

Illinois EE Stakeholder Advisory Group Reporting Working Group

Thursday, August 4, 2022 Meeting
10:00 – 11:00 am
Teleconference

Attendees and Meeting Notes

Meeting Materials

- Posted on the [August 4 meeting page](#):
 - [Thursday, August 4 Reporting Working Group Agenda](#)
 - [ComEd Response to Stakeholders' Proposed Metrics](#)

Attendees (by webinar)

Celia Johnson, SAG Facilitator
Samarth Medakkar, Midwest Energy Efficiency Alliance (MEEA) – Meeting Support
Abigail Miner, IL Attorney General's Office
Andrey Gribovich, DNV
Billy Davis, Bronzeville Community Development Partnership
Cheryl Johnson, People for Community Recovery
Chris Healey, Enervee
Christopher Vaughn, Nicor Gas
Cynthia Segura, Citizens Utility Board
Dena Jefferson, Franklin Energy
Dunni Cosey Gay, Community Investment Corp.
Jen Valadez, Resource Innovations
Julie Hollensbe, ComEd
Karen Lusson, National Consumer Law Center
Laura Goldberg, NRDC
Mark Szczygiel, Nicor Gas
Matt Armstrong, Ameren Illinois
Michael Pittman, Ameren Illinois
Molly Lunn, ComEd
Nelson May, Future Energy Enterprises
Rebecca McNish, ComEd
Samarth Medakkar, MEEA
Sy Lewis, Meadows Eastside Community Resource Org.
Tina Grebner, Ameren Illinois

Opening & Introductions

Celia Johnson, SAG Facilitator

Purpose of August 4th meeting: To follow-up on the [May 11 Reporting Working Group discussion](#) of progress metrics for ComEd's EE and financial assistance efforts; ComEd will share feedback on stakeholders' proposed metrics.

ComEd Response to Stakeholders' Proposed Metrics

Molly Lunn, ComEd

- In May, we discussed stakeholders' proposed metrics for EE and financial assistance efforts. Progress metrics was a topic in ComEd's stipulation for the 4-year plan. Today ComEd is responding to these metric proposals.
- ComEd can move forward with 6 of 8 proposed metrics. Everything in green ComEd is able to do – [ComEd Response to Stakeholders' Proposed Metrics](#)
- **Metric 1:** Number and percentage of customers receiving utility bill assistance that were referred to EE measures/programs
 - ComEd can provide this information in quarterly reports, for a universe of programs. LIHEAP, PIPP and Supplemental Arrearage Reduction Program (SARP) as well as customers being referred to kits and the single-family weatherization program.
- **Metric 2:** Referrals to financial assistance programs
 - ComEd is able to report for kits and income eligible HEA (Home Energy Assessment). For single-family, we have two channels – in the process of incorporating. Working through how to do this in multifamily, but plan to work towards including MF. For other programs, where we're not doing referrals, we won't be reporting.
- **Metric 3:** Which programs and measures were recommended
 - We can do this at a high-level. Each program has an approach, but we will be able to report on this quarterly along with metric 2.

Discussion

[Laura Goldberg] Anything to expand on how to do this for multifamily?

[Julie Hollensbe] On the EE side, we're not regularly collecting tenant level information. To match this with financial assistance, in order to move forward with serving the property as a whole, we're collecting addresses but this doesn't create for easy matching on the back-end.

[Laura Goldberg] Understand that there are some challenges. Perhaps this working group can be a forum to discuss what solutions could be?

[Julie Hollensbe] In the spirit of trying to make it easier for folks to participate, there is the eligibility criteria in terms of the property qualifying. That will continue to be a barrier, but we can tease out what may be possible.

[Molly Lunn] Not to say we would have visibility on tenant participation, it's a challenge that since most of MF is served at the property level, not the tenant level, we run the risk of excluding MF participation when we try to do this.

- **Metric 4:** Number or percentage of customers that were referred to EE and followed through on EE work, including which programs/measures and if any future EE work is in progress or planned
 - We don't have the ability to track this data on the back-end. The programs that customers are getting referred to that we could potentially report on is when customers for IHWAP SF and kits, because when they're going into an LAA, we

- could potentially match this up. But we can't track whether they participate in a program for which we don't track at a customer level.
- Challenge is there is not tracking when a referral is made. Say a customer comes into an Agency. The expectation is that everything that's available to them is offered up but Agencies don't document each time they make a suggestion and track whether the customer goes through with a program.

Discussion:

[Karen Lusson] If I'm a customer with challenges and I speak to a service rep, that rep should refer me to an EE program. The rep can mark on the CSR script that the customer was referred, and EE folks would follow up. This is the connection that we're hoping to be made.

[Julie Hollensbe] Difficulty is tracking and reporting on every time that this is done. We currently don't have the capability to do this.

[Molly Lunn] It's helpful to have the conversation because we weren't thinking about those kinds of referrals. Referrals from those who help us deliver financial assistance. Reporting not in place now. Something we can think about internally. Can't do this right now.

[Karen Lusson] That would be great if you could focus on that. This is a natural element of the program (when a customer struggling with bill and seems to be the good candidate for EE).

[Julie Hollensbe] One way we're doing this is through a targeted campaign - reaching out to customers who're receiving assistance or in arrearage. We're making sure we're being proactive in connecting to EE programs. Last year we started better connecting customers at the call center, layering message and being respectful of financial assistance (they are meeting immediate need and not distracting them from a laundry list of things they can do). First helping with immediate need, then layering in messaging on energy efficiency. As we're building cross-promotion, we're putting in messaging at the right time. Don't want customers to be paralyzed with too many options.

[Karen Lusson] Agree this is important. I would add that at this point you have a rich data set at zip codes – arrearages, discussions, discussion notices - we're hoping this data can be used to examine companies hard hit by disconnection policies and focus on these communities. In the performance-based rate making case, an agreement has been reached between COFI and ComEd and the agreement is that the company will be working to reduce disconnection in the top 20 zip codes with the highest disconnection rate. Pretty good change that this will be ordered – staff agrees that this is a good affordability metrics. I think this represents an opportunity to focus on these communities and trying to connect them with energy assistance.

[Julie Hollensbe] My team has been working with the revenue management team and shares this report on discussion notices every month. Validating that these top 20 zip codes line up with the zip codes that we have prioritizing in general with EE because every one of these zip codes is at least 50% or higher below 80% AMI. We have made sure that this list of zip codes informs our outreach campaigns. Point is these align very well.

[Sy Lewis] If customers are eligible for a program, and know they are eligible for an energy assistance program and we're looking at data, why can't we sign them up for all the programs? I.e., these are the programs you're eligible for and we can sign you up right now.

[Molly Lunn] Issue is with the different options, what is the right fit for the customer? The idea is that they can then start to sign up, and for EE, they can get connected to the right program, but on the EE side, it's not a matter of signing up. Customer has to pick the right channel to go with. Can sign up customers and let them opt out, but the customer must proactively agree.

[Sy Lewis] What we're hearing from customers is everything is too difficult to sign up for – customer have trouble knowing what they can and can't do. When reaching out to both ComEd and Agencies.

[Molly Lunn] We'll take this feedback to our call center and EE.

[Karen Lusson] Can you walk us through the customer journey? A customer goes to a CAA to sign up for LIHEAP and PIPP. At that moment of signing up for assistance, how is it determined whether that customer is funneled in to the braided weatherization or ComEd only program?

[Julie Hollensbe] When a customer goes to an agency, they are offered LIHEAP and if they want to sign up for IHWAP, there's additional paperwork, additional info needed. In addition, our EE kits that we do with the gas utilities are done through the agencies, they are also offered to sign up for a kit. With the LIHEAP piece of it, the agencies are determining with that particular home, whether that will be IHWAP braided, only or the agency wants to do utility-only funded projects. It could then be that if the customer doesn't meet IHWAP only, so we allow the agencies to make the best decision based on their IHWAP goals and utility commitment. This gives agencies the flexibility. In general, yes, it depends on how much of a waitlist agency has and where they are in the IHWAP calendar year vs. the utility calendar year.

[Molly Lunn] It's not always someone's on a waitlist because not enough money, often because of capacity. CEDA could have plenty of money, but crews need to catch up.

[Sy Lewis] I have taken seniors to CEDA to get their bills paid for years before I became a part of this team. Not once has any of those seniors been offered a service other than financial assistance. No one was ever told about program other than these two things. Curious and concerned – is it every CAA and CBO that should be sharing this information? If that's the case something is missing. Just as an example, my mother just went to get assistance on her bill, she's never been given information other than what information that I gave her.

[Julie Hollensbe] That's good feedback – if this isn't how it's flowing to the agency, we need to better understand this. We don't get the feedback from the customers. We want to help solve for this disconnect.

[Sy Lewis] Example: I'm not very active on Facebook. Something came up where there were funds available through CEDA, funding available through the last cycle. Assistants made a post and transferred the information. It got 900 likes and 125 shares. What that

said is there's a disconnect with how this information is being put out. So many people engaged in this information, and they're actively seeking and sharing this information. For me this is significantly more engagement than received for normal postings on Facebook.

[Julie Hollensbe] We want to know how the information gets to CAAs clients and better work with the agencies. We want to better understand the gaps and better work with the CAAs and CBOs that are satellite organizations.

[Sy Lewis] Are the agencies being incentivized to make sure that their customers are taking advantage of the referrals and EE programs?

[Julie Hollensbe] Yes, we're paying them for the referral. If they're doing retrofit work, there's a compensation structure for the services that the agency provides. They are also paid on a per-kit basis.

[Molly Lunn] I think what we're talking about today is what we're hoping we can talk about through the IQ Committee. I think this is on the leadership team's priority list and hopefully we can have deeper conversations – without DCEO and CEDA folks here, we're missing a part of the puzzle.

- **Metric 5:** Data analysis on financial impact of energy efficiency and financial assistance
 - Not sure the best way to track this. There are lots of factors that contribute to someone's bill impact. What might make sense is for the Commission to do an analysis with an evaluator to look at a year's worth of data or some amount of data on what customers we had participate and impacts on bill before and after. Look at if it's helping with bill reduction. Help us look at what that study should look like. Our proposal is a one-time analysis by evaluation and discussion on what metrics to track following that analysis.

Discussion

[Laura Goldberg] Guidehouse is doing a similar analysis with DTE and consumers in Michigan. Consider speaking with the Michigan utilities.

[Karen Lusson] We don't always have to use the current evaluator; unless Guidehouse is well versed in the entire program, there are local entities, like universities and elevate and smaller independent evaluator in Illinois. Keep is local.

[Molly Lunn] There are always tradeoffs. Guidehouse is familiar with ComEd's programs. More than happy to look at a different group, but it could take longer. Wanted to name that this is a tradeoff.

- **Metric 6 & Metric 8:** Narrative updates on current efforts to coordinate financial assistance and EE.
 - Those narrative updates wouldn't change much quarter to quarter. Proposing this in the Q4; as well as narrative on how utility plans, forward looking, how utility increase outreach in the top 20 zip codes in the year to come (metric 8). This won't change a whole lot but will receive update quarter to quarter for Metrics 1-3.
- **Metric 7:** Number of locations for available for assistance through CAAs

- What we talked about on last call is that CAAs are the ones responsible for local agencies that are actually offering assistance. This could be discussed in the future with CAAs. Not data that we own. Happy to support a request to the CAAs.

Discussion

[Sy Lewis] We're aggregating data on the top 20 zip codes and finding that satellite organizations' dates and times of operation don't line up with what's on CEDA's website. We will be able to share this information soon. The goal is to better gauge what services are being provided. I hope this is something we can all use for data across the board.

[Julie Hollensbe] This is specific to CEDA or broader set of agencies?

[Sy Lewis] CEDA; all the agencies listed on the CEDA's website. We found that there's not an address listed on google maps; so, if someone goes to the site they should know where to go. Often customer would go on google, call, not have an answer, and then they would go to the site location. We're going location by location to make sure call information and availability is up to date.

Closing and Next Steps

Celia Johnson, SAG Facilitator

Follow-Up Items

Metrics #1-3: Working Group can hold a follow-up discussion on MF metrics in the future, if needed – there are unique challenges due to property qualification, and not collecting tenant information.

Metric #4: ComEd is not able to report this metric. ComEd will think further about this in the future.

4. *Number or percentage of customers that were referred to EE and followed through on EE work, including which programs/measures and if any future EE work is in progress or planned*
 - *Includes number of applicants and number enrolled*
 - *If denied, include reason for denial*

Metric #5: ComEd response – one-time evaluation / analysis at year-end, then metric to be discussed. Working Group will hold a future follow-up discussion on scope, timing of analysis (estimated 2023 analysis; follow-up at the end of 2022).

5. *Analysis/data (exact metric TBD/to be discussed) on the financial impact on customers who receive both assistance and energy efficiency services (e.g., bill reductions, arrearage reductions, fewer disconnections, etc.)*

Metric #7: Sy Lewis to share information with ComEd on CEDA agency services

Additional follow-up:

- SAG Facilitator to circulate ComEd responses to metrics
- Deeper conversation on financial assistance needed in IQ Committee