy bills is a way that I personally got an introduction to energy insecurity. I realized the solutions we had at the time weren't reaching most

people that had major needs rooted in historical disparities. This is where my motivation comes from.

- The Energy Equity Project (EEP) has a lengthy report that available and it provides tools. One example is the map we have that allows filtering through census tracts.
- Work is a collaborative effort with environmental justice organizations. We have people that advise and support us.
- We are working within the four pillars of energy equity. We use different labels than ACEEE but same concept. We understand there are multiple dimensions of energy equity.
- Justice40 – framework that discusses at least 40% of benefits go to disadvantaged communities. They have a tool to identify who is "disadvantaged."
- EEP is driven by multiple stakeholders. We held a lot of sector-specific listening sessions over 2021 and early 2022. We heard from 400+ people in designing EEP.
- Most of the work we did was in designing metrics. First, we identified various potential metrics and asked people to score them (via poll) and this is the material that working group members used as a starting point to develop final metrics. Each working group was active for a year and had the task of thinking about guiding principles and how to get access to quality-data to support metrics, as well as best practices.
- We had 40+ contributing authors to the project. A mix of backgrounds from communities, regulators, researchers, government, academics.
- We started focusing on guiding principles and defining concepts like "restorative justice." Then we started looking into metrics and best practices and gave guidance about how they should think about access to data. We identified which metrics were paid with which dimension and geographic availability of data.
- We looked at 150 potential metrics and were only able to get quality data for 29 of them. We also recognized best practices and identified priority data gaps.
- Thoughts on where data makes sense: metrics are great as a backstop because we do not have an equitable system and everything is embedded. We are using metrics for recognition and distribution, we wanted to focus on metrics that have high-impact and are highly-available. We had some guidance in the framework for people to pick metrics.
- We think all metrics need to tie back to guiding principles (start with strong guiding principles). Community places a role in helping arrive at metrics. You need to start with defining the community. We want to address cumulative impacts.
- We found some potentially new datasets so for example evictions. The restorative chapter also looks at indigenous communities because they are often left behind.

Julia Friedman – via chat: Is restorative equity the same as intergenerational?
  o *Justin Schott: I think it is broader. This group sought to come up with their own definitions of restorative justice. They've identified some key pillars as community ownership, indigenous sovereignty and reparations. It certainly touches upon intergenerational, but it is broader.*
  o *Annette Beitel: "Is "restorative" justice same as "reparations"?*
  o *Justin Schott: Reparations is a subset of restorative justice.*

- EEP offers some guidance on steps to advance energy equity. First four steps don't involve any data, they are just about organization and having guiding principles. Points 5-7 get to accountability. One thing that is useful is to center equity into your work and think about your audiences.
- EEP offers templates to help with planning. Our next step is to focus on implementation and making these templates more accessible.

- What's at stake? Energy-burdened households are twice as likely to enter and stay in poverty over a two-year timeframe. Energy impacts poverty and health.
- Research performed shows major disparities by race and with children under 5 years of age experiencing shut-offs. Trends even after COVID show that disconnection is increasing and enrollments in assistance plans often don't keep up with increased demand. Number of shut-offs that we see is ramping up.

    Laura Goldberg – via chat:
    https://jeremiahbohr.github.io/pages/publications/Bohr%20McCreery_2020_SF.pdf
    energy burden and poverty study that Justin mentioned

    Eve Pytel – via chat: Is Detroit utility number skewed by water?
    - *Justin Schott: Yes, this is a big piece, but in terms of the message that utility affordability ranks next to housing affordability I think that holds true.*

    Karen Lusson – via chat: Is this your independent data on the number of households with children under 5 facing shutoffs? That's an important stat and I'd like to know who to cite on that.
    - *Justin Schott: This slide references the Energy Justice Lab at Indiana University: https://energyjustice.indiana.edu/projects/index.html*

    Julia Friedman – via chat: Is there a link for the study with the COVID death statistics and energy moratoria?
    - *Justin Schott: Duke University is the lead author on this. SAG Facilitator will follow-up.*

- We know pace of Weatherization is too slow in MI. MN asked the question, how long would it take for MI to serve every eligible household? And the answer was approximately 3 centuries. We've been doing additional work to determine how MI can address Weatherization projects faster and figuring out how to come up with budgets to bridge the gap.
- Low-income residents are seeing their rates increase. Many energy efficiency benefits might be increasing for moderate and low-income customers in recent years, but historically they were mostly going to C&I customers and non-low-income customers. In addition, we see a lot of rate increases focused on residential customers and not C&I customers.
- We are trying to give people tools to make decisions or make the case that more data is needed. Data examples. Link to interactive map with all datasets we compiled and loaded: *https://eep.earthrise.media/map*
- The idea is that people can use this map and determine what metrics they want to look at and start figuring out ways they want to target resources to neighborhood and communities. Data is available in excel file as well.

    Karen Lusson: How much of this is driven by statutory energy saving goals and given financial incentives that utilities have to meet? How can we fix this?

    Sy Lewis – via chat: Is there a reason the utilities cannot provide the services automatically to these families that they know already qualify. Give them the option to opt out of this FREE service to keep their utilities on and there home more comfortable. rather than have them opt in to a program that the vast majority do not know exists.

- *Justin Schott: I've heard support from this idea from my community groups for this auto-enrollment. Amanda shared this as well. As far as why it can't happen, I think it is a question for utilities.*

Annette Beitel – via chat: Does the Energy Equity map allow for overlaying other sources of data, such as customers served each year? In other words, can we use your data to see if programs are targeting those who need the services most?
- *Justin Schott: The best way to do this is to go into github data and you can get Excel file and 29 data sets by columns based on census tract. You can add your own data and run your analysis.* https://github.com/Energy-Equity-Project
- *Annette Beitel – via chat: Is github data nationwide?*
- *Justin Schott: Yes, with the caveat that there are data gaps in federal sources and particularly tribal lands. Everything is at the census tract scale.*
- *Annette Beitel – via chat: Are you using ArcGIS to visualize the data?*
- *Justin Schott: It is on Mapbox. But ArcGIS might be easiest way to do it if you are doing visualizations.*

- Second tool looks at energy affordability plan. How many $/yr people spend above 6% of their income. We have this divided by income brackets and shows county level data. The cumulative gap we have in Cook County is over $6M that people are paying beyond what they can afford. This tool also has an investment planning guidance on where to make investments.
- Another example: showing the percentage of investments going to low-income households compared to the percentage representation to low-income customers from the utility. We used utility filings for this information.
- As an example, for DTE 34% of customers are low-income, and this tool shows that an equitable investment should have been $17M, but what was proposed in the filings was $13M and you see that disparity. Then, when you look at the savings delivered the disproportion is more evident. As an example, for savings for DTE low-income customers were only 9% of proportion of savings of the portfolio. This tool looks at disparities and what we want to do to bridge the gap.
- When you have disparities that grow over the year it gets very significant. In MI both DTE and Consumers need an additional $120M in energy efficiency funds to serve all low-income customers.
- In IL the definition of low-income is different and expanded from what other states use. IL increases who is eligible for programs, and this means that close to 45% of low-income population is eligible for programs. This change in definition shifts the dynamic and narrows the gap, by changing the leaderboard.

Mary Johnson - via chat: How is energy burden calculated in the tool and what is the data source? Is specific data shared by utilities or are there assumptions made based on Census tracts?
- *Justin Schott: The score on energy burden comes from U.S. Department of Energy (DOE) Low-Income Energy Affordability Data (LEAD) Tool on energy burden. It has some complex modeling methodology. You can do some powerful filtering and it has many features.* https://www.energy.gov/scep/slsc/low-income-energy-affordability-data-lead-tool
- *DOE LEAD Tool:* https://www.energy.gov/eere/slsc/maps/lead-tool
- *Amanda Dewey – via chat: I really like this example of how measurement can consider patterns over time instead of at a single point.*

Karen Lusson: One thing I've learned related to legislation is that in some parts of the state when you say 80% AMI and depending on size of household that this can be lower level than LIHEAP level of 200% of federal poverty level. But in other parts of the state the participation is expanded. It is interesting how federal poverty level numbers and AMI might shift depending on where you are within a state.

- o *Justin Schott: Yes, this is a nuanced take. When you have multiple options for eligibility this casts a wider net.*

Gregory Norris: I heard you talk about changes were made going from year to year, but is there a data that says that once the problem was identified that within a certain timeframe that the change was made?

- o *Justin Schott: We use data based on utility filings, so we get it in three-year cycles. We wouldn't see it until the next 3-year cycle.*

- On the distributional side there's a lot we can do to ensure households that have been underserved are at the front of the line. We now know who those communities are. We need more budget, but we also need to be working with people that need it the most so we can ensure the programs we do are protecting people from climate change impacts.

Karen Lusson: Do you look at moratorium policies in terms of seasonal moratorium? Do you look to see if in the summer the state incorporates heat index (and humidity) as this is what kills people in summertime.

- o *Justin Schott: We don't have a metric at the moment, but this is covered by Indiana University work - https://energyjustice.indiana.edu/projects/index.html.*
- o *Amanda Dewey: the current ACEEE Scorecard is probably too broad. It looks at whether the state is doing something in this realm, and not specifically at moratorium policy.*
- o *Karen Lusson – via chat: Right now most states' summer moratoria requirements require the temperature to hit 95 degrees before the moratorium kicks in, which is too high, in our view. That level needs to come down and also measure heat index (humidity) and what the impact of the humidity does to the "feels like" temperature. It also would acknowledge the human body's inability to cool itself when humidity is very high. The AG's office's bill (HB 1541) and the Campaign to End Energy Poverty's bill (HB 2172) would incorporate the heat index aspect of dangerous weather conditions. https://www.washingtonpost.com/world/interactive/2021/climate-change-humidity/*

Annette Beitel – via chat: Do you know of other universities that have Energy Justice Initiatives that we could reach out to in addition to the Indiana U Energy Justice Lab?

- o *Justin Schott: It is a growing field; Carnegie Mellon has a group. Nicholas Institute at Duke is another. https://engineering.cmu.edu/news-events/news/2022/05/04-energy-equity-gap.html*

Amanda Dewey: Sierra Club is spearheading a project in the Southeast and includes researchers from Georgia Tech. Sharonda Williams-Tack was leading the project but just left for DOE, so Pedro Cruz is now leading. Marilyn Brown at Georgia Tech is a lead researcher.

- o *Justin Schott – via chat: CEJST is also a great source of data you can download: https://screeningtool.geoplatform.gov/en/ - 3/33.47/-97.5*

Julia Friedman – via chat: How are ACEEE and Univ of Michigan incorporating the federal government's Climate and Economic Justice Screening Tool into your work? Do you recommend it as a tool to guide utilities' equity work?

- *Amanda Dewey: At ACEEE we are working with local and state governments advocating and guiding on best practices. One of them is always use datasets available to you to guide your work. We've been sharing this tool with various governments to identify priority areas within their boundaries.*
- *Justin Schott: I think health data is also valuable. Percentage of asthma or diabetes or life expectancy. This is important for climate risk, using the CEJA tool (they also use DOE energy burden data)*

Laura Goldberg – via chat: Interested in whether IL utilities have any reaction to applying aspects of this data to IL.

Karen Lusson: Can utilities clarify if they are feeling the pressure from regulators on the spending caps and savings goal requirements? Let's have this discussion if we can at a future meeting.

Closing and Next Steps
Celia Johnson, SAG Facilitator

- The SAG Policy Manual Subcommittee is developing "equity and affordability reporting principles" to include in the next Policy Manual update, which will be finalized in the coming months. The SAG has a goal of finalizing reporting metrics related to these principles by the end of 2023. Both efforts will include coordination with and an opportunity for input from the IQ EE Committee.