



May 11, 2022

SAG Reporting Working Group Meeting: ComEd

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Overview of Stipulation Language to Be Discussed

6) Income Eligible EE and Financial Assistance

a) *Customer Engagement.* ComEd commits to:

- 1) Provide relevant IE EE program information to its customers at appropriate customer assistance “touch points”, including follow up with customers who have received financial assistance⁸ with information about relevant IE EE offerings.
- 2) Provide relevant financial assistance information, including information about ComEd assistance grant programs, to its customers at appropriate energy efficiency program, particularly at IE EE program, “touch points.”
- 3) Develop and distribute literature for IE customers, which contains information about financial assistance and energy efficiency programs for which they may be eligible. The literature will be printed in both English and Spanish.
- 4) Provide online resources that provide IE customers with comprehensive information about financial assistance and energy efficiency programs for which they may be eligible.
- 5) **Work with stakeholders to develop progress metrics for ICC-filed Quarterly Reports in the second quarter of 2022 and present progress on energy efficiency and financial assistance efforts described above at a joint Committee and SAG meeting.**

⁸ For purposes of this Revised Stipulation Agreement, “financial assistance” is defined as LIHEAP, PIPP, ComEd CARE programs as well as other financial assistance programs available to ComEd low income customers, such as the ComEd Bill Payment Assistance Program and any successors.

Other Pieces of IE EE & Financial Assistance Section

- b) *Mapping of Assistance Needs and Targeting Delivery of Weatherization Services:* During the Plan 6 Period, ComEd will collect a variety of data for purposes of mapping areas of financial assistance needs and targeting energy efficiency and weatherization efforts. Data will be reported quarterly in the ICC-filed Quarterly Report and updates on targeting efforts will be provided in the ICC-filed Quarterly Report, and at least annually at joint SAG and Committee meetings, with commitment to seek input from interested stakeholders.
- c) *Evaluation of Customer Engagement and Targeted Energy Efficiency Delivery Efforts:* ComEd will direct its independent evaluator to perform one or more process evaluations of the Customer Engagement and Mapping of Assistance Needs and Targeting Delivery of Weatherization Services efforts described above during the Plan 6 Period and will share results at a joint SAG and Committee meeting.
- d) *Pilot Connecting Customers with Payment Trouble to Energy Efficiency:* ComEd Energy Efficiency will work directly with relevant ComEd business units to create a pilot or program that recruits customers who are payment troubled (e.g., customers at risk of being disconnected; with high arrears) into its IE energy efficiency programs, with commitment to incorporate ideas and input from interested stakeholders on pilot design and modifications, as practicable. ComEd will direct its independent evaluator to perform an impact and a process evaluation of the pilot. ComEd will provide updates to the SAG and Committee in joint meetings on pilot progress and the evaluation results, and include updates in ICC-filed Quarterly Reports, as appropriate. [Similar language also in CEJA.]

Existing IE Metrics (Stipulation)

A) Reporting: Below is a list of reporting metrics for ComEd's Revised Plan 6 related to IE Multifamily and equity/affordability, that the Company agrees to begin reporting on in 2022. Separately, ComEd agrees to support for inclusion additional reporting metrics or topics in an updated version of the EE Policy Manual, and the Parties agree that negotiations regarding the final list of those additional reporting metrics or topics to be included in an updated Manual must be conducted through the SAG processes that address such updates.

1) IE Multi-Family Reporting Metrics [Condensed]

- a) *Program Data* – ComEd commits to providing the following in its ICC-filed Quarterly Reports:
 - b) *Actuals (YTD)*
 - 1) Participation – buildings by zip code and apartment units
 - 2) Spending – incentives, non-incentives, total
 - 3) Savings (1st year) – MWh, therms
 - c) *Measure Data/Comprehensiveness of Treatment* – ComEd commits to providing the following in its ICC-filed Annual Reports:
 - 1) % of buildings that received different types of EE services:
 - a) Whole building assessments
 - b) Only DI measures
 - c) In-unit
 - d) One (1) or more major measures listed by type
 - d) ComEd supports additional participation, measure, and comprehensive building treatment data to be discussed via SAG processes for inclusion in an updated EE Policy Manual, including a list of measures installed and the following totals provided for each measure, indicating which measures were installed in unit vs. common area.

2) Equity-Affordability Reporting Metrics

- e) ComEd commits to report on the following in its ICC-filed Annual Reports:
 - 1) Program participation, by zip code, with average income information
- f) ComEd supports the discussion of additional equity and affordability metrics at SAG for possible inclusion in an updated version of the EE Policy Manual.

Existing IE Metrics (Stip cont. and CEJA)

4) Health & Safety

- a) ComEd commits to annually providing the following Health & Safety-related metrics for IE Whole Building Retrofit Programs at joint SAG and Committee meetings, in 4th quarter quarterly SAG reports, and in ICC-filed Annual Reports.
 - 1) Number of properties assessed for the program (broken out by single-family and multifamily)
 - 2) Number of assessed properties that had identified H&S issues
 - 3) Break down of type of H&S issues identified and addressed
 - 4) Number of properties deferred because of health and safety issues and general trends in the type of related H&S issues (will also be provided in ICC-filed Quarterly Reports)
 - 5) The percentage and/or dollar amount of the Health and Safety Fund that has been spent down (will also be provided in ICC-filed Quarterly Reports)
- b) ComEd supports the discussion of additional health and safety metrics at SAG for possible inclusion in an updated EE Policy Manual

5) Other Reporting

- ComEd will separate income eligible programs from market rate residential programs in reporting, and will ensure IE reporting includes a breakdown of IE single-family and IE multifamily.
- ComEd will provide reporting, tracking, and evaluation for IE single family versus IE multifamily programs

CEJA: Low Income EE Accountability Committee

- Participating utilities shall track and report how input from the committee has led to new approaches and changes in their energy efficiency portfolios. This reporting shall occur at committee meetings and in quarterly energy efficiency reports to the Stakeholder Advisory Group and Illinois Commerce Commission, and other relevant reporting mechanisms.
- Participating utilities shall also report on relevant equity data and metrics requested by the committee, such as energy burden data, geographic, racial, and other relevant demographic data on where programs are being delivered and what populations programs are serving.

Update

- 1) Provide relevant IE EE program information to its customers at appropriate customer assistance “touch points”, including follow up with customers who have received financial assistance⁸ with information about relevant IE EE offerings.
 - Examples: Testing opportunities to identify and help customers in need with a selection of relevant energy efficiency programs. The selection criteria for this initial group of targeted customers included recent receipt of financial assistance (‘hardship’), lack of EE participation, and located in zip codes with a higher proportion of ‘hardship’ and historically low EE participation; also generally sending materials to LICA customers.
- 2) Provide relevant financial assistance information, including information about ComEd assistance grant programs, to its customers at appropriate energy efficiency program, particularly at IE EE program, “touch points.”
 - Examples: Kits, HEA, etc. include financial assistance info.
- 3) Develop and distribute literature for IE customers, which contains information about financial assistance and energy efficiency programs for which they may be eligible. The literature will be printed in both English and Spanish.
 - Overarching brochure, that lays out both, distributed through all events, kits, etc.
- 4) Provide online resources that provide IE customers with comprehensive information about financial assistance and energy efficiency programs for which they may be eligible.
 - Our website AND The Smart Assistance Manager (SAM), launched in October 2021, is a self-service customer-facing digital tool designed to empower customers to take control of their energy decisions through personalized assistance utilizing data & analytics. SAM uses an “Assistance Finder” to collect customer specifics about their circumstances and preferences. Then, in combination with existing customer information and program eligibility requirements, SAM presents the programs and services which are a likely fit for that customer. Currently, SAM includes Financial Assistance, Energy Efficiency, and Demand Response programs within it’s set of potential recommendations. Since its launch, over 43,000 customers have utilized the tool helping to drive more sustainable customer bills and increased awareness and participation in the energy and financial assistance offerings.

Update (Other)

- a) *Mapping of Assistance Needs and Targeting Delivery of Weatherization Services:* During the Plan 6 Period, ComEd will collect a variety of data for purposes of mapping areas of financial assistance needs and targeting energy efficiency and weatherization efforts. Data will be reported quarterly in the ICC-filed Quarterly Report and updates on targeting efforts will be provided in the ICC-filed Quarterly Report, and at least annually at joint SAG and Committee meetings, with commitment to seek input from interested stakeholders.
- During Q1, internal coordination began with the Revenue Management and Financial Assistance departments to develop data reporting queries to allow for future mapping of financial assistance needs and targeting energy efficiency and weatherization efforts
- b) *Pilot Connecting Customers with Payment Trouble to Energy Efficiency:* ComEd Energy Efficiency will work directly with relevant ComEd business units to create a pilot or program that recruits customers who are payment troubled (e.g., customers at risk of being disconnected; with high arrears) into its IE energy efficiency programs, with commitment to incorporate ideas and input from interested stakeholders on pilot design and modifications, as practicable. ComEd will direct its independent evaluator to perform an impact and a process evaluation of the pilot. ComEd will provide updates to the SAG and Committee in joint meetings on pilot progress and the evaluation results, and include updates in ICC-filed Quarterly Reports, as appropriate.
- ComEd is currently conducting research of pilots by other utilities, to learn from and replicate best practices



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Thank you

