

**Illinois EE Stakeholder Advisory Group
Equity Subcommittee Meeting:
Joint with Income Qualified (IQ) North and South EE Committees**

Wednesday, December 13, 2023 (Teleconference)
9:00 am – 12:00 pm

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Meeting Materials

Materials will be posted on the [December 13 meeting page](#).

- [Ameren Illinois Diverse Procurement Market Development Initiative Presentation](#)
- [ComEd Presentation: Market Development Initiative Implementation Update](#)
- [LIEEAC IQ South Subcommittee Update Presentation](#)

Attendees

Celia Johnson, SAG Facilitator
Caty Lamadrid, Inova Energy Group (SAG Meeting Support)
AJ Young, Greenlink
Alex Deeb, Ameren Illinois
Allison Gregoire, Nicor Gas
Amy Jewel, Elevate
Billy Davis, Bronzeville Community Development Partnership
Briana Moore, Will County Land Use Department
Cheryl Johnson, People for Community Recovery
Chester Kolodziej, Sustain Rockford
Chris Neme, Energy Futures Group, representing NRDC
Chris Vaughn, Nicor Gas
Christina Pagnusat, Peoples Gas & North Shore Gas
David Brightwell, ICC Staff
David Clay, South Suburban Mayors and Managers Association
Deb Dynako, Slipstream
Deondre Rutues, Future Energy Enterprises (IQ South Committee Facilitation Team)
Diana Fuller, Walker-Miller Energy Services
Elizabeth Horne, ICC Staff
Erin Dopfel, AIQUEOUS
Erin Stitz, AEG
Eve Pytel, Franklin Energy
Gregory Norris, Aces 4 Youth
Jarred Nordhus, Peoples Gas & North Shore Gas
Jill Steiner, Saldor Research
Jonathan Skarzynski, Nicor Gas

Josh Schreck, The JPI Group
Julia Friedman, Opower
Julie Hollensbe, ComEd
Karen Lusson, National Consumer Law Center (NCLC)
Kari McCue, Nicor Gas
Kari Ross, NRDC
Kate Shonk, Citizens Utility Board
Keely Hughes, The JPI Group
Kendra Lee, The JPI Group
LaJuana Garrett, Nicor Gas
LaShelle Newland, Resource Innovations
Leyah Williams, ICC
Mary Hemmer, Senior Services Plus
Mary Johnson, Resource Innovations
Matt Armstrong, Ameren Illinois
Mia Berrios, People for Community Recovery
Michael Brandt, Elevate
Molly Lunn, ComEd
Nelson May, Future Energy Enterprises (IQ South Committee Facilitation Team)
Nick Bafaloukos, ComEd
Nick Lovier, Ameren Illinois
Nikole Dipillo, The JPI Group
Odette Watson, East Central IL Community Action Agency
Omayra Garcia, Peoples Gas & North Shore Gas
Pat Justis, Ameren Illinois
Paulette Hamlin, Western Egyptian Economic Opportunity Council
Philip Halliburton, ComEd
Philip Mosenthal, Optimal Energy, representing IL AG and NCLC
Quinn Parker, Encolor Consulting
Randy Opdyke, Nicor Gas
Ron Markus, BCMW Community Services
Ron Siddle, CMC Energy
Ronna Abshure, ICC
Sam Dent, VEIC (IL-TRM Administrator)
Scott Eckel, ICC
Seth Craigo-Snell, SCS Analytics
Stephanie Robinson, Ameren Illinois
Stephen Robinson, Northwest Austin Council
Susan Buck, ComEd
Sy Lewis, Meadows Eastside Community Resource Org.
Ted Weaver, First Tracks Consulting, representing Nicor Gas
Theresa Collins, Senior Services Plus
Tim Dickison, Ameren Illinois
Tina Grebner, Ameren Illinois
Tisha Burnside, Resource Innovations
Victoria Nielsen, ScottMadden

Meeting Notes

Follow-up items indicated **in red**.

Opening & Introductions

Celia Johnson, SAG Facilitator

Purpose: To discuss the Ameren Illinois diverse procurement market development initiative; For ComEd to share an update on selection of their Market Development Initiative Implementer; and, for the IQ South EE Committee to report-out on recent IQ South Subcommittee efforts.

Ameren Illinois Diverse Procurement Market Development Initiative

Nick Lovier, Ameren Illinois Quinn Parker, CEO of Encolor Jill Steiner, Founder of Saldo Research

Purpose: To discuss lessons learned from the Ameren Illinois diverse procurement Market Development Initiative (MDI).

Material: [Ameren Illinois Diverse Procurement Market Development Initiative Presentation](#)

- The purpose of these efforts is to increase awareness, engagement, and participation for diverse businesses, in support of the 2022-2025 plan stipulation to bring in new vendors and focus on historically underserved markets.
- Most of the diverse businesses on Encolor's network are small. Some of the barriers that they face include lack of awareness and relationships, unless they have a previous relationship with implementers and utilities. Many of these businesses do not attend conferences and miss out on opportunities to build relationships. There is also limited ability to participate because of either close procurement processes or not being aware of opportunities. Finally, there can be a perceived inability to compete with larger organizations because small/diverse businesses cannot meet technical or performance requirements.
- In terms of mitigation of barriers, we try to promote opportunities outside of typical channels and offer opportunities to engage with Ameren staff. We also created individual webpages for every opportunity and there is a dedicated email inbox. All procurement opportunities with Ameren are now public. Small and diverse businesses seldom submit proposals that they do not think they can win because they have limited time and want to use it efficiently. In our partnership with Ameren, we are giving additional time for people to prepare a response and we have a support team to give technical training and support to diverse businesses.
- We create website landing pages for each initiative to support bidders with all documents, links, and information. We post materials for people unable to attend pre-conference calls.

Karen Lusson: Is this process for every single request for proposal opportunity?

Jill Steiner: We provide a landing page for every procurement opportunity.

Quinn Parker: We work closely with Ameren and Leidos to have these pages setup through a collaborative process.

- Encolor hosts technical workshops for potential bidders to help understand terms and conditions, scope of work, how to prepare a response, etc.

- Ameren made the decision to interview every diverse bidder that submitted a proposal. Even though it adds time to proposal effort, we feel this is important. Sometimes these small businesses might not show up on paper as well as they interview in person.
- We have supported Ameren and Leidos in four procurement opportunities, three of which we will talk about today. In some of these RFPs the result was contracting with diverse-led team with no previous relationship with Ameren. Something we learned is that we should keep the Q&A process throughout the entire process. This was feedback received after an RFP from participants and we are now implementing this.

Karen Lusson: When you were able to select diverse-business, were they IL-based businesses?

Quinn Parker: Some were based in IL. But we also see that even when an organization is not based in IL, they are conscious to bring in partners who are IL-based.

Greg Norris: How do you get on a list to receive RFPs?

Quinn Parker: There is not a technical list but Encolor posts RFPs in publicly available locations, for example through organizations such as AESP, MEEA, Energy Central. We share the opportunity with different industry partners, post it on webpage that we stand up, and also post on social media channels (LinkedIn). We have a marketing and outreach distribution email.

Jill Steiner: Email to get on Encolor's distribution list – eeoprograms_rfp@encolorconsulting.com

- Lessons learned include to publicly promote RFPs and look at other partners that can amplify proposal efforts. Additional detail to provide context of the work is important. We encourage utilities to make the budget visible because they might find out it is not meetable. The shorter the RFP the better, keep concise. Typically, the reason for short response timelines is that the programs need to launch by a certain date, but if there is a perception by diverse suppliers that they do not have a chance to meet timeline, they do not submit a response. Interviews are important to allow those with less technical writing experience to share their work.
- Discussion Questions
 - What additional barriers to diverse and small business participation in utility RFQs or RFPs do you see?
 - Are there additional activities to addressing barriers faced by diverse and small businesses that you recommend?
 - What other efforts to expand opportunities for small and diverse businesses could Ameren IL leverage or collaborate with?

Briana Moore: Can you expand on how you make RFPs more concise?

Quinn Parker: There are often sections that are not related to selection criteria. Most of the time, an evaluation scorecard is established before RFP is released. If utilities cannot map the criteria to each question asked in the RFP, then that might be a question that you should not include in RFP. Sometimes I see very ambiguous questions, for example a question about innovation, but oftentimes programs are not meant to be innovative.

Karen Lusson – via chat: How have you addressed what have been big roadblocks for smaller contract participation: utility security and significant insurance requirements?

Jill Steiner: In first RFP process we asked bidders to provide redlines to terms and conditions. This turned out to be onerous for bidders, but we worked with Leidos and Ameren to make sure that T&Cs (terms and conditions) were reviewed early without the need for bidders to engage an attorney for review. Leidos and Ameren also worked to meet both the utility and the diverse firm needs based on the risks associated with the scope of work.

Quinn Parker: Smaller businesses that have not worked with utilities before are often intimidated by insurance requirements. We encourage them to discuss with insurance brokers to see what that policy would look like for their business, and many are pleasantly surprised that the cost is not high.

Karen Lusson: Interested in hearing if other utilities are also doing to this extent?

Celia Johnson: The other utilities' market development initiatives are not as far along as Ameren's because they are newly launched programs; I will follow-up to share more information on the status of other diverse procurement initiatives.

Deb Dynako – via chat: It would be interesting to have utilities host a meet and greet with interested orgs.

Quinn Parker: This is not something that has been organized, but we hosted a technical workshop in Peoria and invited diverse businesses to that session for an opportunity to engage with utilities. This proved to be challenging, though it is not impossible. Sometimes these small businesses don't understand the value proposition of coming to an event, sitting down, and building relationships instead of working billable hours. We are conscious and careful of time and investment. The first thing we need to do is have diverse businesses see the value in building these relationships.

Karen Lusson: I wish contractors could see some kind of visualization that lists all of the programs and within those programs the level of contracting and which programs/contracts require trade allies. I think this information would be helpful also for people to see how long these contracts are for.

Cheryl Johnson – via chat: Karen. I'm a contractor and have my ICC license for 2.5. years and never got an opportunity to participate.

Quinn Parker: A multi-year contract for a small diverse business is golden. These are the type of opportunities that change business.

Deb Dynako – via chat: Perhaps a "matchmaking" approach: Pairing smaller orgs with larger orgs to build capacity.

Quinn Parker: I think for larger organizations there is a real opportunity to mentor and help develop small organizations to help them chase work as they build capacity.

ComEd Market Development Initiative Research Update

Nickolaos Bafaloukos and Susan Buck, ComEd

- **Purpose:** For ComEd to share an update on selection of their Market Development Initiative Implementer.
- **Material:** [ComEd Presentation: Market Development Initiative Implementation Update](#)
- We last presented in July session of the IQ Subcommittee when MDI program was earlier on, so we have more to share now.
- ComEd's MDI is part of revised plan 6 Energy Efficiency Stipulation Agreement and it has objectives to reduce participation barriers by diverse contractors and expand the supplier pipeline. We designed four main channels during Phase 1 for engagement.
- ComEd selected Walker Miller as implementation contractor for Phase 2 which focuses on MDI implementation. Walker Miller will be developing and employer advisory committee, they are also working on the creation of a diverse database and efforts to assist EESPs with back-office support to get into the network.
- We will standup the program through January 2024 and then the program delivery will start in Q1 with many recruitment and stakeholder engagement activities.

Karen Lusson: Why not an Illinois-based contractor? The money should be staying in-state if possible for the implementers (first tier contractors). Also, how are you setting up the vendor database?

Susan Buck: We will first stand up the database and then we work on adding vendors through relationship building. This task is about the development of a tool to be used to store information.

Nick Bafaloukos: This is not just a database of MDI implementation contractors but rather as a resource for the benefit of diverse vendors for all activities, and to promote partnership opportunities. This is a database that would be maintained and updated frequently.

- ComEd coordinates work with other utilities. Most of us are in startup phase and are sharing best practices and program learnings.
- Feedback was received from IQ North Committee on MDI initiative – see slide 7 for responses.

Nick Bafaloukos: When we bid out strategy work, we kept that separate from implementation work. We asked some people to bid into strategy piece and that were vetted to participate in the implementation work.

Molly Lunn: The RFP for the original strategy work was released over a year ago. We got recommendations from SAG on who should be in the bidder list. Recommended entities were invited to be on the bidder list, and if they provided the information then they were invited to bid.

IQ South Committee Report-Out

Nelson May and Deondre Rutues, Future Energy Enterprises (IQ South Committee Facilitation Team)

Purpose: For the IQ South EE Committee to report-out on recent IQ South Subcommittee efforts.

Material: [LIEEAC IQ South Subcommittee Update Presentation](#)

High Heat Subcommittee Overview

- We know that in Illinois high heat days / scenarios are increasing in intensity and frequency, which puts a lot of people at risk. Income qualified customers and BIPOC communities are impacted by high heat days.
- We are looking to address this issue by developing a pilot that delivers cooling resources to impacted communities, incorporating EE measures. Measures may include portable air source heat pumps, ductless mini splits, etc. This would ideally reduce bill payments for customers.
- Also thinking about customer experience, including creating education materials for customers.
- We know that LIHEAP used to run a cooling program but they no longer offer it.

High Heat Subcommittee Key Questions

- How do we help people pay for cooling resources? We have found that IQ customers are reluctant to turn cooling on until 85 degrees, which is concerning. We need to eliminate the stigma that cooling resources are a luxury. Cooling resources are important especially for vulnerable people.
- Who should be priority customers?
 - Right now, we are operating under the assumption we should mimic current programs. Our current template is the LIHEAP emergency furnace replacement program.
- What are pros / cons / cost / energy usage of various measures?
 - Portable air source heat pumps, ductless mini splits, AC window units
- Best measure packages for IQ customers in different residential dwelling types?
 - Mobile homes, single family, multifamily – this is not a one size fits all solution. What measure is delivered will likely depend on the situation of the homeowner.
 - We have also thought about the possibility of cooling a single room in a home. Cooling centers exist in communities. The issue with cooling centers is assuming that people are willing and able to transport themselves to those cooling centers. There may also be stigma associated with going to a cooling center.

Odette Watson: When we do mini splits, especially with homes that you may serve, quite often there is construction, electrical upgrades needed. Are you also including these other project requirements, where customers may not have the dollars to afford the upgrades necessary to support a new system?

- *Nelson May: Good point. We are considering these other needs. Right now, we are working to understand the upfront costs required for this type of project.*
- *Odette Watson: Suggests mimicking the LIHEAP furnace pilot for cooling, so those dollars can be used to provide the construction upgrades needed.*

Karen Lusson: Is this a pilot that will be offered through the Ameren program? There are Inflation Reduction Act (IRA) federal dollars that will be available through the state of Illinois. This includes similar measures, panel upgrades, weatherization measures, etc. I think the program is set to begin in late 2024. I know Ameren has committed to work with the state of Illinois on this effort.

- *Nelson May: Great to know, we are trying to mix funding sources.*

Additional Key Questions

- What census tracts are most at risk for high heat in IL?
 - Young children, elderly, pregnant mothers, etc.
- What outreach will be most effective?
 - Looking at leveraging the type of outreach that will be most successful
- What is the best way to educate customers about the dangers of high heat?
 - Our most recent research was on an EPA competition, looking across the entire state to figure out how community leaders are educating community members on the dangers of high heat. We are also looking at what organizations in IL are already doing to educate constituents about high heat.

High Heat Subcommittee Deliverables

- Literature review of background research
- The business case for a High Heat/AC program
- High Heat Pilot program proposal(s)
- Proposal to pay for High Heat Programs (measures and cost of energy)

Eve Pytel: Is this specific to single family or multi-family?

- *Nelson May: We are still actively investigating what would be good to target with a pilot program. We are not excluding any residential dwelling types at this time.*
- *Eve Pytel: Senior housing has been a concern in the Chicago metropolitan area. This is from a public health impact. Because of health impacts in the Chicago area, wondering if that is an area of focus.*
- *Nelson May: Will look into this further.*

Karen Lusson: Has this proposal been greenlighted by Ameren yet?

- *Nelson May: The purpose of this High Heat IQ South Subcommittee is to design this pilot and propose it to Ameren – Ameren is at the table with the IQ South Subcommittee to address some of the potential hurdles*
- *Karen Lusson: Ameren will have in its records customers who have access to LIHEAP. This program year started Oct. 1. It's open first to seniors, disabled persons, and families with children under 6. The most vulnerable populations are always served first, in the initial month of LIHEAP. This suggests a match you want to make when reaching the most vulnerable customers.*
- *Nelson May: Most utility programs operate on a first come / first served basis, which we don't think is appropriate for this type of program. Agree with looking at what already exists with identifying the most vulnerable.*

Odette Watson: We really need to look at the health-home visiting community, or medical community that reaches vulnerable elderly and infant family's populations. Those groups can help in getting literature out and explaining the importance of maintaining healthy temperatures within homes in summer months. There is a lot of asthma and COPD, and many home visiting groups and a large community already established to assist and make referrals. These organizations would be a good channel for the delivery of educational materials.

- *Nelson May: Will follow-up with you.*
- *Karen Lusson: Ameren could also help you connect with customers who have received medical certificates, which provide a short disconnection protection because of a medical condition. Just another thought.*
- *Tim Dickison – via chat: "Medical Certification: A utility shall not disconnect service to a residence for 60 days upon receipt of a valid medical certificate for a resident of the*

household, so long as the account is eligible for medical certification under Section 280.160.”

- *Odette Watson: Health departments are required to complete a plan every five years to figure out where is asthma and you will see that mapping around industrial areas. It would be nice if there are materials that educate them on cooling*

Related follow-up:

- **If anyone is interested in signing up for notices about the Inflation Reduction Act (IRA) rebate programs in Illinois, do so here: <https://epa.illinois.gov/topics/energy/energy-rebates.html>**

Integrated Energy Plan Subcommittee Overview

- Objective is to create a framework for community energy planning for CBOs/CAAs to develop integrated Clean Energy Plans for underserved communities. Identify available programs/funding sources. Goal is to create some sort of flow chart that helps local governments understand process and plan for their best solution based on goals. We are trying to understand the needs of CBOs and CBAs as it relates to creating plan and figuring out how to serve them.
- Before we start developing a plan, we need to understand where the need is and what programs or funding sources exist to support the development of clean energy resources within their community. What support do communities need to develop a clean energy plan and access available funding – data access might be difficult.

Briana Moore: There has been work in Illinois on stretch codes and building performance standards. It may be useful for CBOs / CAAs to talk amongst themselves about ongoing projects, lessons learned, and funding sources. Slipstream would be a good contact to reach out to.

- ***Celia Johnson: The SAG Market Transformation Savings Working Group has discussed stretch codes and building performance initiatives in Illinois. Follow-up with Nelson May to share their recent presentation to SAG and contact information for Slipstream.***

Integrated Energy Plan Subcommittee Key Questions

- Which communities in Ameren IL have greatest need?
- What programs or funding sources exist to support development of clean energy resources within their community?
- What support do communities need to develop a Clean Energy Plan and access available funding?

Integrated Energy Plan Subcommittee Deliverables

- Literature review of available resources on developing Clean Energy Plans for CBOs/CAAs/Local Governments
- Flowchart for local governments and CBOs/CAAs to implement Clean Energy Plans based on their goals
- List of relevant programs/funding sources for CBOs/CAAs and Local Gov to develop and implement their Clean Energy Plans

Diverse Contractors Subcommittee Overview

- Objective is to identify and recruit 10 additional diverse contractors interested in supporting Ameren Illinois' energy efficiency portfolio by the end of 2024.

- Goal is to develop recommendations for identifying, assisting, and providing ongoing support to diverse businesses.

Diverse Contractors Subcommittee Key Questions

- What certifications does a diverse contractor need to become an Ameren IL Program Ally? What is the process and existing support for becoming an Ameren IL Program Ally?
- If under-skilled, understaffed, underfunded, how do we develop diverse contractors so they can successfully participate as an Ameren IL Program Ally? How do we create a pipeline of diverse contractors?
- What is the best way to identify and engage diverse contractors that want to support Ameren Illinois Program Initiatives?

Diverse Contractors Subcommittee Deliverables

- Completed:
 - Literature Review: Summarizing available research/lessons on developing and supporting diverse contractors, implementers, and professionals
 - Two-page summary of key learnings – challenges/opportunities
 - Business Case: Developing the Business Case for increasing diverse contractors, implementers, and professionals in the Clean Energy ecosystem.
- In Progress:
 - Identifying and Geomapping Existing Diverse Contractors/Implementers: Developing a comprehensive list of available diverse contractors and implementers; geomapping the contractors/implementers to identify gaps in service areas

Returning Citizens Subcommittee Overview

- The objective is to support the successful identifying, training, hiring and retention of “returning citizens”. There is a similar effort being led by SEEL. They are assisting by sharing their experience.
- In 2024, identify and recruit 10 returning citizens.
- For the purposes of this Subcommittee, “Returning Citizens” may also include developing: Strategies and tactics to help prepare those who are “in the system” to join the Clean Energy Workforce for when they are released, and strategies and tactics for those citizens who are eligible for diversion programs from the system.
- We have done some background research and are working on interviews with employers to understand their perspective.

Returning Citizens Subcommittee Key Questions

- What constitutes appropriate job skills training, including “soft skills”
- How to retain and ensure success of Returning Citizens
- How to support employers who hire Returning Citizens
- What programs exist in other states that have done a good job in training and job placement for returning citizens - can we benchmark our progress/program against these?
- How can we remove barriers to progress of returning citizens when they re-enter the workforce?
- How do we get organizations to be comfortable with hiring returning citizens?

Returning Citizens Subcommittee Deliverables

- Completed
 - Background Research Summary: Summary of background documents and “learned knowledge,” plus organized documents on Subcommittee SharePoint Site
- In Progress
 - Tool for Job Seekers: Written summary of skills, knowledge, support available for Returning Citizen job seekers and employees
 - “Business Case” for Hiring Returning Citizens:
 - Tools for Employers: Written summary of employer behaviors, appropriate management practices, support for employers who are seeking to hire or have hired Returning Citizens, including:
 - Plan for identifying and recruiting ten (10) Returning Citizens
 - 6 members on subcommittee are our technical experts

Closing and Next Steps

Celia Johnson, SAG Facilitator

- Ameren Illinois Diverse Procurement Initiative Presentation:
 - Email to be added Encolor’s distribution list – eeprograms_rfp@encolorconsulting.com
 - A stakeholder requested more information about other utilities’ diverse procurement initiatives. SAG Facilitator will follow-up.
- ComEd Market Development Initiative Update
 - No follow-up items
- IQ South Committee Report-Out
 - The SAG Market Transformation Savings Working Group has discussed stretch codes and building performance initiatives in Illinois. SAG Facilitator to follow-up with Nelson May to share their recent presentation to SAG and contact information for Slipstream.
- Related follow-up: Visit this website to sign up for notices about the Inflation Reduction Act (IRA) rebate programs in Illinois: <https://epa.illinois.gov/topics/energy/energy-rebates.html>