

**Illinois Energy Efficiency Stakeholder Advisory Group
Large Group Meeting:
Joint with Income Qualified EE Advisory Committee
Tuesday, November 17, 2020
10:30 am – 3:30 pm
Teleconference Meeting**

Attendee List and Meeting Notes

Meeting Materials

- Meeting Page: [Tuesday, November 17 Meeting](#)
- [Tuesday, November 17, 2020 Agenda](#)
- [Initial Feedback to All IL Utilities on 2022-2025 EE Plans, Non-Income Qualified](#) (Non-Financially Interested Stakeholders)

Meeting Attendees

Celia Johnson, SAG Facilitator
Greg Ehrendreich, Midwest Energy Efficiency Alliance (MEEA) – Meeting Support
Abigail Miner, IL Attorney General's Office
Adam Fields, Leidos
Adam Householder, Franklin Energy
Amalia Hicks, Cadmus Group
Amy Jewel, Elevate Energy
Andrew Cottrell, Applied Energy Group
Andrew Rains, IACAA
Andrey Gribovich, DNV-GL
Andy Vaughn, Leidos
Angie Ostaszewski, Ameren Illinois
Angie Ziech-Malek, CLEAResult
Anthony Santarelli, SEDAC
Arvind Singh, DNV-GL
Ashley Palladino, Resource Innovations
Atticus Doman, Resource Innovations
Bob Baumgartner, Leidos
Brett Bridgeland, Slipstream
Brittany Zwicker, CLEAResult
Bruce Liu, Nicor Gas
Bruce Montgomery, Energy Solutions
Cate York, Citizens Utility Board
Chanda Rowan, Nicor Gas
Cheryl Johnson, People for Community Recovery
Chet 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
Craig Catalo, Franklin Energy
Cynthia Segura, Metropolitan Mayors Caucus
Deb Dynako, Slipstream
Debra Perry, Ameren Illinois
Denise Munoz, ComEd
Diana Fuller, IACAA
Domingo Miranda, ComEd
Drew Samuels, Nexant
Emma Salustro, ComEd

Eric O'Neill, Michaels Energy
Foluke Akanni, Citizens Utility Board
Frank Schulmeister, Energy Sciences
Fred Wu, AiQueous
Gabriel Duarte, CLEAResult
Gina Melekh, Franklin Energy
Grant Snyder, IL Attorney General's Office
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 Gibson, Peoples Gas and North Shore Gas
Jennifer Morris, ICC Staff
Jenny George, Leidos
Jerad Wiskus, Franklin Energy
Jim Dillon, Ameren Illinois
Jim Fay, ComEd
Jim Jerozal, Nicor Gas
John Carroll, Leidos
John Lavallee, Leidos
John Pady, CEDA
Jon Gordon, Enervee
Jonathan Kleinman, Aiqueous
Julia Friedman, Oracle
Julie Hollensbe, ComEd
Katherine Elmore, Community Investment Corp.
Kathia Benitez, Franklin Energy
Kelly Gunn, ComEd
Kevin Grabner, Guidehouse
Kristen Kalaman, Resource Innovations
Kristol Simms, Ameren Illinois
LaJuana Garrett, Nicor Gas
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
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
Matt Armstrong, Ameren Illinois
Maurice Kaiser, Honeywell
Michael Pittman, Ameren Illinois
Mike King, Nicor Gas
Molly Lunn, ComEd
Naomi Davis, Blacks in Green

Nate Baer, Staples Energy
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
Randy Gunn, Guidehouse
Randy Opdyke, Nicor Gas
Rebecca McNish, ComEd
Rick Tonielli, ComEd
Rob Neumann, Guidehouse
Salina Colon, CEDA
Scott Fotre, CMC Energy
Scott Marner
Sharon Louis
Sharon Sy Lewis, Meadows Eastside
Shelita Wellmaker, Ameren Illinois
Stacey Paradis, MEEA
Steve Green, Oracle
Tamaira Jackson, Ameren Illinois
Ted Weaver, First Tracks Consulting, on behalf of Nicor Gas
Thomas Drea, Ameren Illinois
Tyler Barron, Environmental Law & Policy Center
Victoria Nielsen, Applied Energy Group
William Davis, Bronzeville Community Development Partnership
Zach Ross, Opinion Dynamics

Meeting Notes

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

Opening & Introductions

Celia Johnson, SAG Facilitator

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.

- This is the last large group SAG meeting of the 2020 Planning Process. 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.

Feedback on Ameren Illinois Preliminary 2022-2025 EE Portfolio (Non-IQ)

Non-Financially Interested Stakeholder Feedback (*Natural Resources Defense Council, Citizens Utility Board, Environmental Law & Policy Center, National Consumer Law Center, IL Attorney General's Office, ICC Staff, City of Chicago*)

Chris Neme, Energy Futures Group, on behalf of NRDC; other interested stakeholders

- High level initial feedback. Some more work to do to dive deeper into batch files with the details.
- There may be refinements or additions to these comments.

- This feedback is only for the non-IQ programs since IQ feedback was discussed yesterday.
- If we propose adding emphasis or new programs, that could mean budget from somewhere else. We are not proposing that budget be taken from IQ programs.
- We provide some initial thoughts on some policy proposals that utilities have made but feel that those should probably go through the Policy Manual process rather than utility-by-utility negotiations. City of Chicago feedback does not apply for Ameren.
- Ameren IL is clearly reflecting ideas that we have been discussing with them.
- Will review savings goals further.
- Portfolio allocation between IQ, non-IQ, residential, C&I – seems solid and a good start. Need to think about potential additions or modifications that might make sense.
- Portfolio program structure- generally support.
- Appreciate moving more programs upstream for more market penetration. Also support program consolidation.
- C&I food service equipment with other utilities, we think that is a great idea.
- There have been several conversations with Ameren about the savings opportunity for network lighting controls; pleased to see that in the plan. Want to better understand the plan/approach, maybe suggest refinements.
- Savings goals- We appreciate that if we propose changes that we need to do that in the context of the other things that have to be part of the portfolio and our other asks.

Additional Comments:

[Abby Miner] IL AG's office understands this involves lots of cost-benefit analysis and tradeoffs. We know any increase in IQ can come at the expense of the total savings. It doesn't change our priority with IQ funding as our top concern.

[Jennifer Morris] From Staff's perspective, it will be important to be clear how you plan to catch up on CPAS goals by 2030 given the expectations from the Commission order in the last docket.

- Residential Non-IQ. We strongly endorse the one-stop shop approach. Would like to understand the details more. General construct we appreciate and support.
- Also support the increased focus in the plan on heat pumps to displace electric resistance heat for MF buildings. We think the participation levels for non-IQ are solid (IQ needs more discussion).
- Would like to see a shift in focus on the gas side for residential programs to a whole-building EE for non-IQ, particularly non-IQ SF buildings.
- Pilots/R&D/Market Transformation: We have a few ideas for developing new approaches with good payoff or importance down the road.
 - Super-efficient all electric new construction
 - Piloting Wx of building envelop of small biz in IQ neighborhoods, connecting to IQ programs but not IQ itself
 - Would like MT programs to work with municipalities to adopt municipal performance standards
 - Would like to see a triple-glazed window effort statewide

- Policy Proposals- Several of them we're very open to talking about the details.
 - For example, support exploring net-to-gross ideas – we oppose going to gross savings, but there are a variety of other things under that topic and we're open minded
 - [Jennifer Morris] NTG frequency can be done in a future update process for the Policy Manual, but also is a topic in the evaluation planning meetings in December if there is feedback.
 - Market effects – savings from programs that aren't reflected in the credit for those programs. Conceptually agree if it can be done with reasonable confidence, not perfection.
 - Ameren raised the idea of leveraging other funding sources such as federal stimulus or other funding, and we think it's good to leverage and would need to talk through attribution.
 - Against redefining what expiring savings mean – we feel strongly that it is inconsistent with the extent of the statute and wouldn't support that.

Follow-up items on Ameren IL Feedback:

- May need further discussion on leveraging future federal funding
- Further discussion with negotiating stakeholders

Feedback on ComEd Preliminary 2022-2025 EE Portfolio (Non-IQ)

Non-Financially Interested Stakeholder Feedback (Natural Resources Defense Council, Citizens Utility Board, Environmental Law & Policy Center, National Consumer Law Center, IL Attorney General's Office, ICC Staff, City of Chicago)

Chris Neme, Energy Futures Group, on behalf of NRDC; other interested stakeholders

- We support ComEd's proposal to meet savings goals.
- We also appreciate the substantial increase in their IQ budget in the draft plan. Good start and we have a few more things to discuss.
- Overall approach to portfolio, we appreciate the move upstream and also support proposal to consolidate programs. As Molly suggested, we think there are more synergies across programs that could reduce admin costs.
- [Jennifer Morris] We think separating residential and IQ in the reporting is helpful.
- C&I:
 - As discussed yesterday, we understand why ComEd has moved out of non-IQ whole building retrofit. It should be in that space with a level of cost per savings that makes sense and we would like to discuss more, so gas utilities don't have to do it all on their own with their limited budgets.
 - Some focus on network lighting controls – untapped savings potential. Want to understand the budget and the approach,
- Residential non-IQ

- Financial support for gas utility programs at reasonable \$/kWh saved. Low cost virtual assessments that could be offered to all residential customers could be a lead generator.
- We still need to understand what ComEd suggested about targeting res programs to 150% of poverty or lower, or 200%; the question is the extent this is applicable to non-IQ programs as well. We don't have a concern with the target marketing, those customers segment can benefit the most. We want to make sure that those non-IQ programs are not excluding customers above the income threshold even if they aren't target marketed.
- Would like to see a single smart t-stat rebate for ComEd and gas utilities
- Third-party program participation
 - ComEd is required to spend third party budget through a competitive solicitation.
 - In current cycle, RFP for ideas and vendors identified a range of areas where they did and didn't want proposals in order to fill gaps in program/market areas and innovative ideas. In this plan cycle proposal is to be more focused or limiting in the RFP to industry-specific initiatives. We think that is a good idea, but we worry about that being the sole and exclusive thing to bid on.
 - We hope ComEd can leave open a possibility for other areas that don't overlap with existing programs. We think the statutory purpose was to give people with new ideas that utilities and stakeholders haven't seen on the table. If we don't leave a broader option, we're undermining a goal of the statute.
 - [Phil Mosenthal] We would also like to see inclusion of creative approaches to IQ in the third party RFP.
- Other feedback
 - Proposal mentioned monitoring bill impacts to compare to deemed savings. We're supportive of knowing what is actually happening. We want savings to be real and accurate. We want to be careful that whatever is set up is balanced – if we collect data to understand bill impacts, we have to look at both understating and overstating.

[Phil Mosenthal] To the extent you can use AMI data creatively to understand impacts, needs to be considered with attribution and everything in the evaluation process.

[Chris Neme] It could also be using to pair meter data with other data collection from participants, to determine why the bill impacts occurred.

[Sharon Lewis] Regarding the impact and how heating savings aren't seen across the board. If there is no education and training around it, people using new equipment like their old equipment. And I've heard from seniors that these new thermostats to control their heating but they can't really see it – there is a disability need. Poor vision so they think they are turning to 78 and they are turning up to 98; need to consider education and training. Installers and contractors that look like the community they are servicing would bridge the communication gap. Training on how to talk to people in their homes; etc.

- Other feedback (cont. from above)

- Demand response is not part of the EE portfolio. There is some overlap and DR is important for managing costs on the grid.
- Important to think about the EE/DR linkages and solar rebates and everything else. We are interested in coordination of customer communication with EE/DR/solar rebates/other thing as well. Yesterday's discussion about arrears and bill payments too.
- [Cate York] This connects to a lot of the discussions. Pulling back some of the market rate programs to the IQ space, there needs to be an understanding of higher income customers' higher contribution to peak load that impacts price for all customers. There should be an investment in IQ for EE, but also an investment in the high share of peak load in high income homes. Including some DR on the marketplace is great. And have to bring some of this education or joint coordination or pilot – if retail products channel to higher income can include some DR as well that would be great. As this transition occurs, we don't want unforeseen side effects from that that affect low income households.
- Proposed declines in the later years of portfolio level costs – could that occur earlier?
 - [Jennifer Morris] If you can achieve and spend less on portfolio costs, we would like to see that.
- R&D and Market Transformation – interested in exploring with ComEd the potential to pursue a market transformation initiative around building performance and efficiency standards and triple glazed windows.
 - [Molly Lunn]: The reason we reduced portfolio costs in later years is to meet goals; some of that was a challenge to reduce. We feel that we need R&D to reach our Plan 7 goals. For R&D, trying to move away from small projects and get bigger ones, with bigger savings impacts.
- Stakeholders support general concept of community / workforce development.

[Sharon Louis] As we think about modifying IQ vs market rate residential, need to consider gross vs net income. Particularly now where many residents are shifting into different economic silos. Can't strip market rate programs without some consideration for those issues.

[Naomi Davis] We know what kind of workforce supports and partnerships need to be in place. We're not talking just about jobs and capacity; we're talking about bringing the new green economy to the black community and the Latinx communities are fully in sync with that thinking as well. We want to level the playing field with that clear strategy.

Follow-up items on ComEd Feedback discussion:

- Whole building- ComEd is looking into this and will discuss with gas utilities.
- ComEd to follow-up with Ameren IL on Ameren's pilot proposal to look at discretionary income as a measure of income eligibility.
- Further discussion with negotiating stakeholders

Feedback on Nicor Gas Preliminary 2022-2025 EE Portfolio (Non-IQ)

Non-Financially Interested Stakeholder Feedback (Natural Resources Defense Council, Citizens Utility Board, Environmental Law & Policy Center, National Consumer Law Center, IL Attorney General's Office, ICC Staff, City of Chicago)

Chris Neme, Energy Futures Group, on behalf of NRDC; other interested stakeholders

- We haven't yet had a chance to dive into the batch files, so not ready yet to draw conclusions about reasonableness of the targets. Appreciate the increase in IQ budget as a good start.
- Program mix, no concerns with the overarching structure but have a few program areas to explore.
- C&I programs, we support the midstream food service program.
- Residential Non-IQ
 - Would like to see a bigger gas investment in whole building EE for non-IQ. As we've talked about today. It's all connected. Money has to come from somewhere with tradeoffs. If ComEd can contribute it helps.
 - We would also like to think about shifting from programs like Home Energy Reports and kits that we aren't as enamored with. Breadth vs. depth, short vs. long savings, we get that. It's an interest of all of the stakeholders.
- Pilot/R&D/MT
 - We support the MT efforts and the points earlier about working with Slipstream on municipalities.
 - Also still interested in triple glazed windows.
 - We have some concerns with the amount for R&D and where that is focused. With the constrained budget, we question whether the full statutory 3% should be spent on R&D especially non-commercialized technology like gas heat pumps. We think it should focus on focuses for accelerating uptake of commercialized technology.
- Proposed policy on converting electric savings to gas: We oppose that approach.
 - [Jennifer Morris] Related to the elect to gas equivalent, we have statutory concerns. Given that electric statute specifically allows for a limited amount, if it was intended for gas it should have been in the statute. That would make us more comfortable. And we want there to be joint programs. We don't want ComEd to be exiting out of programs.
 - [Chris Neme] Another concern we have on this proposal is a policy one. The reason that statutory option to convert gas savings to electric equivalents, was the recognition that the electric programs got changed dramatically and had larger budgets, it was thought the electric utilities could pursue efforts the gas utilities couldn't afford. The converse isn't true; gas utilities don't need to go after electric savings to reach gas targets.
 - [Jim Jerozal]: There is a lot of leverage Nicor is getting out of the pilot / R&D / MT spend; makes a significant impact. We added 6-7 measures to last TRM. Gas heat pumps is a tremendous opportunity for savings.

- [Jim Jerozal]: On electric conversion to gas, there are parts of our territory that don't overlap with ComEd where there is no electric EE program.
 - [Ted Weaver]: This could also include areas where ComEd isn't a program partner.
- Second proposed policy for mid-cycle NTG changes. We want to understand the details better and explore that.
- Stakeholders will likely want to have some discussion around constraints with average measure life, some programs that go deeper and others that don't. We don't want to negotiate targets that assume deeper savings and then flexibility is used to switch to something different. Some other constraints such as equity between SF and MF IQ programs.
- [Jim Jerozal] On workforce development, will work on this; need to figure out where budget will come from.

Follow-up items on Nicor Gas Feedback discussion:

- Discussion with all utilities may be needed on gas conversion question
- Further discussion with negotiating stakeholders

Additional Comments and Feedback from Zoom Chat:

- Sharon Sy Lewis: Contractors is a question that really needs to be addressed overall, the lack of diversity is overwhelming.
- Larry Dawson: The Illinois Association of Community Action Agencies agrees with the comments by Naomi Davis encouraging the utilities' efforts toward building a diverse and inclusive energy efficiency workforce. All efforts toward the goal of addressing historical inequities multiply the outcomes described today. Workforce development targeted to minority groups will enable the communities we serve to experience long term benefits beyond just energy cost savings. In addition, seeding the future pipeline of workers and contractors who are diverse will benefit our agencies who are regularly searching for talent.
- Cate York: We were excited to hear about Ameren's efforts on self-certification for MBEs, and are curious about efforts by other utilities, and potential for inter-utility collaboration on best practices toward expanding contractor access.

Closing & Next Steps

Celia Johnson, SAG Facilitator

Summary of follow-up items:

- Ameren IL Non-IQ Feedback from Stakeholders
 - May need further discussion on leveraging future federal funding
 - Further discussion with negotiating stakeholders
- ComEd Non-IQ Feedback from Stakeholders
 - Whole building- ComEd is looking into this and will discuss with gas utilities.

- ComEd to follow-up with Ameren IL on Ameren's pilot proposal to look at discretionary income as a measure of income eligibility.
 - Further discussion with negotiating stakeholders
- Nicor Gas Non-IQ Feedback from Stakeholders
 - Discussion with all utilities may be needed on gas conversion question
 - Further discussion with negotiating stakeholders
- All Utilities:
 - CUB questions: Are there efforts on self-certification for MBEs? Is there potential for inter-utility collaboration on best practices towards expanding contractor access?