

**Illinois Energy Efficiency Stakeholder Advisory Group
Large Group Meeting:
Joint with Income Qualified EE Advisory Committee
Monday, November 16, 2020
10:30 am – 3:30 pm
Teleconference Meeting**

Attendee List and Meeting Notes

Meeting Materials

- Meeting Page: [Monday, November 16](#)
- [Monday, November 16, 2020 Agenda](#)
- [IQ South Next Steps on CBO/CAA Feedback](#) (IQ South Advisory Committee Facilitator)
- [Municipal Pathways for IQ Program Delivery – Feedback to ComEd, Nicor Gas, Peoples Gas and North Shore Gas](#) (Metropolitan Mayors Caucus)
 - [Feedback Template from Metropolitan Mayors Caucus](#)
- [Energy Efficiency for All – Feedback to All IL Utilities](#) (People for Community Recovery, Natural Resources Defense Council, Community Investment Corp., Citizens Utility Board)
- [Initial Feedback to All IL Utilities on 2022-2025 EE Plans, Income Qualified](#) (Non-Financially Interested Stakeholders)
- [Initial Feedback to All IL Utilities on 2022-2025 EE Plans, Non-Income Qualified](#) (Non-Financially Interested Stakeholders)

Meeting Attendees

Celia Johnson, SAG Facilitator
Samarth Medakkar, Midwest Energy Efficiency Alliance (MEEA) – Meeting Support
Abigail Miner, IL Attorney General's Office
Adam Fields, Ameren Illinois
Adam Householder, Franklin Energy
Aimee Gendusa-English, Citizens Utility Board
Allen Dusault, Franklin Energy
Amalia Hicks, Cadmus Group
Amy Jewel, Elevate Energy
Andrew Cottrell, Applied Energy Group (AEG)
Andrew Rains, IACAA
Andrey Gribovich, DNV GL
Andy Odom, Community Contacts
Andy Vaughn, Leidos
Angie Ostaszewski, Ameren Illinois
Angie Ziech-Malek, CLEAResult
Annette Beitel, Future Energy Enterprises, IQ South Facilitation
Anthony Santarelli, SEDAC
Arvind Singh, DNV-GL
Ashley Bennett, Franklin Energy
Ashley Palladino, Resource Innovations
Atticus Doman, Resource Innovations
Blaine Fox, CMC Energy
Bob Baumgartner, Leidos
Brandon Pieczynski, Pangeare
Brett Bridgeland, Slipstream
Bridget Williams, Guidehouse
Brittany Zwicker, CLEAResult

Bruce Liu, Nicor Gas
Bruce Montgomery, Energy Solutions
Cate York, Citizens Utility Board
Cathy Mrase
Chanda Rowan, Nicor Gas
Cheryl Johnson, People for Community Recovery
Cheryl Scott, Metropolitan Mayors Caucus
Chester Kolodziej, Sustain Rockford
Chris Neme, Energy Futures Group, on behalf of NRDC
Chris Vaughn, Nicor Gas
Christina Pagnusat, Peoples Gas & North Shore Gas
Clayton Schroeder, Nexant
Courtney Hanson, People for Community Recovery
Craig Catallo, Franklin Energy
Cynthia Segura, Metropolitan Mayors Caucus
Dani Blackard, Ameren Illinois
Dantawn Nicholson, ComEd
Dave Hernandez, ComEd
Deb Dynako, Slipstream
Deb Perry, Ameren Illinois
Denise Munoz, ComEd
Diana Fuller, IACAA
Domingo Miranda, ComEd
Drew Samuels, Nexant
Edith Makra, Metropolitan Mayors Caucus
Elena Savona, Elevate Energy
Emma Salustro, ComEd
Eric O'Neill, Michaels Energy
Foluke Akanni, Citizens Utility Board
Frank Schulmeister, Energy Sciences
Fred Wu, AiQueous
Gabriel Duarte, CLEARResult
Gina Melekh, Franklin Energy
Grace Wroblewski, AEG
Grant Snyder, IL Attorney General's Office
Greg Ehrendreich, MEEA
Haley Keegan, Resource Innovations
Hanh Pham, Willdan
Hannah Howard, Opinion Dynamics
Harsh Thakkar, Franklin Energy
Heidi Gorrill, Slipstream
Jackie Nagel, Nicor Gas
Jacob Stoll, ComEd
James Heffron, Franklin Energy
Jane Colby, Apex Analytics
Jared Policicchio, City of Chicago
Jason Fegley, Ameren Illinois
Jean Ascoli, ComEd
Jean Gibson, Peoples Gas and North Share Gas
Jennifer Morris, ICC Staff
Jenny George, Leidos
Jerad Wiskus, Franklin Energy
Jessica Williams, Green Home Experts
Jim Dillon, Ameren Illinois
Jim Fay, ComEd
Jim Heffron, Franklin Energy
Jim Jerozal, Nicor Gas
John Pady, CEDA
John Carroll, Leidos

John Lavalley, Leidos
Jon Gordon, Enervee
Jonathan Kleinman, AiQueous
Jordan Berman-Cutler, ComEd
Julia Friedman, Oracle
Julie Hollensbe, ComEd
Kalee Whitehouse, VEIC (TRM Administrator)
Karen Lusson, National Consumer Law Center
Katherine Elmore, Community Investment Corp.
Kathia Benitez, Franklin Energy
Kelly Gunn, ComEd
Kevin Dick, Delta Institute
Kevin Grabner, Guidehouse
Koby Bailey, Peoples Gas & North Shore Gas
Kristen Kalaman, Resource Innovations
Kristol Simms, Ameren Illinois
LaJuana Garrett, Nicor Gas
Lalita Kalita, ComEd
Lamisa Chowdhury, NRDC
Lance Escue, Ameren Illinois
Larry Dawson, IACAA
Laura Goldberg, NRDC
Lauren Casentini, Resource Innovations
Lauren Gage, Apex Analytics
Lawrence Kotewa, Elevate Energy
Leanne DeMar, Nicor Gas
Lisa Miranda, Rebuilding Together
Lorelei Obermeyer, CLEAResult
Madeline Caldwell, CLEAResult
Mallory Audo, Leidos
Maria Onesto Moran, Green Home Experts
Mark DeMonte, Whitt Sturtevant, on behalf of Ameren IL
Mark Johnson, Steptoe & Johnson, on behalf of ComEd
Mark Milby, ComEd
Mark Szczygiel, Nicor Gas
Marsha Belcher, Community Action Partnership of Lake County
Mary Ellen Guest, Chicago Bungalow Association
Mary Johnson, Resource Innovations
Matt Armstrong, Ameren Illinois
Maurice Kaiser, Honeywell
Michael Frischmann, Ecometric Consulting
Michael Pittman, Ameren Illinois
Mike King, Nicor Gas
Molly Lunn, ComEd
Naomi Davis, Blacks in Green
Nate Baer, Staples Energy
Nick Dreher, MEEA
Noelle Gilbreath, Community Investment Corp.
Omayra Garcia, Peoples Gas & North Shore Gas
Patricia Plympton, Guidehouse
Peter Brown, Lighting Transitions
Philip Mosenthal, Optimal Energy, on behalf of IL Attorney General's Office
Ramandeep Singh, ICF
Randy Gunn, Guidehouse
Randy Opdyke, Nicor Gas
Rebecca McNish, ComEd
Rick Tonielli, ComEd
Rob Neumann, Guidehouse
Ryan Kroll, Driftless Energy

Salina Colon, CEDA
Sam Dent, VEIC (TRM Administrator)
Sam Stahl, Ameren Illinois
Scott Fotre, CMC Energy
Scott Marnier
Scott Yee, Resource Innovations
Sharon Louis
Sharon Sy Lewis, Meadows Eastside CBO
Shelita Wellmaker, Ameren Illinois
Sophie Berne, Guidehouse
Stacey Paradis, MEEA
Steve Green, Oracle
Tamaira Jackson, Ameren Illinois
Ted Weaver, First Tracks Consulting, on behalf of Nicor Gas
Thomas Drea, Ameren Illinois
Tim Melloch, Future Energy Enterprises
Tisha Burnside, Resource Innovations
Tyler Barron, Environmental Law & Policy Center
Victoria Nielsen, AEG
Vincent Gutierrez, ComEd
William Davis, Bronzeville Community Development Partnership
Yami Newell, Elevate Energy
Zach Froio, AEG
Zach Ross, Opinion Dynamics
Zenita Montero Chang, ICF

Meeting Notes

Follow-up is indicated **in red** within the notes.

Opening & Introductions

Celia Johnson, SAG Facilitator; Molly Lunn, ComEd; Annette Beitel, Future Energy Enterprises

Meeting purpose: The purpose of the Nov. 16-17 meetings is to discuss initial feedback on preliminary draft EE portfolios for 2022-2025, presented by Illinois utilities during the Oct. 26-27 meetings.

- Today's meeting will start with a focus on income qualified feedback for all utilities. Then we will discuss utility-specific, non-income qualified feedback. After the 2-day meeting this week, discussions and negotiations will be ongoing.
- Everyone should feel free to share feedback during the meeting.
- Goal is for conceptual agreement to be reached with negotiating parties by January 15, to finalize stipulated agreements with utilities by end of January. Utilities file EE Plans with the ICC on or before March 1, as required by statute.
- *Molly Lunn, Introduction to IQ North Committee:* We will work with the IQ North Committee to set up small group conversations to discuss feedback today. Excited to continue having conversations.
- *Annette Beitel, Introduction to IQ South Committee:* As stated in previous Oct meetings, we have Executive Directors from CBOs and CAAs that would like to approach feedback differently. We are meeting on November 30, where CBO and CAAs will present feedback on plans. Utility responses will be shared in real time.

IQ South Advisory Committee: Next Steps on CBO and CAA Feedback

Annette Beitel, Future Energy Enterprises, IQ South Advisory Committee

- As I mentioned in the last SAG meeting, we had several small group meetings with directors of organizations, both CAAs and CBOs from Nicor and Ameren territories. Subsequently, we received feedback – limit meetings to 2 hours. Also, it was important that they present feedback and receive immediate utility response and discussion. There will be a separate IQ-S meeting in late November, including small group breakouts. We will limit invitees so we have an intimate group. These will include non-financially interested stakeholders, implementers, CBOS, CAAs and utilities.
- When we hosted small group meetings, we asked for feedback on goals of portfolio and ideas from SAG planning process, including both North and South ideas. A lot of the ideas from the SAG process were well received by CBOs and CAAs. IQ-N idea, porch light program, was very popular.
- Final thought: Collaboration is key. Ameren and Nicor are guided by input from CBOs and CAAs. Hopefully non-financially interested parties see the feedback as being primarily important.

Feedback from Metropolitan Mayor's Caucus: Municipal Pathways for IQ Program Delivery

Edith Makra and Cynthia Seguro, Metropolitan Mayors Caucus

- Presenting feedback on municipal pathways for IQ delivery – northern IL utilities
- Municipalities can offer impactful communication channels. Plan 6 does not leverage this capability. Municipalities should play a role in facilitating outreach to income IQ communities. For example, municipalities can integrate IQ program component to public engagement programs. Every community is a member of the Metro Mayor's Caucus.
- Caucus also leads the largest sustainability collaborative in the region, the Greenest Region Compact. 132 municipalities have endorsed the Greenest Region Compact. There is a lot of interest and opportunity at the municipal level to integrate energy efficiency programming.
- When discussing optimizing impact and programming it's helpful to understand gap in delivery and how they're being tracked. Likely, Mayors' offices will have channels to address gaps. Citizens sustainability commissions are an opportunity, they function like CBOs. Often, commissions act in similar capability as CBOs. They offer accountability and accessibility.
- Example: City of Elgin Sustainability Commission. Involved in overseeing sustainability action plan, knowledge center, community educational events to engage residents. When looking through CBOs active in IQ North, strong majority are based in city and Mayor's Caucus is able to reach them. Particularly the income qualified communities within the suburbs of Chicago.
- There are a lot of communication channels that municipalities have that aren't being used here.

- The municipalities have a lot of experience with EE delivery in public sector. Untapped potential to reach residents, and this caucus serves over 8 mil residents.

Feedback from Energy Efficiency For All (EEFA)

Laura Goldberg, NRDC; Cheryl Johnson, People for Community Recovery; Katie Elmore, Community Investment Corporation; Foluke Akanni, Citizens Utility Board

- [Laura Goldberg]: IL EEFA is a part of a larger national project, with 12 coalition partners. We are focused on increasing EE and renewable energy, water in affordable MF housing. Focused here so under served BIPOC communities, marginalized, can benefit equitably from advantages of EE. Focused on MF because this is typically an underserved sector. Some research put here in our background. MF units typically get 4-5 less features than other types of housing. Ensure that MF building owners and renters have access – preserve affordable housing, reduce cost of living and health.

Overarching Feedback on IQ Sector from EEFA

- [Cheryl Johnson]: Concerned about the workforce development piece. Critical to success of the IQ programs. We have an energy burden. In order to get community understanding of EE goals, provide edu and training to have a workforce development piece. BIPOC communities tend to be at a disadvantage and workforce must come with wraparound services.
 - Stipends, childcare, transportation, and other critical needs that may arise. Once you get into the workforce, people tend to have more interest seeing folks in their own community working on clean energy.
 - EE needs to be the first type of training. Not only the consumption of energy, but also to deal with infrastructure. We need to have the ability to intercept other trades outside electrical to make EE possible for the infrastructure issues. Wx helps, but doesn't give struggling communities the full suite of benefits.
 - Our community isn't fully aware of EE because of other survival priorities. If we can show communities what it means to be efficient and what the benefits are.

[Kristol Simms] When the utilities have job opportunities available on program, can you think of the best way to communicate these opportunities to communities?

[Cheryl Johnson] Advertisement in the community, but also network with CBOs in the vicinity to do the outreach and recruitment of folks. Communities are dealing with trust issues with utility. Relationship has been mostly financially related.

[Molly Lunn] It sounds like workforce training for folks in your community and similar communities. To do the outreach and more project-based work?

[Cheryl Johnson] Look at the CBOs doing outreach for recruitment of training. We can do the assessment and find the best qualified fit and connect them to appropriate program.

- [Laura Goldberg]: We are happy to see interest from utilities in stronger workforce development practices. Looking for more detail and working out next steps. Interest in

having a SAG/IQ joint workgroup on equitable hiring and workforce development. These are ongoing conversations.

- For NRDC, NCLC and BIG proposal on equity hiring [through SAG Planning Process], we outlined format of the recent equity workforce meeting (SAG/IQ), held recently, and we should continue to bring experts to the table to have best practices come to light.
- [Karen Lusson] We want to acknowledge Ameren's leadership in building more equity in the workforce. Serves as a good example for other utilities. Going forward, we would like to see a specific plan in place, through the MT budget, that includes a separate program budget to create a workforce development program, ensuring minority contractors are aware of opportunities. Also, review tier 1 and tier 2 contracts to be available for minority contractors. More transparency in negotiations with how utilities produce these contracts. The utilities should work with stakeholders, percentage points awards, to ensure diverse contractors are not shut out. Develop more local, Black and Brown-owned businesses. Create an even playing field. We think there needs to be, as one contractor mentioned, a continuum of care – mentoring, expected growth, understanding that there will be growth over the 4-year plan period. The workforce development plan should not be overseen by a potential competitor. We think it's important that diverse contracts are one with utilities, as opposed to with a contractor – in some instances, contracts are with competitors. Finally, we think progress on minority contracting hiring and workforce development should be tracked and evaluated by a separate evaluator outside portfolio evaluation – an expert in work force development evaluation. Interested in talking more about this.
- We want to acknowledge it's difficult for CBOs to be talking to utilities about efficiency in the middle of people getting disconnected. As we get more groups involved, we have to be mindful of the dual faces of the utilities. A lot of people interact with utility when getting disconnected. Energy assistance needs to be paired with energy efficiency programs. We are happy to see utilities say they want to connect these functions. We have to acknowledge that this is a barrier to EE.
- We would love to figure out better ways to measure utility affordability. We know that a lot of utility presentations did not get to this level of detail, but figuring out ways to report and track energy burden affordability, etc.
- Connections with low income solar: We know these programs are another resource for IQ communities. Referrals between IQ EE programs and Solar For All. Beneficial to both programs. Adding solar feasibility to energy audit; R&D pilot with LI solar for all.

[Kristol Simms] Do you have examples of where LI solar activity is occurring with other utility companies?

[Laura Goldberg] We explore these in our ICC Notice of Inquiry on affordability comments; will follow-up.

[Jennifer Morris] An ICC report on the affordability Notice of Inquiry is expected at the end of this year. If there are items related to EE, it may make sense for SAG to address,

[Kristol Simms] On tiered contracting, it would be helpful for us to understand the perceived benefits of a vendor being tier 1 vs tier 2, because sometimes, from a utility

perspective, it's a benefit for the vendor to be tier 2 vs tier 1. We want to clear up what the benefits are for being a vendor at various tiers.

IQ Multi-Family Feedback: High Level Overview

- Program Budgets: Comparison between this plan budget and last plan. Are there projected units/buildings serve yet within these budgets?
- True one stop shop
- Ensure correct placement of customers in correct IQ track.
- Co-delivery. Ensure that programs are jointly delivered wherever possible. Disclose where this is happening and where the challenges are.
- 2-3 flats
- Health and Safety
- Reporting – better understand reporting and data collection for IQ and IQ MF programs.

MF Feedback for Ameren Illinois

- We're glad to see Ameren's commitment to the one-stop-shop approach. We want to ensure the definition aligns with best practices of a one stop shop. This means ensuring robust incentives and savings.
- We saw Ameren's projected IQ savings are low and we want to understand why. What programs are included and at what rebate levels?
- NRDC submitted a proposal about increasing budget for MF. The proposed \$2 million may not be sufficient for deep investment in IQ MF.

MF Feedback for ComEd

- We took note of the section on IQ targeting and we would like more clarity on what this means. Does this reflect a different eligibility or more targeted delivery? We want to make sure that the agreed upon eligibility in policy manual is still used. Changes to eligibility criteria proposed.
- Same area of plan – shifting residential EE budget to IQ – what will trigger this and what will that look like? Need clarity.
- Pleased to hear that ComEd acknowledges some participants are routed to MR instead of IE. Avoid miscategorized customers so they get the right incentive.
- Health and Safety – we need more information on whether we'll be able to expand funding under these programs and what that'll look like.
- Connection between energy assistance and energy efficiency, credit and collection. We'll need more data collection and analysis to understand how EE is impacted affordability. We see EE as a tool for preserving AMF.
- We want to make sure we have robust joint deliver with PG/NSG and Nicor. I've heard we run out of gas funding sometimes, so we'd like to hear more about where the short-comings are in joint delivery.
- Overall, we're pleased to see ComEd's commitment to IQ spending and considerable proposed increase.

[Molly Lunn] We should have more conversation on targeting vs eligibility. We have a limited amount of funding, even though we're increasing the IQ MF budget. We want to better serve our lowest income customers. Those on the higher end may not get as deep an offering as those in most need. We don't want to turn people away at all, but we are talking about moving beyond just targeting, we want to have the eligibility for IQ portion be a higher level of income eligibility because we want to make sure the deepest retrofits are going to those who need it the most. Interested in following up.

[Karen Lusson] Do you have a set percentage or AMI figure or FPL in mind where you would end cost-free incentives? At what point would there be co-pays?

[Molly Lunn] We have not established a similar threshold for SF as MF. It would be less about changing the percent income an actual customer eligibility, policy manual allows us to work in zip code (50% of residents in zip need to be below 80% AMI) and we discussed 60%, so we're targeting specific areas. That doesn't mean customers in the 50% and below, would be served in market rate. And if they met the IHWAP criteria, that could work too. One option would be to focus on customers in certain zip codes.

[Laura Goldberg] The main concern is that we know there's a lot of naturally occurring affordable MF housing. Ensuring that buildings don't get lost in shuffle, but we agree with the intent and want to discuss more.

[Cate York] Understand the desire to target the households with most need, is there any way to provide more insight into the contractor incentive and contractors on competing programs? Any way to address this on the contractor level?

[Molly] I think that's part of what we're hoping to address. I don't think addressing through contractors alone will address where we're seeing low participation in LI program. In LI program, we're seeing that participants are not in the highest need areas. Could be due to health and safety issues. Open to discussing more.

MF Feedback for Nicor Gas

- IQ Funding: Need clarity on funding levels. NRDC had a proposal of 30% of IQ going to MF. And how does the current budget compare to the proposed budget?
- Program design: More detail on design of MF program.
- Healthy homes: Happy to see this mentioned. Hope to ensure MF is included.
- Co-delivery: Interested in better understanding co-delivery with Ameren and ComEd

MF Feedback for PG/NSG

- Similar feedback as for Nicor.
- Clarity on funding levels for IQ MF.
- Clarity on co-delivery activity with ComEd and program design for IQ MF.

Feedback on Income Qualified Programs (All Utilities)

Non-Financially Interested Parties

Phil Mosenthal, Optimal Energy, on behalf of the IL AG's Office, and other interested parties

- Presenting on behalf of non-financially interested parties, including NRDC, CUB, NCLC, AG office and City of Chicago.
- This is high-level feedback
- We haven't delved into all details and we haven't viewed all the batch files, so we expect to have other comments.
- There are some points that will be discussed that don't have full backing from all parties represented today, but these are broad comments.

IQ Suggestions Across All Utilities

- We're supportive of efforts to increase budgets, with increased focus on whole building and IQ work. Despite this, we're still interested in seeing more budget for IQ, given the need.
- We want to see an equitable distribution of SF and MF, mirroring service territories.
- We would like to see all programs that can be joint be delivered jointly. By this we mean the single point of contact, one-stop-shop approach. They should be bringing all efficiency service opportunities. Joint contracting is one method. This doesn't really apply to the braided programs, like IHWAP.
- Would like to see maximum braiding of programs with IHWAP.
 - We haven't defined a specific target budget for each utility, we need to better understand this. There have been concerns with the ability for CAAs to ramp up, but we want to see more coordination.
 - [Annette Beitel] Views on increasing budget – we've had many discussions with CBOs and CAAs, who've contributed their views. This includes increased IQ budgets and other goals for IQ funds. They are also interested in having other issues addressed, like health and safety. Coordinating with CAAs is happening within IQ South Committee.
 - [Molly Lunn] Agreed on more engagement needed [for IQ North] with CAAs and CBOs on their capacity and capabilities. This is why we're engaging one-on-one meetings with CBOs and CAAs, and hopefully this will lead to fruitful conversations leading up to the implementation of plan 6.
- [Karen Lusson] Would like to see utilities working directly with Community Action Agencies on budgeting, etc.
 - [Karen Lusson] What we've seen in the past is the utility only programs are not as comprehensive as the braided program. We would like to diminish confusion. Make sure that if there's going to be utility only Wx, it should mirror the state program.
- Would like to see all cost-effective measures in a building that utilities are working in – as opposed to touching as many customers as possible. Although this shouldn't change priority for reaching more customer, but means more emphasis on whole home measures, and less home energy reports and kits.
- Ensure MF is fully funded with a single point of contact, considering the challenges between building owners.
- In at least one utility, we saw a decrease in public housing budget, and we'd like clarity on why this was decreased.

- Ameren IL is interested in understanding the suggestion to reduce kits. CBOs and CAAs see kits as an opportunity to connect with their customers and communities.
 - [Karen Lusson] As we've mentioned, the programs will benefit, and more customers will benefit, if those delivering programs are closest to the communities are being served. Connect with energy affordability data we have.
 - We support targeting those most in need. But we don't want to restrict eligibility to only those customers. We need more clarity on ComEd's approach to targeting.
 - Focus on areas with high energy burden, high arrearages and disconnection rates.
 - [Karen Lusson] We now have the data, utilities are required to file monthly data on disconnections, deferred payment arrangements and deposits. We're seeing that the EE department can no longer operate in a silo, and not have an understanding on the ground of who's being disconnected. We are pursuing minimizing disconnection and decreasing energy burden, and that has to be the mission of energy efficiency. If there are disconnections happening, it's difficult to engage customers. We can't separate the two missions of assistance and efficiency.
 - Ameren Illinois to follow-up on actions to connect EE and disconnections.
 - [Emma Salustra] There were questions raised at IQ-N Committee meeting. ComEd has not been disconnecting people identified as low-income throughout this pandemic. No one receiving LIHEAP or PIPP have been disconnected.
 - [Aimee English] Concerns about disconnection weave their way into CBOs and CAAs you're trying to work with. It's a barrier to EE.
 - Third Party Programs: A provision in FEJA for electric utilities. ComEd made a comment about having a high number in current program. Now they're interested in focusing, narrowing down. Concern's around stifling creativity and innovation – the point is to see innovation from the market. We'd like to see community based approached to serving SF and MF IQ.
 - R&D tends to be more research and pilot oriented, whereas 3rd party programs can be more full-scale.
 - We support competitive bidding for implantation contracts, increased focus on diverse and community-based contractors.
 - Greater targeting of electric resistance heating for conversion to heat pumps. Electric resistance is expensive and common in IQ buildings. Also, this would be an opportunity in growing contractor understanding of installing heat pumps.
 - Allocate a portion of R&D funds to go to the IQ sector programs.
 - Gas utilities should shift some R&D and MT funds to IQ programs and diverse hiring goals.
 - Also, less emphasis on large gas equipment and more on building shell improvements.
- [Naomi Davis] We have a special interest in heat pumps. We have a special interest in fuel switching and the role of CBOs in climate change. In support of the changes recommended in the policy and practices on the ComEd side and the trade ally side, as well as manufacturing and other 3rd party vendors.*

[Jim Jerozal] Clarification about heat pumps. Phil, is this comment suggesting that the group is focused on converting only electric resistance buildings to heat pumps? And Naomi, are you suggested converting gas customers to electricity?

[Naomi Davis] Yes. Interested in how communities are benefited specifically, how community residents can understand this transaction, and how this new economy that we are encouraging in our own communities. What does that implementation look like? Capacity building and neighborhood-based businesses. But we have a lot of education and system wide changes that many of us think are fundamental before driving more business to electric utilities.

[Phil Mosenthal] The bullet specifically is not referring to fuel switching. Not sure if I can affirmatively state that all parties represented here are in full agreement with electrification and fuel switching. There may be challenges right now where it may not be cost effective. But this is a future likely we'll see, and there's more work to be done to bring prices down and ensure that service providers know how to install them. And resistance heating is an opportunity to begin this.

[Chris Neme] We know from the work with Ameren, and ComEd, that in the IQ MF sector, there is a lot of inefficient electric resistance heat, especially in Ameren's territory. The single biggest thing you can do to help these customers with their bills would be to displace as much resistance heat with heat pumps. And we can learn a lot in the process.

[Jim Jerozal] Speaking for Nicor Gas – we'd love to have an ongoing conversation on how we collaborate on hybrid strategies in a future that has electrification opportunities, but also, as we start thinking about gas customers, hybrid solutions there too where they make sense.

Feedback on PG/NSG Preliminary 2022-25 EE Portfolio (Non-IQ)

Non-Financially Interested Stakeholders

Chris Neme, Energy Futures Group, on behalf of NRDC, and other interested parties

- These items may not have full consensus from non-financially interested parties.
- While we're proposing things that would require shifting program aspects, we do not support shifts away from IQ resources.
- Primary follow-up questions are indicated in red font in slides.
- With respect to savings goals, we need to do more review of batch files before drawing conclusions on reasonableness. In terms of allocations, wanted to flag that we appreciate the effort to increase the IQ budget, but we want to explore opportunity to shift some C&I budget to residential non-income qualified. With regard to C&I programs, support midstream CFS equip program that all utilities are interested in.
- Main concern is why small Biz DI (direct install) not jointly delivered w/ComEd program. This should maximize costs.
- On residential non-IQ programs, we want to discuss expanding the range of the air sealing pilot at time of jumpstart audit.

- We question the proposed increase in furnace rebates and the fact that rebates for smart thermostats are not joint, in northern Illinois (where possible).
- Pilots
 - Would like to see participation by PG/NSG in the triple-glazed window MT initiative
 - Jointly support municipal buildings performance standard as a MT program. Can be the most impactful MT initiative.
- Concerns about R&D budget, given the significant nature of budget constraints that northern gas utilities face. To the extent that there is going to money spent in this bucket, we don't think it's prudent to use limited dollars to develop new tech, focus instead on pilots for tech that's already commercialized.
- For non-IQ, would like to see more resources going into residential building envelope measures. We need to transform building stock over the next decades and we're really only scratching the surface on this.

[Jennifer Morris] When the EE programs first started, the northern utilities had joint small business programs, which are now separate. Could this be looked at jointly?

[Christina Pagnusat] We've still been able to serve customers cost effectively but we're open to discussing opportunities here; will follow-up.

[Chris Neme] It could be because ComEd dramatically ramped up the scale of their program, more than the gas utilities could afford, and therefore gas utilities went out on their own to deliver a smaller program where they could control the volume. Seems like there is a solution though. Is this a fair categorization?

[Jim Jerozal] My recollection, yes, it was due to a cost mismatch. Gas utilities couldn't keep pace with projects that moved forward. Program was also significantly focused on lighting. The kWh cut-off for a small customer was not matching with our customers, so we felt we were missing customers with gas.

[Jennifer Morris] Now that ComEd has decided to increase the cutoff, I wonder if that would help allow joint, and reach the customer's gas utilities want to reach.

[Jim Jerozal] Anytime we can partner on a single property is a good thing.

[Jennifer Morris] When PG/NSG presented the draft plan in Oct., there was immediate feedback on increasing the multifamily budget. Is there an update?

[Christina Pagnusat] We are working on running our model on different scenarios. Will follow-up.

Additional Comments and Feedback from Zoom Chat:

Metropolitan Mayors Caucus Presentation

Karen Lusson: The Elgin Green Energy Initiative one-pager that was shown on the screen is the kind of information that the utilities should be providing to customers. It showed via the pie chart how we use energy. More effective than the classic energy reports typically sent to customers.

Edith Makra: Thank you, Karen. These commissions are community volunteers who understand how to effectively reach and motivate their neighbors. We also have housing, senior, veteran and youth commissions that can help.

Feedback on Income Qualified for All Utilities

Cate York: Interested in Ameren IL/SEDAC Workforce Development Summit materials being provided as follow-up.

- Angie Ostaszewski: All of the research and summit materials can be found on this page: <https://smartenergy.illinois.edu/stronger-together>

Tyler Barron: ELPC echoes the points by Laura and supports this position on EE and solar as well. especially directing coordination between low income solar and low income EE. We believe that low-income solar programs are a great option for helping IL minority and under-invested communities with energy affordability. Laura mentioned some basic points that could help with low-income solar/IQ EE coordination that ELPC is supportive of:

- Referrals between IQ EE programs and Solar for All (this would help incentivize synergies for both EE and solar – getting more customers to EE)
- Adding solar feasibility questions to energy audits
- Research and development pilot with Solar for All.

Cate York: Map of approved LMI solar projects through the Illinois Solar for All program: <https://elevate.maps.arcgis.com/apps/webappviewer/index.html?id=c37a6a8914ec4bc5861159175f9dfbcd>

Yami Newell: Info on solar jobs training can be found here: <https://www.illinoissfa.com/job-training/>

Yami Newell: Info on grassroots community groups funded to do local energy education can be found here: <https://www.illinoissfa.com/grassroots-education/>

Angie Ostaszewski: Dropping a few links to web pages on our existing workforce efforts. Always happy to discuss if anyone has questions on these projects. Thank you!

<https://amerenillinoissavings.com/MDI>

<https://amerenillinoissavings.com/jobs>

<https://illinoisenergyefficiencyjobs.com/>

Kristol Simms: WFD booklet for adults: <https://amerenillinoissavings.com/portals/0/MDI/Ame-Wd-Adult-Booklet-20521.pdf>

EE workforce information for school age: <https://amerenillinoissavings.com/portals/0/MDI/py19-careers-in-ee-flyer.pdf>

Material used by AIC to educate CBOs and CAAs on how to help us design the 2022-2025 EE Plan: <https://amerenillinoissavings.com/portals/0/MDI/py20-building-an-energy-efficiency-plan-flyer.pdf>

Example of AIC community based partnership with the Illinois Black Chamber of Commerce: <https://amerenillinoissavings.com/portals/0/MDI/community-partnerships-case-study.pdf>

Example of AIC partnership with two community based organizations: Easterseals and Mindseye to offer EE/Smart Home pilot: <https://amerenillinoisavings.com/portals/0/MDI/mdi-smart-home-case-study.pdf>

Example of AIC EE program connected with energy assistance
<https://amerenillinoisavings.com/portals/0/MDI/customer-assistance-event-case-study.pdf>

Link to the AIC EE+Covid relief page <https://amerenillinoisavings.com/covid19>

Naomi Davis: Important to note that this feedback does not include the voices of many, many black and brown ratepayers, which some of us are still in the process of gathering.

Naomi Davis: Where do community-based organizations fall in context with CAA's with these "one-stops"? For example, Blacks in Green has been working every Saturday without any funding to address gaps in utility programs and delivery.

Celia Johnson: I'm happy to connect you with Energy Efficiency For All if it would be helpful, they shared the suggestion of a 'one stop shop' for income qualified multifamily programs

Andy Odom: On ComEd's agenda, it appears the higher income of 80% AMI will cease to exist. Leaving all IQ projects to be braided 100% with IHWAP dollars. So that means folks at 200% poverty and above will be left in the cold. In doing so, with dropping the income level to 200% there will be a ton of money left on the table. There are a lot of customers between 200%-80%ami that need all of our help. I understand there are other programs to help, that aren't free. These customers will not take advantage of these pay programs. We've been doing good work with Utility Only program, where IHWAP income limits fall short.

Molly Lunn: Andy, we appreciate your feedback. We are truly not wishing to leave folks in the cold, but as you mentioned make sure that the most in need are getting the greatest support. Our proposal is that folks above 200 and below 80 would still be able to access a free program, but the measures available would be scaled back. We are happy to discuss further with you though and think about what changes we may need to make to our draft proposal.

Katherine Elmore: CIC is interested in further discussion on targeting and potential changes to measures available to certain customers.

Jim Jerozal: Nicor Gas is not disconnecting residential customers. Both low income and not-low income.

Karen Lusson: Yes, Nicor, to its credit wisely chose not to disconnect people during the pandemic, which was much appreciated. But the problem will arise again when the winter prohibition ends.

Naomi Davis: Disconnection policy is fundamental for us to revisit. Regardless of what AMI folks are in, we are not aware of people in our community who do not pay their electricity bill because they can afford to, but are trying to "game the system." Karen's work has been key to helping CBO's understand ratepayer rights and how those of us dedicated to affordability can support our neighbors in keeping their utilities on.

Scott Fotre: There is a large portion of all electric heat in the Ameren territory Decades ago, there was a push and incentives to build all electric homes and a very attractive rate for these

customers. The rate disappeared with future rate orders and customers were left with the very expensive, all electric home.

Naomi Davis: Another word on affordability: a household may technically be able to "afford" to pay 10%, 15%, 20% and more of their household income on heat and light, but we understand national policy to be in consensus that more than 6% enters the range of "burden." We all understand household burden is real, and we all want equity. For equity we must "solve for disparity" ~ ensure those systemically harmed are first recipients of financial benefits able to level the playing field.

Closing & Next Steps

Celia Johnson, SAG Facilitator

Summary of follow-up items:

- IQ Feedback for All Utilities
 - EEFA/NRDC to share examples of income qualified solar activity in other states/by other utilities.
 - On tiered contracting feedback, it would be helpful for utilities to understand the perceived benefits of a vendor being tier 1 vs tier 2.
 - ComEd: Further discussion needed on targeting vs. eligibility.
 - Ameren IL: Interested in understanding the suggestion to reduce kits. CBOs and CAAs see kits as an opportunity to connect with their customers and communities.
 - Ameren Illinois to follow-up on actions to connect EE and disconnections.
- Peoples Gas/North Shore Gas Non-IQ Feedback from Stakeholders
 - May need further discussion on a possible joint small business offering in northern IL.
 - PG/NSG to provide an update on feedback to increase the MF budget, shared at Oct. meeting.