**Illinois Income Qualified South Energy Efficiency Committee**

**(IL IQ-S EE Committee or “LIEEAC):**

**Education and Outreach Plan**

**Ver. 2.0d (Updated May 22, 2023)**

1. **Background: Committee Outreach Plan**

In 2022, the core purpose of the IL IQ-S EE Committee Outreach Plan is to:

* **Identify and engage the broad range of organizations identified in CEJA as Committee members. Organizations eligible to participate in the Committee include:**
  + The electric utilities subject to the requirements of this Section,
  + The gas utilities subject to the requirements of Section 8-104 of this Act,
  + The utilities' low-income energy efficiency implementation contractors,
  + Nonprofit organizations,
  + Community action agencies,
  + Advocacy groups,
  + State and local governmental agencies,
  + Public-housing organizations, and
  + Representatives of community-based organizations (CBOs), especially those living in or working with environmental justice communities and BIPOC communities. CBOs also include community action agencies.
* **Build awareness and understanding** of *low-income and public-housing energy efficiency programs* offered by the IQ-S Committee participating utility (Ameren Illinois) so that Community Based Organizations (CBOs) and other Committee members can provide meaningful and thoughtful recommendations on the design, implementation, and evaluation of these programs. CBO input is intended to result in low-income programs that more effectively meet the needs of under-resourced communities, particularly those in environmental justice and BIPOC communities.
* **Increase knowledge of low-income energy efficiency and other “related efforts”** including, but not limited to, Illinois Solar for All and bill assistance programs.
* **Foster awareness of and capacity building to enable CBOs** to secure and leverage federal, state and private funding and initiatives to supplement finite utility ratepayer funding to further help under-resourced customers manage and lower their energy bills.
* **Create awareness of and motivate** **CBOs to apply for education and outreach grants** so that CBOs can offer energy efficiency education and outreach which includes but is not limited to, basic energy efficiency education, information about low-income energy efficiency programs, and information on the IQ-S EE Committee's purpose, structure, and activities.
* **Foster sharing of best practices and CBO relationship-building** to improve offerings and extend services to populations who are under-resourced, historically underserved and most impacted by high energy bills.

**Prior Outreach Experience**: The concepts and content of this draft Outreach Plan borrow heavily from experience with CBO/CAA outreach during the IQ Energy Efficiency Advisory Committee Process under the Future Energy Jobs Act (FEJA).

1. **Outreach Strategies**

With an emphasis on building sustained and increasing engagement with trusted community partners through the IQ-S EE Committee, the following strategies will be utilized throughout the outreach process:

* Coordinate closely with utility EE and bill assistance education and outreach efforts, the IL Solar for All Program and Other Organizations Who Offer Energy Efficiency Education and Outreach: Establish a coordinated approach to education and outreach to increase impact of education and outreach efforts.
* Further Develop and Refine Outreach & Education Tools and Initiatives:
  + Develop and track effectiveness of outreach email solicitations and an IQ-S Committee website that educates CBOs and CAAs about the goals, value and opportunities offered through the Committee and energy efficiency and other opportunities for low-income customers to lower and manage their energy bills.
  + Coordinate development of, and refine based on customer feedback, education materials on energy efficiency education, conservation, solar and bill assistance programs.
* Identify & conduct research on eligible IQ-S Committee participant organizations, with focus on BIPOC and Environmental Justice CBOs to develop a diverse but representative slate of Committee members:
  + Geomap promising organizations that may have programs that could be used to leverage EE outreach efforts to ensure geographic representation.
  + Utilize data on high concentration of IQ populations and environmental justice communities to determine priority areas for outreach to CBOs and CAAs.
* Build additional CBO relationships: Reach out to targeted non-participating and previously uncontacted CBOs through education and outreach efforts, one-on-one meetings, and other events.
* Track participation and engagement over time to measure value and benefits of participating in the IQ-S Committee**:** Continue to track IQ-S Committee Member and Leadership Team participation at meetings, analyze meeting attendance, evaluate benchmarks for ‘strong participation,’ and recommend changes accordingly. In addition, use qualitative feedback, such as one-on-one meetings and surveys, to solicit feedback from CBOs on whether the Committee process is improving service to their communities.
* Generate feedback & new ideas: Generate Committee ideas and recommendations on the current and future IQ program EE and related programs.
* Build trust and awareness of IQ programs: Improve awareness and understanding of the benefits of IQ programs and facilitate trust and confidence-building between utility EE offerings and IQ community members.
* Build trust and awareness between CBOs, IQ-S Portfolio Administrators and “Stakeholders” so that the IQ-S Committee can effectively and collaboratively work together to continuously improve offerings for low-income customers and their communities to them manage and lower their bills in this era of steeply rising energy costs.

1. **Outreach Principles, Observations and Practices**

* General observations about CBOs that may impact effective approaches to outreach and education. The observations below relate both to outreach to engage CBOs to effectively participate in the IQ-S Committee, and also to providing grants to CBOs so CBOs provide education and outreach to their local communities.

Outreach to CBOs:

* + Staff Shortages: CBOs are often short-staffed, with limited additional capacity for new information and initiatives.
  + Staff Retention: In addition, some CBOs, have difficulty retaining staff due to lower salaries and less support than the private market.
    - High turn-over may require ongoing staff education.
  + Executive Director Buy-In: Effective engagement in the Committee generally requires gaining “buy-in” from the Executive Director, not just Staff.
  + Listening first: CBOs are often not interested in listening to messages about energy efficiency unless the organization’s mission and community is well-understood by the messenger, and the messenger spends time in the community and listens to its concerns.
  + Ongoing Outreach Required: Outreach requires ongoing, sustained effort to gain regular and effective participation by CBOs.
  + Importance of Coordinating Outreach Efforts Across CBOs**:** CBOs frequently report becoming overwhelmed and confused when contacted by multiple organizations with efficiency and/or clean energy messages and initiatives. They may be contacted by utilities, utility implementers, and multiple initiatives relating to “clean energy.” Thus, it is important to understand who is contacting various CBOs and coordinate messaging and outreach appropriately.

Engaging CBOs to provide outreach to their local communities

* + CBO administrative infrastructure is generally very underdeveloped compared to the private sector, including contracting, invoicing, Information Technology, cyber-security protections (ability to protect customer information).
    - CBOs may need help responding to solicitations, contracting efficiently, setting up tracking systems to track effectiveness, protecting customer information and invoicing/reporting.
  + CBOs often seek to provide “wrap-around” services to customers who seek help from them – so low-income customers may receive more comprehensive service working with CBOs compared to firms that focus exclusively on energy-efficiency services and messaging.
  + CBO outreach typically relies on local labor, thus keeping funds used for outreach in the local community.
  + CBOs may be able to leverage existing CBO activities to co-promote efficiency messaging, which can lower outreach costs.
  + CBOs are generally “trusted voices” within their communities and may best understand how to message offerings and build trust and knowledge.

1. **Outreach Timeline**

Outreach is an ongoing effort. The plan and timeline for 2022 year is below:

* Phase 1: Expanding List of Organizations and Contacts to Cover CEJA-Named Committee Participants; Initial Outreach (March – July 2022)

Significantly expand list of CBOs, research and document organizational missions, develop list of organizations to contact, contact organizations to provide overview of committee and identify relevant staff and activities.

Set up tool to effectively disseminate information and track responses (MailChimp).

Develop Outreach tools and template, including Committee website and Membership Applications for Stipend-Eligible and Stipend Ineligible Committee Members.

* Phase 2: Seek CEJA-Eligible Committee Participants to Submit Membership Applications (Stipend Eligible and Stipend Ineligible) (October 13 – December 5, 2022 – Priority Applicants)

Notify potential IQ-S Committee participants developed in Phase 1 about IQ-S Committee Membership applications (for eligible Committee members) and grant opportunities (for stipend-eligible members.)

Follow-up on initial emails to encourage and support submitting membership and grant applications.

Continuously update Master List of Committee-Eligible Participants and Master Distribution List with new organizations.

* Phase 3: Develop Metrics, Monitoring and Engagement Strategy to Maintain IQ-S Committee Member Engagement Through 2023 (ongoing)

Track meeting participation and attendance levels, have follow-up conversations on barriers to participation, adjust strategy and meeting process accordingly. This will be ongoing.

Develop metrics to measure IQ-S Committee engagement and strategies to maintain IQ-S Committee engagement for IQ-S Committee participants. However, IQ-S Committee participation and engagement is ultimately the sole responsibility of the participating organization.

Further details including the full Committee distribution list and organizational information developed in Phase 1, a list of CBOs that may be effective Committee Members, sample questions and talking points are found in the appendix.

**Appendices:**

1. Master List of Committee-Eligible Participants and Master Distribution List (Continuously Updated)
2. Select List of Promising CBOs to Target for Committee Membership
3. Approach to Coordination with Other Organizations Who Are Expected to Perform Energy Efficiency Education and Outreach
4. Sample Discussion Points with Prospective Committee Members

**APPENDIX I: Master List of Committee-Eligible Participants and Master Distribution List (Continuously Updated)**

**Master List of Prospective IL IQ EE Committee Eligible Organizations (Stipend Eligible and Stipend Ineligible)**

Attached is the “master” distribution list that FutEE Staff created through extensive FutEE Staff research to identify potential IL IQ EE Committee members, research into mission and work of different organizations, identifying and in some cases reaching out to key contacts who might be interested in and appropriate for the IL IQ EE Committee. The outreach started in Q1 2022 and is ongoing.

The information is contained in a master Workbook and is organized into twenty-eight (28) separate Worksheets.

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**IQ Committee EE Distribution List**

Attached is the most current distribution list for the IQ EE Committee. The distribution list was uploaded into a mail distribution program (“MailChimp”) that has several advantages over distribution lists stored in Excel then imported into Outlook calendar requests for meeting and materials distribution, including:

1. Distribution to Large Lists Occurs Without “Bouncebacks” – Servers, particularly very secure servers such as utility servers, often reject e-mails with very long lists of recipients.
2. Allows Material Distribution Without “Bouncebacks” – Servers will often reject e-mails distributed with materials if sent to distribution lists in Outlook.
3. Allows Recipients to Accept Meetings on Their Calendars, Rather Than Having Calendar Invites Automatically Placed on a Recipients Calendar – Using Outlook meeting distributions “automatically” posts meetings on recipients’ calendars, regardless of whether the recipient would like to have the meeting request on their calendar. Mailchimp allows recipients to determine whether they would like to have meetings posted on their calendar, as the recipient must affirmatively download the calendar invite to their calendar.
4. Allows for Analytics – Mailchimp enables analytics associated with e-mail campaigns, such as how many recipients and who opened the target e-mail.
5. Allows Individuals to Add and Delete their Names Automatically from Distribution Lists – Mailchimp allows individuals to automatically add and delete their names from distribution lists.
6. Hides Full Distribution Lists from Recipients – Mailchimp “hides” the distribution list from individual recipients so that the distribution lists cannot be used for purposes other than IL IQ EE Committee business and/or inappropriate distribution of material from the Committee.

**Appendix II: Select CBOs Organizations to Solicit for Committee Membership**

Below is a select list of CBOs to target for Committee Membership representative of different BIPOC communities, environmental justice communities and geographic regions. The “Master” list of prospective Eligible Committee Members, above, contains many other candidate CBOs/CAAs and other organizations identified by CEJA as eligible IQ EE Committee Members.

1. **Springfield Urban League**
   * Location: Springfield, IL
   * Line of Work: The Springfield Urban League, Inc. is a nonprofit, nonpartisan, civil rights and community-based movement that serves nearly 9,000 people annually, providing direct services, research and policy advocacy to assist individuals and communities in reaching their fullest potential. Primarily working with African Americans, Hispanics, and other emerging ethnic communities, it is networked with over 100 professionally staffed affiliates in over 35 states across the nation.
2. **IL NAACP**
   * Location: East St. Louis, IL
   * Line of Work: The mission of the National Association for the Advancement of Colored People is to ensure the political, educational, social, and economic equality of rights of all persons and to eliminate race-based discrimination. ​They are one of the nation’s oldest, largest, and most widely recognized grassroots-based civil rights organization. Given recent headlines stating the NAACP’s concerns over environmental injustice in their communities, they may serve as a valuable partner for outreach and low-income program targeting.
3. **Lutheran Social Services of IL** – FEJA workforce training community implementer
   * Location: West Peoria, IL
   * Line of Work: Lutheran Social Services of Illinois provides supportive services for children in need and their families. Foster care services focus on placing children who have experienced neglect or abuse in a loving and secure home. Children's Community Services offers numerous other services to at-risk children and their families in their communities. They currently partner with Elevate Energy on an employment skills and solar installer training for returning citizens, foster care alumni, and veterans in the Marion/Carbondale region
4. **Ecology Action Center** – IL Solar for All partner
   * Location: Greenup, IL (McLean County)
   * Line of Work: The Ecology Action Center works to inspire and assist its community in creating, strengthening, and preserving a healthy environment. The EAC acts as a central resource for environmental education, information, outreach, and technical assistance. They are a partner with Illinois Solar for All and will carry out various outreach methods to make residents aware of programs related to energy and workforce development.
5. **Prairie Rivers Network** – IL Solar for All partner
   * Location: Chicago, IL (Cook County)
   * Line of Work: Prairie Rivers Network works to protect and restore rivers, return healthy soils and diverse wildlife to the land, and transform how we care for the earth and each other. Current projects focus on the following area: clean water, the water-energy nexus, water and farming, and rivers & wildlife. They now serve as an Illinois Solar for All partner and will perform outreach to help low-income residents get involved with energy savings and workforce programs.
6. **Peoria Economic Development Council** 
   * Location: Peoria, IL (Peoria County)
   * Line of Work: The Greater Peoria Economic Development Council drives economic growth in Greater Peoria through targeted business and talent development and attraction.
7. **First Followers** 
   * Location: Champaign, IL (Champaign County)
   * Line of Work: First Followers is a community-based organization that operates a drop-in center located at Bethel A.M.E. Church. Although not a religious based program, Bethel's pastor, Larry Lewis, and his congregation provide a space for: peer mentoring, job readiness and assistance programs, advocacy for individuals with felony convictions, family reunification, service referrals, and a safe stigma free environment.
8. **Illinois People Actions** 
   * Location: Bloomington, IL (McLean County)
   * Line of Work: IPA is downstate Illinois' largest faith-based community organization. It works with local grassroots and faith leaders on wide variety of justice issues which currently comprise of community and family economic security (protecting retirement security and fighting payday/car title lending), immigration reform and environmental justice.
9. **Sustain Rockford – Illinois Solar for All partner**
   * Location: Rockford, IL (Winnebago County)
   * Line of Work: Sustain Rockford exists to help create a community of interest for a sustainable Rockford region’s future. They currently serve as a “grassroots educator” under the Illinois Solar for All program and will be engaging stakeholders through organized events, education and outreach efforts that promote clean energy access to low-income communities.
10. **Claretian Associates**
    * Location: South Chicago – Chicago, IL (Cook County)
    * Line of Work: Claretian provides affordable housing and vital services that benefit the safety and wellbeing of South Chicago residents and families. It has developed, managed or owned over 250 unities of affordable housing with 85 more in pre-development and has employed over 600 residents in youth and safety programs.
11. **Casa Central**
    * Location: Chicago, IL (Cook County)
    * Line of Work: Casa Central is the largest Hispanic social service agency in the Midwest. Through comprehensive, family-centered programming, Casa Central is the conduit through which thousands of individuals build hope for the future while equipping themselves to achieve a sustainable, higher quality of life for the benefit of self, family, community and society.
12. **Chicago Bungalow Association**
    * Location: Chicago, IL (Cook County)
    * Line of Work: CBA is a nonprofit delegate agency that helps its members remedy common problem with vintage homes, preserve their investments, redesign homes to fit their lifestyle, and save money & extend the life of homes by making them more energy efficient. CBA is an active IQ participant that has expressed commitment and potential to expand its IQ services.
13. **Southeast Environmental Task Force**
    * Location: Chicago, IL (Cook County)
    * Line of Work: SETF is an environmental nonprofit organization dedicated to serving the southeast side and south suburbs of Chicago by promoting environmental education, pollution prevention, and sustainable development. The organization works to make southeast Chicagoland a national and international model for the integration of industrial, residential and natural areas into a productive, green, and environmentally sustainable urban community.
14. **Inner-city Muslim Action Network**
    * Location: Chicago, IL (Cook County)
    * Line of Work: IMAN is a community organization that fosters health, wellness and healing in the inner-city by organizing for social change, cultivating the arts, and operating a holistic health center. The organization models an integrative approach that employs holistic interventions to address a spectrum of structural and systemic injustices impeding a dignified quality of life for people in marginalized communities.
15. **Pilsen Environmental Rights and Reform Organization** 
    * Location: Chicago, IL (Cook County)
    * Line of Work: PERRO advocates for the health and safety of the Pilsen community by: Informing residents about the health dangers of pollution from all sources in Pilsen; working with the city departments, the EPA, and elected officials at the all levels to develop a solution for reducing pollution and making Pilsen a cleaner place to live, work, and breathe; achieving a significant reduction in pollution from industrial sources in Pilsen; achieving this clean up without causing industrial jobs or business to be lost.
16. **Centro Romero**
    * Location: Chicago, IL (Cook County)
    * Line of Work: For over 35 years, Centro Romero has served the refugee immigrant population on the northeast side of Chicago with programs including the Youth Learning and Leadership Program, Family Services (encapsulating the Domestic Violence Prevention Program, the Public Benefits Program, and the New Americans Initiative), Adult Education, and Legal Services.
17. **Chinese Mutual Aid Association**
    * Location: Chicago, IL (Cook County)
    * Line of Work: CMAA is a community-based social services agency targeting the low-income immigrant and refugee community and offering after-school youth programs, mentoring and sports leagues, adult education, and services that support housing, health, and job placement.
18. **Habitat for Humanity**
    * Location: Illinois
    * Line of Work: Habitat for Humanity brings people together to build homes, communities, and hope with a vision of a world where everyone has a decent place to live. In Chicago, it develops physical and social assets to strengthen neighborhoods with the goal of creating stability for the 4 in 10 Chicagoans living in declining conditions.

**APPENDIX III:** **Approach to Coordination with Other Organizations Who Are Expected to Perform Energy Efficiency Education and Outreach**

Several organizations and entities in Illinois are expected to provide general energy education and outreach. To improve alignment, avoid market confusion and leverage education and outreach efforts across various organizations, the Facilitation Team will seek to work with Utilities, the IL Solar for All Program, CAAs who offer LIHEAP and IHWAP, and the Illinois Environmental Protection Agency Office of Energy, to coordinate on the following topics:

* + Outreach and Education Messaging: What are core messages/goals of the low-income and public housing energy efficiency program outreach and education?
  + Materials: What materials will be used? Will the organization share the materials? Have all the claims in the materials relating to energy savings, health, safety and performance been sufficiently documented consistent with state and federal requirements?
  + Organizations Performing Outreach and Education: What organizations will perform outreach and education?
  + Outreach Targets: What communities will be targeted?
  + Education and Outreach Goals and Metrics: What goals and metrics will be used to track education and outreach outcomes?
  + Customer Feedback/Surveys: Will customer feedback on the effectiveness of the education and outreach be sought? Would the organization be willing to share any customer feedback?
  + EM&V: Will the education and outreach be the subject of an evaluation, measurement and verification study?
  + Best Practices/Lessons Learned: Would the organization be willing to share best practices/lessons learned?
  + Tracking: Will the location and number of customers reached be tracked? Will the organization be willing to share this information?
  + Customer Data Collection: What customer information will be collected during the education/outreach campaign? Will any information besides name, address, and basic demographics be collected? (Such as Social Security Numbers, health status, credit card information, etc.)? Will all customer information be securely stored, including encryption if electronically stored?

**APPENDIX IV: Sample Outreach Discussion Points**

The following questions are a general guide for engaging with prospective CBO IQ-S Committee Members during outreach. Information about the IQ-S Committee should align with information on the IL IQ-S EE Website. [IQ Energy Efficiency Committee (LIEEAC) (iqadvisorycommittee.com)](https://www.iqadvisorycommittee.com/)

Introduction

1. Provide overview of IQ-S Committee.

About the CBO and its Community

1. We would like to learn more about your organization – please describe your organization’s core goals and activities.

[NOTE: Refer to prior research on the organization, as described in the “Master List of Committee-Eligible Participants”]

1. Please describe the community your organization serves.
2. Does your organization ever get customer questions about their energy bills and how to manage them? If yes, please describe and how to you respond?
3. What are the energy needs of your community?
4. What are the barriers to addressing these needs?
5. Does your organization have any energy or public housing-related initiatives?
6. Does your organization perform any community education and outreach?
7. Do you have any programs that could be used to leverage energy efficiency education and outreach?
8. Does your organization perform any workforce development?

Current CBO Experience with Low-Income EE and Public Housing Programs

1. Are you aware of any utility-funded and/or state-funded energy efficiency programs serving low-income customers? Would you like to know more?
2. What are the different elements of the programs that are working well?
3. Are you aware of improvements that could be made to low-income energy efficiency and public housing programs?
4. Would your organization be interested learning more about energy efficiency?
5. Has your organization ever done education and/or outreach on energy efficiency? If so, please describe.
6. How can current marketing and outreach publicizing the programs be more effective?

Additional Questions to Consider (if Organization Interested in Further Discussion)

1. How do you think energy efficiency can benefit your community?
2. If your organization has performed outreach or implementation for EE, what has worked well? What has not? Would you be willing to share with other CBOs?
3. Would your organization be interested in participating in the IQ-S EE Committee?
4. Would your organization be interested in performing EE education and outreach?
5. If you are interested in IQ-S Committee participation and/or receiving a grant for education and outreach, what support would be helpful to your organization to enable participation?
6. What are the best channels to get information out in your community?
7. What is the best way to communicate with you?

IQ-S Participation

1. Will you have trouble attending IQ-S Committee meetings? Please be aware that eligible CBOs will receive stipends for participation.
2. If you cannot attend IQ-S Committee meetings, are there other ways to engage with and get feedback from your organization on topics the Committee is covering?
3. Are there any other barriers to your participation? How may we address them?
4. Would you be willing to participate instead in smaller group meetings along with other organizations?
5. Would you be interested in an Energy Efficiency 101 Webinar to learn more about energy efficiency?

**Appendix IV: Key Talking Points**

Individuals and organizations who seek to provide information on the IL IQ-S EE Committee’s purpose, structure and activities should be prepared to address the following key talking points. Information on all of the talking points, below, can be found on the IL IQ-S EE Committee’s website at: [IQ-S Energy Efficiency Committee (LIEEAC) (iqadvisorycommittee.com)](https://www.iqadvisorycommittee.com/)

1. Describe the core purpose of the IQ-S Committee (based on language in CEJA).
2. Describe who is eligible for IQ-S Committee Participation (based on language in CEJA).
3. Describe stipend eligible committee participants (based on language in CEJA).
4. Discuss Key Substantive Issues identified by the IQ-S Committee (see list on IQ-S Committee website).
5. Solicit input from the prospective IQ-S Committee member on topics related to low-income energy efficiency and public housing programs that may interest them.
6. Identify participation requirements for IQ-S Committee participation (See Membership Application on “Resources” tab on the IQ-S Committee website).
7. Discuss the education and outreach grants available to stipend-eligible IQ-S Committee participants. Identify the CEJA-identified topics eligible for education and outreach grants.
8. Explore whether the individual/organization has any barriers to IQ-S Committee participation, and what the Committee could do, if anything, to address those barriers.
9. Identify who within the organization would be a “qualifying” committee participant - ideally the Executive Director or a senior person in the organization.