

# Illinois EE Stakeholder Advisory Group Reporting Working Group

Wednesday, May 11, 2022 Meeting  
10:30 am – 12:00 pm  
Teleconference

## Attendees and Meeting Notes

### Meeting Materials

- Posted on the [May 11 meeting page](#):
  - [Wednesday, May 11 Reporting Working Group Agenda](#)
  - [ComEd Presentation to SAG Reporting Working Group](#)
  - [Initial Stakeholder ComEd Financial Assistance + EE Metrics Proposal](#)

### 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  
Annette Beitel, Future Energy Enterprises (IQ Committee Facilitator)  
Arvind Singh, DNV  
Billy Davis, Bronzeville Community Development Partnership  
Chris Neme, Energy Futures Group, on behalf of NRDC  
Christina Pagnusat, Peoples Gas & North Shore Gas  
Chris Vaughn, Nicor Gas  
Cynthia Segura, Citizens Utility Board  
Demi Charalab, Franklin Energy  
Dunni Cosey Gay, Community Investment Corp.  
Erin Stitz, Applied Energy Group  
Greg Ehrendreich, MEEA  
Haley Keegan, Resource Innovations  
Jennifer Morris, ICC Staff  
Jim Jerozal, Nicor Gas  
Karen Lusson, National Consumer Law Center  
Keith Goerss, Ameren Illinois  
Lamisa Chowdhury, NEWHAB  
Laura Goldberg, NRDC  
Matt Armstrong, Ameren Illinois  
Molly Lunn, ComEd  
Rebecca McNish, ComEd  
Stacey Paradis, MEEA  
Stephen Robinson, Northwest Austin Council  
Sy Lewis, Meadows Eastside Community Resource Organization  
Tina Grebner, Ameren Illinois

## Opening & Introductions

*Celia Johnson, SAG Facilitator*

Purpose of May 11<sup>th</sup> meeting: To discuss progress metrics for ComEd's EE/Financial Assistance efforts.

## ComEd Presentation

*Molly Lunn, ComEd*

- This discussion is focused on a Plan 6 stipulation on metrics for income eligible EE and financial assistance.
- It's somewhat early – ComEd does not have updates to share yet. Will share examples and some ideas about what we could report.
- Previously ComEd had a stakeholder engagement forum for Financial Assistance, and those meetings just restarted after a break. Interested parties welcome to join.
- Overview of stipulation language on income eligible EE and financial assistance; other agreements in income eligible EE/financial assistance section (see slides 2-3)

Excerpt from 2022-2025 ComEd Revised Stipulated Agreement:

*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 assistance 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.*
- Overview of existing income eligible metrics from stipulation (see slides 4-5). This is in addition to other reporting requirements from the Policy Manual.
  - "Financial assistance" includes LIHEAP, PIPP, other financial assistance programs available to ComEd low income customers

*[Laura Goldberg] It would be helpful to have a meeting where we could have EE and financial assistance staff both included.*

*[Molly Lunn] Agreed; would be happy to invite financial assistance to an IQ Committee meeting, or another forum.*

*[Karen Lusson] Important to have decision makers from the collections department regularly participate in the IQ Committee to break down the silos that exist between departments and to work at making the connection*

*between EE and payment issues. At the end of the day, in addition to improving comfort and safety, it's about trying to make bills affordable and reduce energy burden.*

*[Molly Lunn] To confirm, interested in connecting with both financial assistance and billing?*

*[Karen Lusson] Yes.*

*[Annette Beitel] IQ Committee meetings will be starting up. Would be more than happy to have joint meetings to talk about state of coordination between credit and collections, financial assistance and EE. Would be great as a joint SAG-IQ Committee meeting. May want to have a subcommittee if leadership is amenable. In northern IL, there has been a lot of interest in focused discussions on this topic.*

- Example: ComEd started testing some ways of proving assistance to customers. Included recent recipients of LIHEAP or PIPP that had not participated in EE, with high hardship/low participation ZIP codes. Sent over 100,000 customers different mailers and emails with details on programs – kits, retail discounts, and food bank. Analysis of engagement rates – open rate 43% and click of 3.5%. Over 3400 customers received kits. Learnings from the testing of the approach is something we are taking into account as we market and target going forward. Also sending materials targeting customers with “LICA” flag in our system that have received LIHEAP or PIPP. More work to do with financial assistance team on touchpoints that we could be providing this to customers. For programs like LIHEAP, customers are often going to a Community Action Agency, and customers are hearing about both LIHEAP and weatherization at the same time. Ideally Agencies will talk to customers about both opportunities.
- Example: Providing financial assistance info to EE program participants. When customers participate in income eligible EE, the outreach for financial assistance is pretty significant. Assessment reports and kits include financial assistance options. Same with home weatherization. For most of our programs we have worked that into how we deliver the EE programs.
- Possible metric could be the number of brochures we send out or other ideas.

*[Annette Beitel] Repeating a question from an IQ leadership member – qualifying for one program and automatically qualifying for other programs? Concern about having to submit duplicative paperwork. Streamlining the process.*

*[Molly Lunn] Good question. Deserves a more in-depth answer and we can do that in a follow-up discussion. Challenge is that in some cases the qualifications don't quite line up. Easier to qualify for EE programs. If they have a LICA flag, we know they qualify so we'll send a kit. Using qualification forms across programs needs further discussion. Would be helpful to include DCEO representative.*

- Online resources update: We had a longtime IE EE section on ComEd's website, started adding a way that customers could get to financial assistance from that page. This fall

we launched Smart Assistance Manager customer tool to help with energy decisions comprehensively – not just EE, not just financial assistance, includes demand response, and budget billing and lots of opportunities for customers to take advantage of. Customers answer some questions and we pull in the information we have about them, and it generates suggestions tailored to that customer. There is a lot we can report out on number of customers and what it results in for conversion to program uptake.

*[Laura Goldberg] This tool is exciting and a good model. Is there also a phone service that can help with some of this streamlining?*

*[Molly Lunn] Ideally our call center would walk a customer through that range of options. We could have further discussion on calls that go through other Agencies – have heard that from our partners, just want to think about how that streamlining looks for people who can't use an online tool.*

*[Billy Davis] There are obstacles due to the digital divide – is it phone optimized?*

*[Molly Lunn] Designed for phone access, can confirm in a follow-up discussion.*

*[Jennifer Morris] Circling back to an earlier question, can you explain what would be discussed in an IQ Committee meeting related to financial assistance?*

*[Molly Lunn] Discussing disconnections needs to be in the ComEd financial assistance forum I mentioned [meets quarterly]. A SAG or IQ Committee discussed could focus on when EE and financial assistance are working together, how to make sure that we are delivering them at the same time, questions about qualification and access, etc.*

*[Chris Neme] Questions on the Smart Assistance Manager Tool. It sounds like a neat innovation. What are you doing to get the word out that it is available to the customers?*

*[Molly Lunn] Will follow-up with more information. Social media, promoting through Community Action Agencies are examples.*

*[Chris Neme] Regarding customers not wanting to apply multiple times for multiple programs, is this a mechanism where their determination of eligibility could also be done with this tool?*

*[Molly Lunn] The challenge is there is a fair amount of documentation required for financial assistance, so not sure this system can be used for everything but I think it could be used in some manner, for example a self-qualifying program where income verification isn't required.*

*[Annette Beitel] An issue that came from IQ Committee leadership – customers they wanted to refer to LIHEAP and IHWAP and couldn't find an organization that was open and could help the customer based on their location. Is there a list available?*

*[Karen Lusson] DCEO has a statewide list. Also, the CEDA website is broken down by Chicago South, West, North, then it lists name of each agency and phone number and hours. But not addresses. Perhaps ComEd might reach out to CEDA and also suggest fixing that issue.*

*[Karen Lusson] Everything in these slides is good. It's also important for ComEd to reach out to groups like COFI and ask for feedback on the best way to get information to people. Perhaps, to start with, have a ComEd rep join a regular COFI meeting to spread the word about programs. Ask the question: Are there places in neighborhoods that would be a good place to host a community meeting to discuss programs and how to enroll or access both EE and affordability programs? That kind of thing. Ask the experts -- the people in communities. It needs to be a 2-way conversation.*

*[Laura Goldberg] We may want to also have a discussion on at a future SAG + IQ EE Accountability meeting about the ComEd tool. It doesn't seem to direct to a specific EE program. It does seem to suggest some specific assistance programs, but for EE it seems to just link to ComEd's rebate page.*

- **Additional ComEd Updates**
  - Mapping and targeting: We have started some amount of targeting based on data we have. We spent time in Q1 working on a comprehensive dataset so we can run analytics and overlay with our EE participation. We've done some of that with LIHEAP and arrearages, but never data for the whole territory. To date, we've found good correlation that areas that need the most financial assistance are also getting the most out of EE/weatherization programs. We will probably identify some pockets that are being missed. Especially outside of the top 20 zip codes and the city of Chicago. We have the data and we're developing some maps and ideas about targeting in the next couple of quarters.
  - Pilot for connecting customers: Very early. We commissioned research under R&D on what other utilities are doing, more examples than the 1 or 2 we had. That's being conducted right now to inform what we do in a pilot. IQ Committee could be a great forum to discuss this. We have some ideas, open to more.

## **Stakeholder Metrics Presentation**

*Laura Goldberg, NRDC*

- Some of these might look familiar – we used some of the originally proposed metrics from the creation of the stipulation and worked forward from that. Speaking on behalf of larger group of stakeholders.
- #1: Better understanding of the number and percentage of customers receiving bill assistance that were referred to EE
  - Number of customers, broken down by program and SF/MF
  - By population of bill assistance customers
  - By ZIP codes or census tracts.
- #2: the analogous opposite side, how many EE participants were referred the other direction
  - By SF, MF, census tract and/or ZIP

- #3: better understanding what programs and measures were recommended in #1 – implementer who recommended and type of referral or recommendation (email, flyer, hand holding, etc.)
- #4: Number or percentage of customers who were referred to EE and followed through
  - What programs and measures, what's in the queue for the future if they haven't been implemented yet. Number of applicants, reasons for denial

*[Karen Lusson] This should also break down by single family/multifamily – e.g., problems with building owners not choosing to participate.*

*[Molly Lunn] Property owner is going to have to make the decision on comprehensive EE projects – we can do tenant kits and rebates, but we can't get them to get their landlords to do a project. From a reporting standpoint that would be very challenging to track.*

*[Laura Goldberg] Other utilities have had these challenges as well – such as in Michigan. Let's discuss what we can do with a 100-unit building where everyone is on assistance, how can we flag that to outreach to the landlord. That's a challenge and we should discuss some of the ideas that have come up.*

*[Molly Lunn] If we were going to report today, MF retrofits wouldn't be here right now because we're not trying to do that conversion from MF tenant to MF retrofit currently.*

*[Laura Goldberg] Does billing track customers by SF/MF?*

*[Molly Lunn] Not sure we're going to be able to track all of the data. Will discuss internally.*

*[Karen Lusson] "Customers" is also defined as the building owner, especially for master metered buildings. If a building owner was approached in the MF program, what was the issue that made them disengage?*

- #5: A request for analysis and data (metric TBD) on the financial impact on customers who receive both assistance and EE. Understanding of what the impact of the streamlining is.

*[Molly Lunn] Is this one we would keep talking about and try to work out in Q2?*

*[Laura Goldberg] We recognize that some of them are clearly implementable now, and others we need to talk about how we can measure them. A better understanding of what the data ComEd has will help inform this.*

*[Molly Lunn] This type of metric is not only a data question, it's complicated. It may or may not have an impact on arrearages that don't have to do with EE – like the economy. A metric like this is going to warrant a deeper discussion on data, what other utilities have done, do we need to have an evaluator involved to be able to say that "X happened because of Y." I think we need to keep talking about this, maybe not ready for Q2.*

*[Laura Goldberg] Agreed on that point. Interested to better understand what is possible.*

*[Karen Lusson] Will ask LEAN in Massachusetts for any suggestions.*

- #6: Narrative updates on current efforts – like what happened today – and future planned updates.
- #7: Number of locations available for IQ EE and assistance – days and hours available. Information need rather than a metric and relates to discussions today of website. How to streamline this and get people the information.
- #8: Description of how company will increase outreach in top 20 disconnection ZIP codes, presentations, materials, organizations, etc.

*[Molly Lunn] We're going to want to talk through this one. It's a question too of those ZIP codes where we have been getting good uptake. For example, there is a large amount of weatherization in zip codes we have been targeting. But does that mean we need to be increasing it still there and not be focusing on other areas in the territory? We need to talk about that premise, what is meant by increasing outreach considering limited funding.*

*[Laura Goldberg] This pairs with the better understanding of the uptake in those communities. I think the intent is generally increasing outreach, maybe the top 20 are already covered and there are others we need to target too. Worth future discussion.*

*[Karen Lusson] In terms of the uptake in those communities, that's good to hear. Sounds like more is needed. To the point of outreach beyond those communities, does that uptake in the top 20 include the state weatherization program?*

*[Molly Lunn] That includes only our data – we don't have the state's data on the programs that are solely funded by them. We only have the data on the utility funded projects and the braided projects.*

## **Closing & Next Steps**

*Celia Johnson, SAG Facilitator*

### **Next Steps**

- **Initial Stakeholder Proposed Metrics:**
  - ComEd to review and discuss internally
  - Follow-meeting Reporting Working Group meeting in June with ComEd's response to the initial stakeholder metrics
    - Deeper dive discussion or additional research may be needed – such as proposed metric #5 (analysis / data on the financial impact on customers who receive both assistance and EE services)
      - Karen Lusson will follow-up with Low Income Energy Assistance Network (LEAN) in Massachusetts for suggestions
      - Laura Goldberg will look into examples from other jurisdictions
    - Additional discussion needed on proposed metric #8 (description of how the company intends to increase outreach in top 20 communities with

disconnections) – should outreach be increased in top 20 communities; what does increasing outreach mean; stakeholders interested in better understanding on uptake in top 20 communities

- **ComEd Financial Assistance Forum:** ComEd will share stakeholder contact information from SAG Reporting Working Group to join ComEd's Financial Assistance Forum (Celia to send stakeholder contacts to Molly). Next meeting planned in August.
- **IQ Advisory Committee:** There is interest in the utilities inviting financial assistance and billing representatives to participate in a future IQ Advisory Committee meeting / joint with large group SAG. Celia and Annette to coordinate.
  - Follow-up ideas for future joint meeting:
    - How EE/financial assistance work together
    - Co-delivered EE/financial assistance pilot – updates and brainstorming suggestions
    - Better understanding of ComEd's Smart Assistance Manager (SAM), and sharing feedback on connecting with EE opportunities
    - If a customer qualifies for one program, do they automatically qualify for others, or do they have to resubmit paperwork? There is interest in better understanding this, and brainstorming on customer qualification solutions.
    - Community outreach needs and ideas on EE/affordability/financial assistance