

# **IL EE Stakeholder Advisory Group**

**SAG Planning Process for Q1/Q2 2017**

## **SAG Planning Meeting**

Tuesday, January 31, 2017

10:30 – 4:30

**Midwest Energy Efficiency Alliance**

**20 North Wacker Drive, Suite 1301**

**Chicago, IL 60606**

## Attendee List and Action Items

### **Attendee List**

Annette Beitel, SAG Facilitation  
Ashley Palladino, SAG Facilitation  
Agnes Mrozowski, Ameren Illinois  
Aimee English, Citizens Utility Board  
Andrew Braatz, Nexant  
Anne Evans, Elevate Energy  
Anne McKibbin, Elevate Energy  
Ashley Harrington, 360 Energy Group  
Arturo Hernandez, ComEd  
Bettina Stanford, Illinois Commerce Commission (“ICC”) Staff  
Bridgid Lutz, Nicor Gas  
Chantal Jones, ComEd  
Chelsea Lamar, Navigant  
Cheryl A. Miller, Ameren IL  
Chris Neme, Energy Futures Group, on behalf of NRDC  
Chris Vaughn, Nicor Gas  
Clair Cowan, Seventh Wave  
Clare Butterfield, Illinois Science & Energy Innovation Foundation  
Craig Catallo, Franklin Energy

Daniel LaFevers, Gas Technology Institute  
David Baker, Energy Resources Center, UIC  
David Brightwell, ICC Staff  
David Diebel, ADM Associates  
Debra Perry, Ameren IL  
Deirdre Coughlin, Department  
Ed Kriz, Nicor Gas  
Edward Schmidt, MCR Performance Solutions

Elena Savona, Elevate Energy  
Erin Conley, Department  
Erin Daughton, ComEd  
Erin Stitz, Applied Energy Group (AEG), on behalf of Peoples Gas – North Shore Gas (PG-NSG)  
Gary Ambach, Seventh Wave  
George Malek, ComEd  
Ghassan Majdalani, CLEAResult  
Gillian Wiescher, Chicago Bungalow Association  
Hammad Chaudhry, Nicor Gas  
Hannah Arnold, Opinion Dynamics  
Jack Erffmeyer, Citizens Utility Board  
Jacob Stoll, ComEd  
Jaime Alfaro, Nicor Gas  
Jane Colby, Cadmus  
Jansen Pollock, ComEd  
Jean Ascoli, ComEd  
Jen Morris, Illinois Commerce Commission (“ICC”) Staff  
Jeremy Offenstein, ADM Associates  
Jim Fay, ComEd  
Jim Heffron, Franklin Energy, on behalf of PG-NSG  
Jim Jerozal, Nicor Gas  
Jim Zolnierrek, ICC Staff  
Joe Reilly, Applied Energy Group  
John Madziarczyk, Nicor Gas  
Jon Jackson, Ameren IL  
Jordan Berman-Cutler, Department  
Julia Friedman, MEEA  
Julia Sander, Leidos  
Juliana Pino, LVEJO  
Julie Hollensbe, ComEd  
Karen Lusson, IL Attorney General’s Office  
Karen Winter-Nelson, SEDAC  
Kate Brown, Building Research Council, University of Illinois Urbana - Champaign  
Keith Martin, Ameren IL  
Kelly Lena, Nicor Gas  
Kelly Turner, ICC Staff  
Ken Amin, ComEd  
Ken Coolcutt, Ameren  
Kevin Dick, Delta Institute  
Kevin Grabner, Navigant

Kim Ballard, Ameren IL  
Koby Bailey, PG-NSG  
Kristi Simkins, Nicor Gas  
LaJuana Garrett, Nicor Gas  
Laura Goldberg, NRDC  
Lawrence Kotewa, Elevate Energy  
Lauren Casentini, Resource Innovations  
Leslie DeVore, Department  
Maged Kafafy, DNVGL  
Marc Coburn, DNVGL  
Margaret Hansbrough, City of Chicago  
Mary Ellen Guest, Chicago Bungalow Association  
Mayra Ortiz, Nicor Gas  
Mick Prince, Department  
Mike Brandt, ComEd  
Mike King, Nicor Gas  
Mike Marks, AEG on behalf of PG-NSG  
Molly Lunn, Department  
Neil Pickard, Nexant  
Nick Lovier, Ameren  
Nicole Sage, ADM Associates  
Noel Corral, ComEd  
Paige Knutsen, Franklin Energy  
Pat Michalkiewicz, PG-NSG  
Patricia Plympton, Navigant  
Paul Knight, Domus PLUS  
Paul Young, AM Conservation Group  
Peter Ludwig, Elevate Energy  
Rick Bain, Embertec  
Rob Neumann, Navigant  
Roger Baker, ComEd  
Sandra Henry, Seventh Wave  
Scott Tess, City of Urbana  
Stacie Young, CIC Chicago  
Stacy Gloss, University of Illinois, Indoor Climate Research and Training  
Stefano Galiasso, Energy Resources Center, UIC  
Tamara Dzubay, ELPC  
Taria Dees, Nicor Gas  
Ted Weaver, First Tracks Consulting, on behalf of Nicor Gas  
Teri Lewand, ComEd  
Terry Fry, Nexant

Tina Grebner, Ameren  
Todd Thornburg, ComEd  
Travis Hinck, GDS Associates  
Tyler Hammer, Nexant, on behalf of ComEd  
Vincent Gutierrez, ComEd  
Wael El-Sharif, 360 Energy Group  
Wayne Hartel, Department  
Will Baker, Midwest Energy Efficiency Alliance

### **Meeting Notes and Action Items**

Action items are indicated in **yellow** highlight.

### **Current DCEO Program Presentation – *closed to utilities and non-financially interested stakeholders only***

- Next steps:
  1. **Average low income and public sector \$/kWh and \$/therm data**
    - DCEO provided PY7 costs per kWh and cost per therm, additional references will be beneficial to utilities as they plan their portfolios.
    - **Action Item:** SAG Facilitation to compile average cost per therm for both low income and public sector programs (DCEO, other programs, national benchmarks).
  2. **Potential Study – ERC – Low Income and Public Sector Programs**
    - Note: Potential study was completed for IL, does not distinguish between utility territories, but some north/south information is available.
    - **Action Item:** Post 2016 study to SAG website (complete, [linked here](#))

#### **Public Sector:**

#### **3. CHP**

- Significant interest and opportunity in the public sector (may be impacted by 10MW customer exclusions). Majority of interest was in ComEd territory, not well developed in Ameren territory, partly due to limited potential.
- Proposed projects that were not funded were unlikely to move forward. Design phase is expensive, and design incentive helped to move projects forward.
- **Action Item:** ComEd and Ameren (ComEd esp. due to historic interest and potential) are strongly encouraged to maintain offering.
- **Action Item:** DCEO to share historic customer/applicant list with utilities (only ComEd territory received applications).

#### **4. Aggregation and Key Accounts**

- Metropolitan Mayors Caucus (MMC) and Illinois Green Economy Network (IGEN) for community colleges offered key project management and customer support services to constituencies
- Project managers able to aggregate across meters to plan for larger projects (e.g. customer proposed \$2M in capital improvements across multiple locations, allows for easier participation – program helps to manage individual accounts/incentives and grants/etc.)
- Project managers (MMC, IGEN) were able to claim an additional 5% (on top of grant/incentive) for administration
- Key accounts varied, approximately 10-12 statewide (Cook County has participated in the past but is not currently an active key account)
- **Action Item:** DCEO to share key accounts, aggregate customers with utilities

#### **5. Public Sector Customer Support**

- MMC provides customer support end-to-end to ensure customers complete projects (outreach, education, fill out applications)
- **Action Item:** Utilities strongly encouraged to maintain support network (e.g. MMC) and offer increased key account management/support
- **Action Item:** Utilities strongly encouraged to maintain 5% admin incentive

#### **6. Service Provider Networks**

- Does DCEO use/maintain a network?
  - Open installing contractor network for projects installed
  - Service provider used for investment-grade audits

#### **7. Incentive levels offered above standard offerings:**

- Custom - \$0.12/kWh, \$2.50/therm; Waste Water Treatment (WWT) \$0.36/kWh, up to 75% of the project cost
- **Action Item:** Utilities strongly encouraged to maintain increased incentive levels

#### **8. Assessments:**

- Investment-grade audits did not convert to projects as expected. Continue to offer upon request, but not actively promoted.
- Assessments did not typically include DI, DI was provided to facility for self-install. DCEO intended to move toward more DI during the assessment, but found value in self-install due to property engagement.

#### **9. Waste Water Treatment Plants (WWT)**

- Downers Grove completed CHP

- Some customers may be over 10MW (Metropolitan), but majority should be eligible
- Implementer approached upgrades as process improvements, which also saved energy, in order to sell concept to customers

#### **10. Unique, Sector-Specific Measures:**

- **Action Item:** Utilities encouraged to consider sector-specific measures, e.g. street lighting, WWT

#### **11. Statewide, Integrated Programs:**

- One message/offering is encouraged, especially when conducting outreach to customers via associations/IGEN/etc., to ensure clear message and consistent offerings
- **Action Item:** Utilities are strongly encouraged to consider statewide and integrated (gas and electric) programs, due to customers being challenged to participate at all.

#### **12. Allocation to Serve Full Public Sector:**

- State facilities continue to be a challenge, but there is significant potential.
- STEP reached state facilities.
- State universities have significant gas opportunities.
- **Action Item:** DCEO to share primary contacts with utilities for state facilities and other key accounts they reached through STEP/other programs.

#### **13. ESCO considerations**

- Limited to no ESCO participation, but potential to revisit. Previously targeted ESCOs successfully, but discontinued.
- **Action Item:** Utilities encouraged to revisit ESCO engagement strategy and support.

#### **14. Aggregated Purchasing**

- Potential to increase purchasing power by public sector (e.g., MMC/IGEN/others could facilitate bulk purchasing across multiple entities within public sector to decrease costs)
- **Action Item:** Utilities encouraged to explore and/or facilitate bulk purchasing opportunities.

#### **15. Technical Support**

- Public sector customers are often not as sophisticated with technical/data/etc. and require additional support from the program for participation (for example, not as familiar with technologies, bid process, energy modeling/calculations/etc.)

#### **Low Income:**

#### **16. Master Metered Customers**

- When calculating budgets, customers who pay utilities as part of their rent (master metered properties) should be taken into consideration.
- **Action Item:** Utilities to review budget calculations to confirm master metered low income customers are taken into consideration.

**17. Leveraging Funding Action Item:** Additional discussion needed on how funds from other sources are leveraged/managed/etc. and how savings are allocated for utility funded measures

- **Action Item:** SAG Facilitation to coordinate additional discussion during upcoming meeting on how programs leverage other funding sources, and allocate savings to utility-funded measures

**18. Public Housing vs. Public Housing Authorities (PHA)**

- Definition of “public housing” still needed
- DCEO offered program specific to PHAs, but intended to open participate up to a broader group of public housing.
- PHAs are part of and engaged with the IL Association of Housing Authorities.
- **Action Item:** SAG Facilitation to coordinate additional discussion during upcoming meeting to gain consensus on what is included in public housing, and agree on consistency statewide (2/21/2017).
- **Action Item:** Utilities to coordinate with HUD, PHAs to obtain the addresses of properties within PHAs

**19. “Bulk” Project and Purchasing Opportunities**

- Majority of projects have been one-off, but there is opportunity to facilitate both projects and purchasing across multiple properties, entities, etc.
- Ex. CEE coordinated bulk purchasing of ENERGY STAR appliances across multiple cities.
- **Action Item:** Utilities to explore opportunities for projects to be implemented or purchases to be coordinated across properties, entities, etc. to reduce costs and admin.

**20. Customer Segment Needs/Recommendations**

- Statewide and integrated offerings
- Customer education to facilitate sustained savings
- DCEO was planning to develop statewide customer-facing website
- Agree on common definitions (low income, low-to-moderate, etc.)
- **Action Item:** Utilities to discuss coordination opportunities on offers/programs, customer engagement, definitions.

**21. Affordable Housing – New Construction**

- Program not covered during presentation due to time constraints.

- **Action Item:** SAG Facilitation to add to 2/21/2017 meeting agenda to review program and recommendations from DCEO.

**Statutory Language Review – Low Income, Public Housing (Karen Lusson, Assistant Bureau Chief, Public Utilities Bureau, Illinois Attorney General’s Office)**

- Next steps:
  - 1. Coordinated Large-Group Follow Up**
    - Due to limited time for discussion on proposals presented during this section, additional discussion will be arranged following distribution of recommendations.
    - **Action Item:** SAG Facilitation to compile full list of open items and recommendations, with follow-up meeting 2/21/2017.
  - 2. Additional Public Housing Resources**
    - National Housing Preservation Database, includes all available data on federally subsidized housing properties and includes nine separate funding streams (recommended by Laura Goldberg, NRDC). <http://www.preservationdatabase.org/>
  - 3. Low Income Committee Participants**
    - Statute includes electric utilities, gas utilities, implementing contractors and community-based organizations as participants.
    - Additional recommendations include all SAG participants (Karen Lusson) and environmental justice organizations such as NAACP (Anne McKibbin).
    - **Action Item:** New potential attendees to be agreed upon by SAG, with introductions made by Anne McKibbin.

**Panel Discussion – Low Income Programs**

- Leslie DeVore & Mick Prince – DCEO WAP
- Kate Brown – Building Research Council, University of Illinois Urbana - Champaign
- Paul Knight – Domus PLUS
- Peter Ludwig – Elevate Energy
- Mary Ellen Guest – Chicago Bungalow Association
- Next steps:
  - 1. Leveraging Additional Funding**
    - (Also noted above)



- **Action Item:** Detail needed on how other funding sources are leveraged, and how individual programs allocate savings to utility-funded measures if funds are comingled.
2. **WAP – Training Facilities**
    - Currently training is conducted in Champaign, but looking at Chicago-based location which is likely to focus on multi-family.
  3. **PHA – “non-PHA” participation statistics/information**
    - Program only recently started extending program offers to other public housing, outside of PHAs. (Chris Neme) – interested in how that segment has participated, differences, etc.
    - **Action Item:** DCEO / program implementer to provide additional detail on this segment, lessons learned, etc.
  4. **EE Affordable Housing – new construction and gut rehabs**
    - All or nothing, above code.
    - Program intended to move to performance-based incentives as savings become more difficult to achieve, percentage EE achieved above code. Potential for passive house within program.
  5. **Illinois Housing Development Authority (IHDA) loans –**
    - Community Investment Corporation (CIC) provides financing, many of EE Affordable Housing program’s projects utilize loans.
  6. **Chicago Bungalow Association**
    - Potential expansion outside of city limits being discussed, likely longer-term plan.

### **Panel Discussion – Public Sector Programs**

- Karen Winter-Nelson – SEDAC
  - Stefano Galiasso – ERC
  - Ashley Harrington – 360 Energy Group
  - Amanda LaBrier – City of Chicago, Department of Fleet & Facility Management
- Next steps:
    1. **Potential study referenced** – noted above, posted to SAG website.
    2. **Conversion Rates**
      - Utilities are interested in statistics around conversion to a project from engagement (from outreach, interest, or assessment completed), with detail on what constitutes a “project,” (e.g., one measure, all recommendations; what percentage of recommendations are completed, over what time).
      - Ex. – (SEDAC, RCx.) within 3 years of initial assessment, 75% of participants have completed at least 1 measure; an average of 50%

of recommendations from the assessment are completed eventually.

- **Action Item:** DCEO/program implementers to share additional data on conversions, project completions, etc.