

IL EE Stakeholder Advisory Group Large Group SAG Meeting

Tuesday, January 28, 2020
10:30 am – 4:00 pm

President Lincoln DoubleTree Hilton Hotel
701 E. Adams Street, Springfield, Illinois

Attendee List and Meeting Notes

Attendees (in-person)

Celia Johnson, SAG Facilitator
Nick Hromalik, Midwest Energy Efficiency Alliance (MEEA) – Meeting Support
Omayra Garcia, Peoples Gas & North Shore Gas
Jim Heffron, Franklin Energy
Julie Hollensbe, ComEd
Jean Ascoli, ComEd
Molly Lunn, ComEd
Jordan Berman-Cutler, ComEd
David Hernandez, ComEd
Karen Lusson, National Consumer Law Center
Jennifer Morris, ICC Staff
John Pady, CEDA
Dan Maksymiw, CEDA
Salina Colon, CEDA
Mick Prince, IL Dept. of Commerce and Economic Opportunity (DCEO)
Wayne Hartel, DCEO
Jim Jerozal, Nicor Gas
LaJuana Garrett, Nicor Gas
Chris Vaughn, Nicor Gas
Mike King, Nicor Gas
Leanne DeMar, Nicor Gas
Anne Mitchell, Jenner & Block, representing Nicor Gas
Alberto Rincon, Future Energy Enterprises
Theo Okiro, Future Energy Enterprises
Kathy Johnson, Green Homes Inc.
Kevin Johnson, Green Homes Inc.
Kristol Simms, Ameren Illinois
Deb Perry, Ameren Illinois
Andy Vaughn, Leidos
Mallory Audo, Leidos
Matt Armstrong, Ameren Illinois
Lance Escue, Ameren Illinois
Shelita Wellmaker, Ameren Illinois
John Carol, Ameren Illinois
Tammy Jackson, Ameren Illinois
Lauren Casentini, Resource Innovations
Ashley Palladino, Resource Innovations
Kristen Platt Kalaman, Resource Innovations

Nick Horas, Resource Innovations
Tisha Burnside, Resource Innovations
Chris Neme, Energy Futures Group, representing NRDC
Laura Goldberg, NRDC
Cate York, Citizens Utility Board
Taso Tsiganos, IL Attorney General's Office
Lauren Pashayan, IL Attorney General's Office
Randy Bennett, University of Illinois Training Center
Larry Dawson, IL Association of Community Action Agencies (IACAA)
Community Action Agency Representatives:

- Ed Horton, Sangamon County Community Action Agency
- Dalitso Sulamoyo, Champaign County Regional Planning Commission
- Kris White, Will County Community Action Agency
- Bob Murphy
- George Smith
- Bob Moore
- Gary Goins
- Wayne Thompson
- Jon Vrandenburg
- Becky Pruden
- Lial Field
- Nancy Wilson
- Jason Kesol
- Mike Kelly

Attendees (by webinar)

Katie Baehring, Franklin Energy
Elizabeth Chant, Optional Energy
Ann Collier, Opinion Dynamics
Mark DeMonte, Whitt-Sturtevant, representing Ameren Illinois
Devin Day, SEDAC
Nick Dreher, MEEA
Jason Fegley, Leidos
Aimee Gendusa-English, Citizens Utility Board
Noelle Gilbreath, Community Investment Corp.
Andrey Gribovich, DNV-GL
Mary Ellen Guest, Chicago Bungalow Association
Amir Haghghat, CLEAResult
Jeffrey Hurley, Blue Green Alliance
Cheryl Jenkins, VEIC (IL-TRM Administrator)
Larry Kotewa, Elevate Energy
John Lavalley, Leidos
Monique Leonard, Ameren Illinois
Samarth Medakkar, MEEA
Abigail Miner, IL Attorney General's Office
Jennifer Moore, Ameren Illinois
Phil Mosenthal, Optimal Energy, on behalf of the IL Attorney General's Office
Rob Neumann, Guidehouse
Randy Opdyke, Nicor Gas
Antonia Ornelas, Elevate Energy

Patricia Plympton, Guidehouse
Emma Salustro, ComEd
Karla Soriano, Opinion Dynamics
Ellen Steiner, Opinion Dynamics
Erin Stitz, Applied Energy Group
Mark Szczygiel, Nicor Gas
Harsh Thakkar, Franklin Energy
Gary Ambach, Slipstream
Janice Boman, Embertec
James Carlton, People for Community Recovery
Kelly Gunn, ComEd
Mary Johnson, Resource Innovations
Haley Keegan, Resource Innovations
Greg Nettleton, Franklin Energy
Stephanie Robinson, Ameren Illinois
Tom Buhligm, Morgan County Community Action Agency
Margaret Dugger, Madison County Community Action Agency
David Goodrich, Madison County Community Action Agency
Cathy Felter, Embarras River Basin Agency
Tony Grant, McLean County Community Action Agency
Earline Gualdoni, Wabash Area Development Inc.
Angela Winter, Wabash Area Development Inc.
Tammy Talley, Wabash Area Development Inc.
Lenny Hamende, Sangamon County Community Action Agency
Jennifer Jaeger, City of Rockford
Jay Keeling, McHenry County Housing
Andy Odom, Community Contacts
Lowell Tosch, Community Contacts
Tom Seno, Community Action Partnership of Lake County
Paulette Hamlin, Western Egyptian Community Action Agency
Jason Kessel, Western Egyptian Community Action Agency
Vicky Torgerson, Kendall County Community Action Agency

Meeting Notes

- Follow-up items and next steps are identified **in red** throughout the notes.
- A summary of follow-up items can be found at the end of this notes document – see pages 17-18.

Opening and Introductions

Celia Johnson, SAG Facilitator

- The purpose of the meeting:
 1. To provide stakeholders, utilities, and program participants with foundational information on state and federal IHWAP requirements and goals, as well as the utility-braided IHWAP programs; and
 2. To hold a statewide discussion of considerations and opportunities within the delivery of braided IHWAP/utility funded programs.

Overview of Utility-Braided IL Home Weatherization Assistance Program (IHWAP)
Mick Prince, IL Department of Commerce and Economic Opportunity (DCEO)

- IHWAP is designed to help low income households save fuel and money, while improving the health, safety, and comfort levels of homes. Important to talk about the health and safety component of IHWAP as it is part of the mission statement. This program is not just about EE, but in the end, we hope that these homes are energy efficient.
- IHWAP is administered by Community Action Agencies (CAAs).
- Prior to the Future Energy Jobs Act (FEJA) IHWAP partnered with DCEO's Energy Office to conduct weatherization projects, when DCEO administered a portion of utility EE programs.
- Post FEJA: DCEO entered into a Memorandum of Understanding with utilities to create a braided partnership.
- Funding sources for IHWAP:
 - Illinois utilities
 - Dept. of Energy/WAP (\$13 million per year)
 - 15% of the LIHEAP allocation for weatherization (\$25 million per year)
 - 10% from state LIHEAP allocation (\$10 million per year)
- Grant Periods:
 - HHS: 16-month grant
 - DOE: 12-month grant
 - State LIHEAP: 15-month grant
 - Designed this way to protect local entities from state budget impasse if it occurred again in the future.
- Program Regulations and Policy:
 - 2 CFR 200: Rules and regulations the federal government requires grantees to comply with.
 - 10 CFR 440: WAP policy from DOE, weatherization specific policy, such as the products we can use.
 - DOE Program Guidance: Weatherization Program Notices (WPN) and Program memos that we must be in compliance with.
 - We must also comply with the IHWAP Field Standards. Originally created by IL that then was nationalized by DOE.
- IHWAP housing types: Single family (SF), multifamily (MF), small multifamily (1-4 units), group homes, large multifamily (5+ units).
- Applying for IHWAP:
 - Clients apply at local administering Agency.
 - Large pool of clients by using a joint application with LIHEAP.
- Client prioritization:
 - Regulations require that we must prioritize certain clients such as elderly, disabled individuals, and those with children under 5 years. Client applicants receive priority points. Homes with the most points receive assistance first.
- Energy audit:
 - 3-hour process, a whole home assessment that requires a site-specific audit. This is a very detailed audit which may differ than other energy audits.
- WeatherWorks: IHWAP's DOE certified energy audit tool.
 - Created in 2000, has not been updated/changed since.
 - System is used for: The contractor price catalogue, applications, document assessment information, create work orders, calculate savings and investment

ratios, tracking timelines and budgets, documents final inspections, and reporting grant costs.

- Jim Jerozal, Nicor Gas: Will there be a “WeatherWorks 2.0” update?
 - A: There is a plan to rebuild this system. We will reach out to the utilities for feedback. We would like a rebuilt system to work similar to how LIHEAP provides reporting to utilities. We recently signed an agreement with U of I to start exploring the next system update.
- Q: What is the timeline?
 - A: We want to get this upgrade done before we have to recertify with DOE, which is due in the next 4 years. We are taking our time to do this right.
- Q: Is there going to be an RFP?
 - A: We are keeping all options open at this point.
- Scope of Work for IHWAP Projects:
 - Blower door guided air sealing from top to bottom, attic insulation, wall insulation, heater retrofit.
 - Also do lighting, water conservation measures, water heater and air conditioning replacements.
 - Health and safety:
 - We install exhaust fans (ASHRAE 62.2 compliance), smoke and CO detectors, crawl space ground moisture barrier, correction of combustion appliance venting, correction of site drainage (gutters, sump pumps), stair repair for client and worker safety, dryer venting to reduce fire hazard.
- Chris Neme, representing NRDC: Under what conditions are appliances replaced?
 - A: We have some life cycle replacement guidelines and EE requirements.
- Chris Neme: What percent of homes have heating or AC systems replaced?
 - A: It is high, upwards of 70% for heating. For AC we have made it a little more restricted. Need to include window unit efficiency so that the client is not paying more for energy due to AC escape.
- Chris Neme: For homes with electric resistance heat, do you use mini-splits?
 - A: Absolutely, even without cooling, the replacement of resistance heat is key. We use heat pumps and mini splits.
- Q: Can you explain funding sources?
 - A: There are two pots of money, \$3,500 for health and safety. \$15,000 EE retrofits (these are the max). The average cost is around \$12,000 - \$13,000 per project (including health and safety upgrades).
 - There are three funding sources for EE measures, but using a third source is reviewed on a case by case basis. Using three sources of funding is rare.
- IHWAP Quality Control Inspections:
 - All IHWAP inspectors must obtain a Building Performance Institute (BPI) Quality Control Inspector Certification.
 - DOE told us that lots of people would have this certification. In reality this is a weatherization-only certification and can be seen as a barrier. This is a difficult certification to acquire.
 - However, clients do not suffer from a poor inspection. All inspections are done well and at a high level of proficiency.
- Q: Once a project is completed, is a homeowner given information about how to maintain or use new equipment?
 - A: Yes, that is part of the final inspection. But it is something that we want to get better at, especially with the advanced systems that are being installed.
- Q: Does the 10-week (U of I) training include the QCI?

- A: QCI has a lot of prerequisites, so you can't just sit for it at the same time. It requires in-field training; therefore, it is not part of the 10-week training.
- Dan Maksymiw, CEDA: To clarify, you have to get your energy audit certification before BPI.
- State and Federal Monitoring Requirements:
 - 10% of completed projects will be monitored for quality assurance by OCA Weatherization Specialists (from DCEO).
 - There is also DOE and HHS for annual monitoring. This happens almost every year, likely due to the size of the Illinois programs.
- Taso Tsaiganos, IL Attorney General's Office: For your energy audits, is health and safety a separate pool of money, is there any overlap? How does a person qualify? If there is a broken window how is that assessed?
 - A: DOE has very specific guidance on window replacement, largely because this became a window-only replacement program. We actually don't call this health and safety; it is seen as a building envelope issue. But it does not always have a positive SIR.

Community Action Agency Profile

Larry Dawson, IL Association of Community Action Agencies (IACAA)

- IACAA's Mission: Support our Community Action Agency members and help them to fight poverty in their communities. We focus on health and safety goals.
- We work with Resource Innovations (RI) to help deliver the utility programs. We have statewide meetings and regional meetings to get real-time feedback on program operation. RI helps us with outreach around productivity. There were growing pains in the first year of the IHWAP-braided program, but believe we have hit our stride now.
- We work closely with RI on the agreements with local Agencies, especially those with capacity to go above what DCEO funding will allow.
- The birth of Community Action: 1964 Economic Opportunity Act. President Johnson's war on poverty set a national priority to eliminate the paradox of poverty and economic growth.
 - At a local level the definition of eliminating poverty is a little different: it needs to be everything from a think tank to annual assessments, and then developing wrap around services.
- Each local agency is locally rooted: elected officials, low income community members, local businesses.
- Cross section of the community action network: each agency is unique, each geography is unique, with their own history and needs. Each CAA needs to take an individual approach to eradicating poverty.
- 1/3 of our agencies are local government entities.
 - Example of a unique issue: if there is a hiring freeze, but weatherization funding is increasing, local agency has to be creative.
- Many program offerings by CAAs: affordable housing, emergency shelter, foreclosure prevention, WIC programs, food pantry, Head Start, and many more.
- Q: What is housing rehabilitation? Any EE connections?
 - A: HUD has programs such as building ramps for disability access. I know that the CAAs try to link clients to EE programs when eligibility is met.
- Not all programs are offered by all CAAs, but let's talk about population served:
 - Most weatherization projects are for families under 150% the federal poverty level (FPL) which is \$38,625 for a family of four.

- Older housing stock, significant maintenance deferred, so a lot needs to be done when we get in to a home (one stop shop).
- Diverse Challenges and Opportunities across the network:
 - We work with RI to try to quantify the differing issues such as staffing levels (some CAAs only have 1 or 2 people and the exit of a key staff person can have a big impact).
 - The contractor procurement process is a very challenging process, even after going through that whole process you can have very little to show for your efforts. Please help spread the word about the need for contractors to participate.
- Q: Do Agencies have in-house contractors or do they hire independent contractors?
 - A: We have a small number of Agencies that have in-house contractors, but most must go outside the Agency through procurement.
- Laura Goldberg, NRDC: Have you tried to pair programs together to help leverage other funds?
 - A: Some CAAs do leverage housing programs, but we can get into more detail how this works this afternoon.
- Significant roof issues can lead to deferrals due to the high price tag that prohibits this activity.
- Lots of interest in MF, we can go into more detail during CEDA's presentation. However, MF is only offered by a handful of agencies around the state. We want to work with DCEO to increase the access to more renters, but as stated previously, there are more challenges to ramping this up.
- Regional approach: each CAA has specific territories. In the future we want to reinstitute 6 regions throughout the state to help CAAs collaborate and share resources to better reach regional goals.
 - One issue that lead to this regional focus was the lengthy procurement process. It would be great to bring stable pricing across a region and help meet contractor needs. There is an issue where even if a contractor has been cleared by one CAA, they still need to go through a different CAA's procurement approval process. Streamlining this would be a significant improvement.
- Contractor retention helps CAAs share contractors with surplus capacity. DBEs is an area that we want to improve upon so that more DBEs are brought into the program.
- Agency Waiting Lists:
 - No CAA has sufficient funds to serve all eligible households in their communities. Each CAA handles their wait lists differently. How the list is started and managed is different depending on the CAA.
 - How the application process is managed impacts whether there is a waiting list. Some CAAs will not accept any applicants after the maximum number of applications that can be assisted that year has been reached, therefore minimal wait lists occur.
- Q: What happens to customers on Agency waiting lists?
 - A: It depends, sometimes you will bring in another contractor, but that does not address funding issues when money runs out.
- Zach Ross, Opinion Dynamics: Can you talk about timing? Can a high priority person jump the list?
 - A: This depends on the CAA. Some Agencies will have, for example, ten slots so they will then reach out to ten people, including ranking them by priority, so that you are not having someone jump the list.
- Kristol Simms, Ameren Illinois: Can a person be stuck on the waiting list because higher priority homes keep getting added?

- A: That can happen, it depends on the CAA, but yes, some people stay on the waiting list for a long time.
- Chris Neme: Regardless of how the wait lists are managed, is it fair to say that none of the CAAs are getting close to reaching all the need?
 - A: I don't think there is a single Agency that has the funds to meet all weatherization customer needs.
- Chris Neme: Can you speak to the barriers for the CAAs serving more customers with the braided programs? Is the issue not having enough crews? Is it uncertainty on the funding so not wanting to recruit more contractors? Or something else?
 - A: Probably all of the above. The training certification is an issue, but even if you have the homes identified, you need the capacity of contractors to meet the need. Many of our existing contractors we have been in the program for years; the issue is bringing in new contractors. The timeframe constraints, the number of inspections with lots of paperwork and at a price point that might not be what the contractor is used to. But bottom line: we need more contractors.
 - A: All CAAs have robust demand for weatherization, but some Agencies will stop the application process once they meet capacity, while others take in applications constantly and manage expectations (we have 5 years of projects lined up). Agencies try to move forward priority projects.
- Laura Goldberg: There was a hope originally that braiding IHWAP with utility funding would help improve waitlists, did that happen?
 - A: I have not done a specific survey of CAAs on this question, but I can say that in 2020 we have 100% participation of all CAAs in the IHWAP-braided program, and it is having an effect. What specifically that effect is we cannot say yet.
 - Mick Prince, DCEO: I will add that with the exception of ARRA funding years we have always had wait lists.
- Karen Lusson: Would it help CAAs if additional notice were provided by the utilities on budgets for an upcoming year?
 - A: In 2018 we had a lot of expectations, but it took a lot of time to build capacity, resulting in frustration across the board. I think since then the CAAs have been working hard and have hit their stride. Knowing what your funding will be two years from now, yes that can help better make staffing decisions, but I think we are now working pretty well together. I think CAAs have taken a leap of faith, so keeping funding at a steady level is crucial.
- Taso Tsaiganos: How many of the houses have structural or electrical problems that might pre-screen them out of the program?
 - A: A great question that I can't speak specifically to. CAAs have their own funding sources, and their mission to help families as best they can. They try to get the homes to not be deferred, but would need to defer to the CAAs on what the specific deferral rates are.
- Taso Tsaiganos: Is there a standard policy that CAAs use, why is there such variation? What is the authority that governs these wait lists and process?
 - Kristol Simms: I think it is a good point. Understanding when there is an opportunity to review and comment on the state weatherization plan would also be useful.
 - A: I can let Mick address this further, but ultimately the rules do speak in detail to the priority system, but there is a little bit of flexibility on how that prioritization is applied. To Kristol's point, the state weatherization plan is discussed every year with input from other state agencies and utilities.

Customer Experience with IHWAP

John Pady, CEDA

- The application process is unique to the specific CAA. This presentation is specific to CEDA's process.
- Process:
 - CEDA does not do any intake of income qualified households, but there are many locations throughout the state.
- Assessment, collect information, application:
 - CEDA team will verify the client is qualified under the requirements of the programs.
 - Then the application goes to our scheduling department. Need to make sure the house is qualified for programs, so we send out staff to do both certification and verifications to get enough pool of homes.
 - There is probably a 30% fall off due to verification.
- Scheduling:
 - Verification completed.
 - Energy Assessment is scheduled. We require our contractors to go through the home with the energy auditor to make sure that the measures actually can be installed.
 - Project installation begins.
- Installation:
 - Start with the mechanical installation first, then have the architectural contractor show up, although this depends on the individual contractor.
- Q: Are there times when these steps are combined?
 - Not usually. A contractor relations specialist then walks through the project with the contractor, making sure all documentation is correct. The inspector then goes out to see the project with the client.
- Inspection:
 - Enter all required info into Weather Works
 - Completed project goes to costing analysis
 - Project and process closed out
- On average we are touching the client 7 to 8 times. We don't see this as a burden and aligned with our mission as a CAA for wrap around services. For CEDA, saving energy is actually our last priority, we have many other priorities.
- Q: Are the 7 customer touches coming from the same individual or is it different CEDA staff?
 - A: It is three different people from different departments. The inspector will be the same person, even if multiple visits are needed.
- Theo Okiro, Future Energy Enterprises: How long on average does this experience take?
 - A: Not counting back and forth on documentation, I would say it can be a 3-month process. But this is very specific to CEDA. Some CAAs are able to turn things around in a week, it just really depends.
- Taso Tsaiganos: When is the client educated?
 - A: We have a list of questions that we go through with each client at the beginning. We make sure we let clients really understand what the construction looks like.
- Chris Neme: For the inspection process, do your inspectors do everything for utility criteria?

- A: There is no difference, one inspection covers all requirements for all funding streams.
- Ashley Palladino, Resource Innovations: We shadow the inspectors and the state does as well.
- Chris Neme: It seems like there may be tradeoffs to the touches and the costs associated with it.
 - A: The funding is only for labor and materials; the number of touches doesn't impact the cost.
- Karen Lusson: From the customer's perspective how does this change for the utility-only weatherization programs (Agency projects funded 100% by utilities)?
 - A: There are some measure changes, it will not be a linear change because there are different missions for the programs.
 - Karen Lusson: In my view that is a philosophical question we need to determine. If the focus is what is best for the customer, can other adjustments be made in other utility programs to ensure that low income weatherization programs are essentially the same?
- Cate York, Citizens Utility Board: Can you address the issue of equipment sharing?
 - A: CEDA invested money to purchase 3 vehicles and 4 sets of audit equipment for utility-only weatherization projects, so there is no equipment sharing issue.
 - Cate York: Could resources be shared among Agencies?
 - A: In theory you could, although operationally I think this may be a challenge to implement.

IHWAP Considerations and Opportunities: Afternoon Discussion

See: [Opportunities Background and Discussion Topics Summary \(SAG Facilitator\)](#)

Background on IL Utility-Braided IHWAP Program

Ashley Palladino, Resource Innovations

- This presentation focuses on the utility-braided IHWAP program.
- There is a significant benefit provided to customers through these programs. Utilities would not be able to provide as comprehensive a retrofit without the braided funding streams. IHWAP is focused on health and safety improvements for customers.
- Goal of program: leverage IHWAP funding and existing CAA infrastructure to deliver comprehensive retrofits to stretch utility resources.
- 2018 was the ramp up year. After executing the MOU with DCEO, Agencies started braided funding in summer 2018.
 - 11 of 18 CAAs participated (North)
 - 21 of 25 CAAs participated (Ameren)
- In 2019 we increased activity, adding 6 agencies in the North, Ameren IL had 21 of 25 CAAs participating.
- 2020: 23 of 25 in Ameren territory participated (Kankakee and Grundy County participate in the north) and full participation in northern Illinois.
 - Focus on right sizing budgets and better understanding CAA capacity.
 - We really think about the agency relationships and take into account projects and budget.
 - We also want to focus on increasing braided volume.
 - Multi-family is really only done in large buildings in Cook County, but looking to expand this effort in other parts of the state.
- Karen Lusson: Can you talk about how you determine the funding for an Agency for braided vs utility-only weatherization programs?

- A: Utility only programs are only in the northern part of the state. We start with the Agency's overall capacity, and then back into a number. We also look at the changes throughout the year when IHWAP funding might have ended. For funding, we are trying to be consistent from year to year. We need to right size, not just per agency, but also year to year.
- Program Detail:
 - SF and MF occurs in North only, although Ameren is looking to expand to MF as well.
- Measure incentives:
 - All measures are provided at no cost to the customer. Funding covers the materials and labor. This also includes program support and admin (PS&A) incurred by CAA. This is the number you will see from the utility; it includes everything. The budget information Mick shared includes material and labor. That is why the number will be larger in this presentation.
- Chris Neme: Does the budget information include health and safety?
 - A: Yes.
- Cost share agreement: there is a 50-50 split on the labor and the materials. This is between the utilities and Agencies.
- Cate York: Can you provide an explanation about the differences between IHWAP-braided and utility only in Ameren Illinois' service territory, for mechanical (HVAC) funding?
 - Kristol Simms: We interpreted our order from the Commission and executed an MOU based on that interpretation. We are interested in discussing further with stakeholders.
 - Q: How do these projects look different without HVAC in Ameren IL service territory?
 - A: The Agency will pull out what in the project falls under Ameren and does the split, and then puts everything else on the IHWAP. The customer still gets the same experience and the funding is stretched further.
- Chris Neme: Could we make different adjustments for the funding split? Since this is an accounting mechanism and customers get the same experience?
 - A: The agreement with IHWAP is a 50-50 split, which is to ensure that both entities are funding the measure equitably. Yes, there is no difference for customers.
- Karen Luson: Braiding the IHWAP program allowed for doubling the homes in the North, so I wonder about adding HVAC to Ameren if that would have the same effect?
- Agency Partnership: DCEO and utilities meet throughout the year to work through processes.
- SF Braided projects:
 - 2018: 145 South, 283 North
 - 2019: 378 South, 319 North
 - 2020: 490 South, 395 North
- Chris Neme: How many weatherization projects were completed by Agencies that were not braided with utility funding?
 - A: 2,600 total on average for 2019, so about 1700 projects.
 - Mick Prince: In Ameren IL service territory there is no utility only program, all of the projects are braided with the utility.
 - Laura Goldberg: It is worth noting that the North are also doing MF so this is not exactly an apples to apples comparison.

- Karen Lusson: Are there utilities interested in growing IHWAP-braided capacity?
 - ComEd: We want to grow this channel year over year, but it was not something we could do in year one. We are trying to build capacity with the CAAs, and keeping the focus today on what has gone into building this channel.
 - Nicor Gas: We are committed to growing this channel. We want to build capacity, but we do not want to over burden the CAAs.
 - Peoples Gas/North Shore Gas: The same for us. We are smaller, but CEDA has been an amazing partner along with Lake County. The challenge has been how to build this up in a smaller service territory.
 - Ameren IL: We have commitments for this in our plan and we will live up to them. FEJA also changed things on how DCEO serves weatherization, and we need to acknowledge that. We find today's discussion helpful and want to continue to find ways to invest and improve.

Opportunity #1: Agency Capacity Building

- **Background:**
 - Hiring and training new field staff can be a challenge for Agencies. Are there changes that can be addressed to make it easier for Agencies to onboard staff, both to backfill open positions and increase capacity, while not jeopardizing the qualifications and training that this type of program requires?
- **Key Questions:**
 1. How do you fill the various roles in an IHWAP-braided program from an Agency implementation perspective?
 2. What are the existing training requirements and are there potential changes that could be considered to help Agencies onboard staff and build capacity?

Ashley Palladino, Resource Innovations

SAG Facilitator Request: Share utility implementation context for opportunity #1.

- I think you will see that we have overcome a number of barriers. We have acknowledged that CAAs are each different, and we have spent years of hard work to address some of these issues.
- The utilities are committed to addressing capacity. When we talk about capacity building this could be: hiring more staff, finding more contractors, ensuring staff retention and onboarding.

Larry Dawson, IACAA

SAG Facilitator Request: Share Agency perspective on capacity building + challenge for Agencies to recruit and retain enough contractors to complete weatherization work.

- IACAA recently conducted a training survey with Agencies. Feedback included a variety of ideas.
- The biggest take-away: CAAs expressed an overwhelming positive view of the quality of the trainers and state of the art facility provided by the University of Illinois Training and Certification Program (TCP training).
- Other recommendations:
 - Offer "test out" capability for candidates with significant experience and/or similar certifications.
 - Offer HVAC training during the slow business period for contractors.
 - Offer more training opportunities throughout the state, rather than just in Champaign, to be closer to Agencies.

- Possibly have a decentralized approach to the training (there are also personal ramifications such as being away from one's family).
- Offer conceptual or classroom-based training courses online.
- Offer training courses on implementing renewables.
- Cate York: Is there any discussion about coordinating with the solar workforce training programs in FEJA?
 - A: We are open to partnering with other programs. We just did a training with the Midwest Renewable Energy Association. It is something we would like to incorporate at some point in the future. We did run into an issue with the CHA on how to connect the project to customers, so conversations are ongoing.

Mick Prince, DCEO

SAG Facilitator Request: Share an overview of IL Weatherization Training and Certification Program (TCP) at University of Illinois and state/federal rules guiding training requirements; update on online module component being considered.

- Training is a challenge to capacity building.
- ARRA 2009: IHWAP received \$250 million in funding.
 - Had a two-year sunset
 - A massive ramp up happened, but quality suffered and as a result accountability increased.
 - Accountability continues to increase from all levels.
- Kristol Simms: Do you have historical data for projects during that time?
 - A: CAAs were earning less than they currently do. We did about half of what we could have done. We left a ton of money on the table from an EE perspective; the audits were not as comprehensive. There were also less measures offered, such as water conservation.
- Weatherization is a specialized field that requires specialized skill set and certifications.
- We have to do open and competitive procurement, which takes a lot of hours for local Agencies.
- The properties we serve also create issues: over-crowding, dilapidated housing stock, persisting mold and moisture concerns.
 - Budgets don't always allow us to mend all the ailments of a home.
- There is also no funding earned for deferrals. Some of this contributes to the administrative costs.
- Mobile homes are an example where there are not many contractors who have the experience to work in these homes due to the little contractor services that might normally occur. This requires more training on our end.
- Getting through something really fast does not equal high quality. Our goal is high quality, and so sometimes more training creates better results for customers in the end.
- Building science: when the program began 42 years ago there was little science to back up the activities being done. The field is ever evolving, and has improved a lot, but it is also why training needs to continue and be amended from time to time.
- Client safety is crucial. We might be the only professionals visiting the home. Further, weatherization can have adverse effects so we need to be careful and have knowledgeable contractors that are being sent in.
- Chris Neme: Do you have times when to address back drafting that you might want to install an electric heat pump?
 - A: We do sometimes do fuel switching. We now have a mechanism to deal with this through health and safety. There are few instances with a water heater that we can't make an adjustment.

- Dan Maksymiw: Often times the electric infrastructure does not support fuel switching, so it actually is not cost effective.
- Importance of training: cost effectiveness and client savings.
 - We only get one chance with customers. Due to a DOE rule we cannot serve a home again that was served in 1994 or later.
 - Need to build a really good scope of work and make sure that we maximize utility energy savings measures.
- TCP Certification Curriculum:
 - Weatherization 101, heat transfer, building fundamentals, building diagnostics (blower door), infrared and mid-course assessment, heating systems (basic and advanced), AC and Heat Pumps, health and safety, and then a comprehensive building assessment and final exam.
- We also get feedback that trainees want more hands-on training, at the same time we are trying to develop online portions of the training.
- Q: With prerequisites, can you test out of the weatherization 101?
 - A: We actually make that portion very IHWAP specific, and we get feedback that it is helpful, so we are hesitant to exempt this.
- Q: Could you create some kind of mentorship or shadowing?
 - A: We intentionally break up the training so that trainees get a chance to take what they are learning and apply it in the field. This is why the 10-week training program takes six months to complete.
 - John Pady: The accreditation is based on 40 hours of training per section, which is required by the accrediting body over the training center, it is not just required by DCEO or the training center.
- Ashley Palladino: What does the training look like 'on the ground'? Can any Agencies speak to their experience?
 - Agency Comment: This training requirement has been debilitating to our work. I have a very qualified individual but without this certification we cannot move forward. I have tried to get MOUs in place with other CAAs to get contractors in my area, but have been unsuccessful. There is no reason why some of this cannot be done online in 2020. We need this certification process to be more user friendly.
 - Mick Prince: We completed a wage study to get CAAs to pay competitive wages so that you are never out of a person who cannot do the work. We want to work toward having this not be an issue.
- Q: What about using subcontractors?
 - A: I have no doubt it is a barrier; we are working to get non-IHWAP employees into the training so that we can have more subcontractors.
- Kristol Simms: Have we benchmarked the IL training requirements relative to what other states are requiring?
 - A: I don't think it is a fair appraisal to compare Illinois to other states. We have a high standard and should keep it.
- Procurement is a difficult process for local agencies. But we want to do a better job in the future to make sure we are in touch with more contractors to help them through this process.
 - Qualified contractor shortages: there is a general shortage nationally of trades people, and this trickles down to weatherization too. We need to adopt a regional approach to procurement.
- Ashley Palladino: How can DBE/diverse contractors be engaged in the procurement process?

- A: I have been encouraging everyone to go to a negotiated process. You still need to be pre-qualified but then we want there to be a negotiation for the final contract.
- Larry Dawson: Yes, I think this could be a way to make improvements. We have been talking about this in our regional meetings. We have talked to ComEd about ways they might be able to encourage their contractor network to become involved with the IHWAP channel as well. We are pushing for a regional approach and asking for collaboration, including on price negotiation.
 - A: I also think minorities are not well represented in the building trades, which is a separate conversation, but one I am happy to be a part of. It would be great to showcase the IHWAP program to contractors to encourage greater participation.
- Chris Neme: Are there programs like “home performance coalitions” that might exist or be created in the weatherization space?
 - A: I am not aware of one, but I think the group assembled today could do a good job of creating such a group.
- Chris Neme: This could potentially be a Market Transformation approach, a way to make an investment to build capacity in the future.
 - John Pady: Ryan Miller created the Home Performance Association in North Carolina and think something similar could be done here.

John Pady, CEDA

SAG Facilitator Request: Share an update on the new CEDA training center + workforce development impact + personal experience with TCP training.

- CEDA is establishing a Weatherization Program Operations and Training Center in South Holland, IL.
 - State of the art training center, including a home inside the center for many different scenarios that trainees can explore.
 - TBD on actual start date for training center.
 - We recently received feedback on the housing tests, so working with the state on what that should look like and that will determine our start date.
- Q: Who will the instructors be?
 - A: We are still trying to figure this out, but we will use existing trainers and also maybe hire new people.
- Laura Goldberg: How is MF being incorporated into the training and center?
 - A: We are developing more than just a QCI course for MF, we want to make sure that the new facility includes a MF space with large boilers and stacked ventilation to help address MF home needs. Which again is why the start date is TBD because we want to get this done right.
- Theo Okiro: Is this also a space that can be used by community partners beyond just for the training?
 - A: We cannot have the center as an open space due to liability and safety issues. As of now we have locks on the labs due to safety, but would like to make sure our partners can use certain parts of the space.

Opportunity #2: Maximizing the Number of Customers Served while Considering Claimable Savings and Costs

- **Background:** The purpose of this discussion is to discuss how we can increase savings opportunities and increase the number of customers served by the IHWAP delivery channel.

- **Key Questions:**

1. Are there Non-Energy Impacts of IHWAP-braided programs that should be taken into account in planning the next utility EE Plan portfolios?
2. Are there income qualified/income eligible-specific baselines that could be considered for weatherization measures in the IL-TRM?
3. Are there other funding sources that can support non-energy saving (health and safety) improvements (e.g., existing sources and opportunities to leverage funding for the necessary improvements that facilitate EE weatherization projects)?

Ashley Palladino, Resource Innovations

SAG Facilitator Request: Share the overarching purpose of the IHWAP program; this topic focuses on the utility braiding component.

- Interested in discussing how we can increase savings opportunities and increase the number of customers served by the IHWAP delivery channel.

Key Question: Are there income qualified/income eligible specific baselines that could be considered for weatherization measures in the IL-TRM?

- Karen Lusson: Is the basis for this exercise a way to increase energy savings and then utilities will put more money into the program?
 - A: The primary point is regardless of where the money is allocated, we want to be maximizing savings.
 - Chris Neme: It might be about not getting enough yield per dollar, and so maybe it is more about increasing the comprehensiveness of measures offered to customers.
 - Kristol Simms: We are always balancing costs and savings throughout the portfolio.
- Mick Prince: We are not in complete alignment when it comes to mission statements between IHWAP and utility EE portfolios. We (DCEO) puts more on health and safety, which is not as big of a priority for utility EE programs.
- Chris Neme: There should be a mechanism for what your baseline is when it comes to the current conditions and what is being done—in an insulation example—this could make a difference to the energy savings claimed, and for health and safety.
- Laura Goldberg: Other states use the age of the home for setting the baseline. We also know that there are many NEIs for IQ programs, but they are not being included in the benefits calculations. I do think this might level the playing field and help with some of this.
- Karen Lusson: I'm interested in a survey of Community Action Agencies on how to ensure the IHWAP-braided program is working well from their perspective, in particular on increasing capacity. Allowing anonymous responses may be useful.
 - Zach Ross: The evaluators have completed surveys for Ameren Illinois; happy to share this information.
 - Larry Dawson: IACAA's surveys have focused on capacity, staffing, certification issues. We are open to and happy to fulfill this role.
 - Ashley Palladino: We also have an advisory committee with IACAA that helps create a platform for improvement.
- **Next steps: If there is interest, the IL-TRM Administrator will establish a TRM Working Subgroup focused on discussing income qualified measures during the TRM Version 9.0 update process that will kick-off this spring. Contact the IL-TRM Administrator, VEIC, for additional information: iltrmadministrator@veic.org**

Key Question: Are there Non-Energy Impacts of IHWAP-braided programs that should be taken into account in planning the next utility EE Plan portfolios?

- Evaluator Update – Patricia Plympton, Guidehouse, and Ann Collier, Opinion Dynamics
 - Evaluators are completed non-energy impacts studies for ComEd and Ameren Illinois income qualified programs, working to not only quantify the health benefits but also monetize the benefits.
 - We are using participant surveys from the ComEd and Ameren service territories, and starting before they receive weatherization and then tracking changes a year after to identify the delta.
 - Stakeholder feedback is being compiled and survey instruments are expected to go out soon. We will continue to survey participants through Q4 of 2020.
 - Surveying is for both utility-only weatherization and IHWAP-braided weatherization.
 - **Next steps: Additional discussion on non-energy impacts will take place in the [SAG Non-Energy Impacts Working Group](#), including if and how to incorporate results from NEI studies. Please contact the SAG Facilitator to join this Working Group: Celia@CeliaJohnsonConsulting.com.**

Key Question: Are there other funding sources that can support non-energy savings improvements opportunities to leverage funding for the necessary improvements that facilitate EE weatherization projects?

- Jordan Berman-Cutler, ComEd: ComEd has been doing research on leveraging funding, some non-profits and municipal partners to maybe do a study for braiding funding, focus on EE measures and their health and safety priorities.
- **Next steps: The SAG Facilitator will follow-up with ComEd on when research on leveraging other funding sources will be completed. This will be scheduled for a future SAG discussion.**

Closing and Next Steps

- Topics that may require additional discussion:
 1. Multifamily IHWAP-braided weatherization opportunities
 2. Addressing the acute need for contractors, including recruiting diverse contractors
 3. Consistent market pricing for contractors across regions of the state
 4. Understanding the process for reviewing and commenting on the State of Illinois Weatherization Plan
 5. Understanding deferrals – how large of an issue are deferrals and are there resources that can be leveraged?
 6. Inspection process – are multiple inspections needed (for example, inspections by both IHWAP and utilities)?
 7. Surveying Community Action Agencies on increasing their capacity
 8. Understanding utility-only weatherization initiatives
- Specific follow-up items on Agency Capacity Building:
 1. Are there Non-Energy Impacts of IHWAP-braided programs that should be taken into account in planning the next utility EE Plan portfolios?
 - **Additional discussion on non-energy impacts will take place in the [SAG Non-Energy Impacts Working Group](#), including if and how to incorporate results from NEI studies. Please contact the SAG Facilitator to join this Working Group: Celia@CeliaJohnsonConsulting.com.**

2. Are there income qualified/income eligible-specific baselines that could be considered for weatherization measures in the IL-TRM?
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iltrmadministrator@veic.org
3. Are there other funding sources that can support non-energy saving (health and safety) improvements (e.g., existing sources and opportunities to leverage funding for the necessary improvements that facilitate EE weatherization projects)?
 - The SAG Facilitator will follow-up with ComEd on when research on leveraging other funding sources will be completed. This will be scheduled for a future SAG discussion.