

Illinois Full (IQ-N and IQ-S) Income Qualified (IQ)

Energy Efficiency (EE) Committee Meeting

(“LIEEAC”)

On “Related Issues – Meeting #3”

Wednesday, November 30, 2022

1:00-3:00

Attendee List and Meeting Notes

Attendee List:

Abigail Miner, Illinois Attorney General's Office

AJ Young, Greenlink Energy Solutions

Alan Elliott, Opinion Dynamics

Amy Jewel, Elevate Energy

Annette Beitel, Future Energy Enterprises (IQ Committee Facilitator)

Arlinda Bajrami, Midwest Energy Efficiency Alliance

Armecca Crawford, Peoria Housing Authority

Brad Warrenburg, CMC Energy Services

Brian A'Hearn, CLEAResult

Carla Walker-Miller, Walker-Miller Energy Services

Celia Johnson, SAG Facilitator

Cheryl Johnson, People for Community Recovery

Chet Kolodziej, Energy Efficiency and Solar System Advisor

Christopher Vaughn, Southern Company

Claudette Harrell, Proviso Leyden Council for Community Action

Courtney Hanson, People for Community Recovery

Dalitso S. Sulamoyo, Champaign County Regional Planning Commission (CCRPC)

Dan Moring, Slipstream

David A Kilgore, Ameren Illinois

David Brightwell, ICC Staff

Deborah Dynako, Slipstream

Dena Jefferson, Franklin Energy

Diana Fuller, Walker-Miller Energy Services

Elizabeth Horne, ICC Staff

Eve Pytel, Franklin Energy

Gregory Norris, ACES4Youth

Haley Keegan, Resource Innovations

Jeff Erickson, Guidehouse

Jenna Hart, BCMW Community Services

Jeremy Oshner, Two Rivers Regional Council of Public Officials

Joel McManus, TRC Companies

Jon Vrandenburg, Two Rivers Regional Council of Public Officials

Julia Friedman Opower, Oracle Utilities

Kalee Whitehouse, VEIC

Karen Lusson, National Consumer Law Center

Katie Elmore, Community Investment Corporation

Lance S Escue, Leidos

LaShelle Newland, Resource Innovations

Lisa Miranda, Rebuilding Together Metro Chicago

Lorelei Obermeyer, CLEAResult

Marcia Derrer, Northwestern Illinois Community Action Agency

Marissa Strassel, MUSE Community Design

Mary Ellen Guest, Historic Chicago Bungalow Association

Mary Johnson, Resource Innovations

Mia Berrios, People for Community Recovery

Michalina Sokol, Pathlights

Mike Newman, CMC Energy Services

Neil Curtis, Guidehouse

Nelson May, Future Energy Enterprises (IQ Committee Facilitator)

Nikki Kuhn, VEIC

Odette Watson, East Central Illinois Community Action Agency

Patrice Suggs, Solutions for Energy Efficient Logistics (SEEL)

Peter D. Pasholk, Champaign County Regional Planning Commission (CCRPC)

Philip Halliburton, ComEd

Robert Herron, Kankakee County Community Services

Robert Rusteberg, Leidos

Roberta Tolson, ComEd

Rodd Whelpley, IMEA

Ronna Abshure, ICC Staff

Sarah Moskowitz, Citizens Utility Board

Sean Reed, Solutions for Energy Efficient Logistics (SEEL)

Seth Craigo-Snell, SCS Analytics LLC

Sharon "Sy" Lewis, Meadows Eastside Community Resource Organization

Stacey Paradis, Midwest Energy Efficiency Alliance (MEEA)

Steffen Canino, The Will Group

Tamika Cole, Walker-Miller Energy Services

Thomas Drea, Ameren Illinois

Tina M Grebner, Ameren Illinois

Victoria Nielsen, Applied Energy Group

Vincent J Gutierrez, ComEd

William Davis, Bronzeville Community Development Partnership

Zachary Ross, Opinion Dynamics

Introduction – Annette Beitel

- Will be going over evaluators for Ameren and ComEd
- Will then be hearing from IQ TRM Working Group

Alan Elliot, Opinion Dynamics Corporation – Ameren IL

- Agenda
 - Overview of evaluation
 - IQ Evaluation Approach
 - Discussion on potential low-income topics/focuses
 - Upcoming Opportunities to provide feedback
- What is Evaluation?
 - Evaluation, measurement and verification (EM&V). In the energy efficiency field, these terms are often used interchangeably, but other fields such as education, healthcare and international development have had a history of utilizing evaluation measures.
 - Goal: Use data to determine effectiveness and efficiency of programs
 - Verify achievement of intended outcomes. Outcomes do not need to relate to energy, can be related to health, safety, reaching underserved markets and/or improving customer knowledge on energy management.
 - *Note: must be completed by an independent third-party contractor.*
- Core Components of Energy Efficiency Evaluation
 - **Impact Evaluation**
 - Calculate and document program energy saving achievements.
 - **Market Research**
 - Understand changes to and opportunities within the market.
 - **Process Evaluation**
 - Understand and improve program performance.
 - Forums are valuable to collect information and to contextualize information that is being gathered and presented. Survey research can be beneficial as it can verify savings assumptions. Customer research can also give insight to program influence and how program initiatives dictate energy outcomes. Impact evaluations, however, remain the top priority because Ameren and other corporations have annual savings goals.
 - *Question:* Would you welcome input from CBO's and CAA's for possible future market research studies?
 - *Answer:* Absolutely. Market research is a great area for us to get input from this group. We would like to gather more data from this group so that we are addressing and understanding the needs of this population. There are a few ways that communication can happen. This can be done through the implementation of different community action agency channels. At Ameren, we periodically gather input from CAAs as a part of our process evaluation of that channel. In 2023, we are considering adding mobile homes to the channel.
 - *Question:* How do we serve returning citizens populations? Furthermore, how do we bring in more program and trade allies to diversify the workforce? What is the best way to gather information on what is being done to support program allies?
 - *Answer:* This can fit into process evaluation because this is important feedback for energy companies to hear. These questions will fall under process evaluation, with discussion questions to follow.

- Opinion Dynamics' Role
 - As the independent evaluator for Ameren Illinois, the evaluation team designs, executes and communicates results from annual evaluation activities to:
 - Ameren Illinois and their implementation partners
 - Illinois Commerce Commission Staff
 - Any other interested stakeholders via the Illinois Energy Efficiency Stakeholder Advisory group and the Low-Income Energy Efficient Advisory Committee.
 - Research goes to Ameren and ICC for them to comment
 - Final reports are posted to the IL SAG website
 - Once report is final, work with facilitators to discover what research and information is most valuable to stakeholders
- 2023 Evaluation Planning Timeline
 - Each evaluation is a 21-month cycle with an October-February timeline.
 - Stakeholders will receive information throughout the year, not just within final report
 - Planning for 2023 ongoing
 - Opportunities to hear about research results throughout the year
 - Evaluators will work with facilitators to determine what needs to be shared with stakeholders
 - Opportunities to comment are coming soon
- IQ Evaluation Sector Approach
 - 2023 plan is not finalized and is still ongoing
 - Impact and market evaluations of every Ameren Illinois Income Qualified offering
 - This includes various single-family offerings (low to moderate income)
 - Multifamily initiatives (market-rate, IQ and public housing)
 - Deeper, targeted process evaluation (these change yearly)
 - 2023 focus is relatively new and has scaled up channels.
 - Also includes mobile homes and air sealing for healthier homes
 - Additional market research on an as needed basis
- Opportunities for Feedback
 - 12/6 SAG Meeting
 - Verbal feedback encouraged
 - 12/15 Opinion Dynamics submits draft written plans to comment
 - 1/15 due date for draft written plan comments
 - Reminders will be sent through LIEEAC Facilitator
- Discussion
 - *Overall Discussion Question:* What are the most important topics on your minds for the IQ Populations in the Ameren Illinois territory going into 2023?
Sub Question: How do we unify standards between state and federal programs?

Answer: Evaluator is looking at how Ameren is utilizing CEJA, there is existing research on braided funding that is publicly available. That is something we need to think about as in the past, we have done significant research on Federal and State funding and how the two overlap.

Question: How do we identify evaluation for shade tree measures?

Answer: Evaluators will work together to assist in program design. Stakeholders that have been trying to push for comprehensive weatherization portfolios to make sure that utilities are as comprehensive as possible, so they mimic the state weatherization program. An important role for

evaluator would be to compare the two programs and if they are sufficiently putting forth comprehensive efforts. (State vs Federal). Stakeholders are pushing to identify health and safety issues that prevented the implementors from weatherizing a building. Identify roadblocks to move forward. It is important for there to be comprehensiveness on health and safety in tandem with the Income Qualified programs.

Guidehouse – ComEd Evaluators, 2023-2025 Evaluation Plan

- ComEd Portfolio Plan – 2023
 - Budget vs Persisting savings
- Structure of the Evaluation – Residential Sector Programs
 - Promoted broadly as the ComEd energy efficiency program
 - Income qualified services are embedded into ComEd’s plan 6 residential programs
 - Direct to consumer:
 - Single Family upgrades
 - Multifamily Upgrades
 - Behavior – Res/IE
 - Channels:
 - Retail/Outline
 - Product Distribution
 - New Construction – IE
 - Contractor / Midstream Rebates
- Residential and Income Eligible NTG Evaluation Draft Timeline
 - IE Retail Discounts program, no plan for doing work on lighting. These products are expected to be removed from retail.
- *Question:* What is the net-to-gross ratio?
 - *Answer:* A major question we ask is “what you would have done in the absence of the program. We have two categories of customers: free-riders and spill-over. Free-riders are the people who would have gone and purchased a smart-strip, regardless of the program incentive. Spill-overs are those who heard of the smart-strip through the implementing program, but without the incentive. In the world of IQ, on a national level, a lot of these customers do not have the resources to purchase these items on their own. With that in mind, we are not doing net-to-gross research on income qualified programs.
- *Question:* What is the realization rate?
 - *Answer:* If a utility reports savings, and the evaluator reports a different value, the realization is the Evaluator savings/the utility savings. Verifications are based on TRM Values. Realization rates can be used to help educate measures such as smart thermostats or power strips. It is more cost effective for utilities to reduce demand than to increase supply. However, IQ Demands that benefits of energy saving programs are equitable. It is important for energy companies to hear from their utilities in order to tell their customers that they stand by their savings and that they are doing the appropriate work.
- Program Co-delivery Research
 - Objective: identify and describe existing program or pilot offerings at other utilities that co-deliver a combination of energy efficiency, demand response, EV, battery storage, and renewable energy programs to utility customers. Specific to IQ households, programs combining financial assistance and energy services.
 - Tasks:
 - Background Research

- Interviews with Utility contacts
 - Synthesize and report findings
- IE Multifamily Research
 - Research designed to gain insights on IQ offerings
- *Question:* There have been studies of IQ families removing equipment due to frustration on how to correctly use it. Have similar studies been conducted by ComEd, specifically for IQ communities?
 - *Answer:* I cannot directly say that I have done research specifically on IQ, however, there definitely there is research that I have conducted that suggests that there are individuals who remove their equipment due to frustration or confusion on its maintenance. However, that is where my job comes in, and that job is to help anyone who find themselves in those situations.
- *Question:* Will the mentioned research be publicly available?
 - *Answer:* The research is being done and it is on a fast track. I believe it will be done in the next 2-3 months. We normally provide our research to stakeholders, who will then post the data on the ComEd website. I would hesitate to promise that this specific juncture will be publicly available—that would be a better question for ComEd.

Marissa Strassel (MUSE) Kailee Whitehouse (VEIC), – IQ TRM Working Group

- Agenda
 - TRM Overview
 - IQ TRM Working Group Objectives
 - IQ TRM Working Group Work to Date
 - Engaging with CBOs and CAAs
- TRM Overview
 - What is the Technical Reference Manual?
 - Purpose: provide transparent and consistent basis for calculating energy generated by the State of Illinois' energy efficiency programs
 - TRM is filed each year with the ICC as a consensus document
 - Made of 4 volumes: Overview, Commercial, Residential, Cross-cutting and Attachments
- TRM Process
 - Exists for efficiency optimization, accountability for how funds are spent
 - Technical Advisory Committee is convened each year to discuss issues, prioritize updates, and update TRM based on new information
 - Filed each year with ICC
- TRM Update Cycle
 - Feb: Identify Updates
 - Mar: develop prioritized lists
 - Apr: Develop workpapers
 - May/Jun: Review work papers
 - Sep: 3rd and final draft
- Why and IQ Working Group?
 - Need for improved engagement with the IQ Program implementers and advocates
 - Ensure decisions on the TAC help to ensure that IQ communities' needs are being met

- IQ TRM Working Group Objectives
 - Early warning system to CBO/CAA
 - Explore IQ focused changes and issues in the TRM
 - Support development of measure changes or updates
 - Solicit feedback through existing channels from other stakeholders
- 2021 + 2022 Achievements
 - Provided overview of TRM policies and process
 - Convened Sixteen Working Group meetings
 - Reached 35+ organizations for feedback
 - Identified key issues in TRM based on working group feedback
 - Identified data and evaluation needs
- Proposed 5 measure updates to the TAC
 - ISR updates for IQ Kits –
 - Mobile home specific furnace costs
 - Furnace Blower Retrofit Cost
 - Air Handler Filter Cleaning/Replacement (Requested by IQ committee)
 - Tree Planting
- What's Next?
 - Next IQ Working Group Meeting Tuesday, December 13th
 - Discuss next year workplan and schedule
 - Survey participants for feedback
 - Review survey feedback
 - Review Survey feedback
 - Adjourn working groups for 2022
 - Finalize scope and schedule for next year (**including key moments for CBO and CAA Participation**)
 - Kickoff 2023 IQ TRM Working Groups