

**Illinois Energy Efficiency Stakeholder Advisory Group  
Large Group Meeting – Day 2  
Joint with Income Qualified EE Advisory Committee  
Wednesday, June 17, 2020  
2:00 – 4:00 pm**

Teleconference Meeting

**Attendee List and Meeting Notes**

**Meeting Materials – Wednesday, June 17 Meeting**

- Meeting website page: [June 17 Meeting](#)
- [Wednesday, June 17 Joint SAG + IQ EE Advisory Committee Agenda](#)
- [SAG Policy Proposal: Income Eligibility Verification for Low Income Customers](#)
- [Energy Efficiency Ideas Tracking Spreadsheet – Initial Utility Responses \(Excel\)](#)

**Wednesday, June 17 Meeting Attendees (by webinar)**

Celia Johnson, SAG Facilitator  
Samarth Medakkar, Midwest Energy Efficiency Alliance (MEEA) – Meeting Support  
Laura Agapay-Read, Guidehouse  
Diane Alford, Kendall County Community Action Agency  
Matt Armstrong, Ameren Illinois  
Jean Ascoli, ComEd  
Tyler Barron, Environmental Law & Policy Center  
Bob Baumgartner, Leidos  
Marsha Belcher, Community Action Partnership of Lake County  
Jordan Berman-Cutler, ComEd  
David Brightwell, ICC Staff  
Kate Brown, Elevate Energy  
Laraine Bryson, Tri-County Urban League  
Tom Buhlig, Morgan County  
Patrick Burns, Brightline Group  
Tisha Burnside, Resource Innovations  
Madeline Caldwell, CLEARResult  
Jill Calkins, TCO  
Lauren Casentini, Resource Innovations  
Sue Castleman, BCMW  
Theresa Collins, Senior Services Plus  
Salina Colon, CEDA  
Andrew Cottrell, Applied Energy Group  
Tim Cycyota, CLEARResult  
Naomi Davis, Blacks in Green  
William Davis, Bronzeville Community Development Partnership  
Larry Dawson, IL Association of Community Action Agencies  
Leanne DeMar, Nicor Gas  
Mark DeMonte, Whitt-Sturtevant, on behalf of Ameren IL  
Kevin Dick, Delta Institute  
Atticus Doman, Resource Innovations  
Gabriel Duarte, CLEARResult  
Margaret Dugger, Madison County Community Action Agency  
Deb Dynako, Slipstream  
Wael El-Sharif, 360 Energy Group  
Alan Elliott, Opinion Dynamics  
Katherine Elmore, Community Investment Corp.

Lance Escue, Ameren Illinois  
Natalie Fortman, Opinion Dynamics  
Scott Fotre, CMC Energy  
Michael Frischmann, Ecometric Consulting  
Margaret Garascia, Elevate Energy  
Omayra Garcia, Peoples Gas & North Shore Gas  
Aimee Gendusa-English, Citizens Utility Board  
Jenny George, Ameren Illinois  
Laura Goldberg, NRDC  
David Goodrich, Madison County Community Action Agency  
Paul Grimyser, ComEd  
Mary Ellen Guest, Chicago Bungalow Association  
Gabriel Guevara, Elevate Energy  
Randy Gunn, Guidehouse  
Vince Gutierrez, ComEd  
David Hernandez, ComEd  
Amir Haghghat, CLEAResult  
Paulette Hamlin, Western Egyptian E.O.C.  
Jim Heffron, Franklin Energy  
Travis Hinck, GDS Associates  
Julie Hollensbe, ComEd  
Jim Jerozal, Nicor Gas  
Amy Jewel, Elevate Energy  
Mary Johnson, Resource Innovations  
Cheryl Johnson, People for Community Recovery  
Marisa Joyce, Elevate Energy  
Kristen Kalaman, Resource Innovations  
Lalita Kalita, ComEd  
Haley Keegan, Resource Innovations  
Morgan Kelley, Resource Innovations  
Mike King, Nicor Gas  
John Knuth, CLEAResult  
Chester Kolodziej, Northern IL Summits and Expos  
Karin Konrath, ComEd  
Larry Kotewa, Elevate Energy  
John Lavallee, Leidos  
Monique Leonard, Ameren Illinois  
Sharon Lewis, Meadows Eastside  
Bruce Liu, Nicor Gas  
Molly Lunn, ComEd  
Karen Lusson, National Consumer Law Center  
Dan Maksymiw, CEDA  
John Mascarenhas, CLEAResult  
Marlon McClinton, Utilivate  
Leanna McKeon, Chicago Housing Authority  
Brady McNall, DNV-GL  
Rebecca McNish, ComEd  
Nishant Mehta, Guidehouse  
Tim Melloch, Future Energy Enterprises  
Mark Milby, ComEd  
Cheryl Miller, Ameren Illinois  
Abby Miner, IL Attorney General's Office  
Lisa Miranda, Rebuilding Together Metro Chicago  
Anne Mitchell, Jenner & Block, on behalf of Nicor Gas  
Zenia Montero, ICF  
Bruce Montgomery  
Jennifer Morris, ICC Staff  
Jackie Nagel, Nicor Gas  
Chris Neme, Energy Futures Group, on behalf of NRDC

Rob Neumann, Guidehouse  
Yami Newell, Elevate Energy  
Dantawn Nicholson, ComEd  
Victoria Nielsen, Applied Energy Group  
Greg Norris  
Lorelei Obermeyer, CLEAResult  
Randy Opdyke, Nicor Gas  
Antonia Ornelas, Elevate Energy  
Erika Orr, Sangamon County Community Action Agency  
Angie Ostaszewski, Ameren Illinois  
Briana Parker, Elevate Energy  
Patricia Plympton, Guidehouse  
Christina Pagnusat, Peoples Gas & North Shore Gas  
Ashley Palladino, Resource Innovations  
Deb Perry, Ameren Illinois  
Michael Pittman, Ameren Illinois  
Mick Prince, DCEO  
Beatrice Quach, Resource Innovations  
Andrew Rains, IACAA  
Joe Reilly, Applied Energy Group  
Alberto Rincon, Future Energy Enterprises  
Stephanie Robinson, Ameren Illinois  
Susan Sams, Ameren Illinois  
Gustavo Sandoval, Elevate Energy  
Brooke Scanlon, West Monroe Partners  
Louise Sharrow, Elevate Energy  
Ron Siddle, CMC Energy  
Kristol Simms, Ameren Illinois  
Raman Singh, ICF  
Veena Singla, NRDC  
Holly Spears, SEEL  
Samantha Stahl, Ameren Illinois  
Jacob Stoll, ComEd  
Mark Szczygiel, Nicor Gas  
Tiffany Tabrizi, Rebuilding Together Metro Chicago  
Harsh Thakkar, Franklin Energy  
Pastor Booker Vance, Elevate Energy  
Desiree Vasquez, Franklin Energy  
Andy Vaughn, Ameren Illinois  
Ted Weaver, First Tracks Consulting, on behalf of Nicor Gas  
Shelita Wellmaker, Ameren Illinois  
David Whittle, Leidos  
Bridget Williams, Guidehouse  
Nicholas Wood, Anura Energy  
Ken Woolcutt, Ameren Illinois  
Fred Wu, Aiqueous  
Cate York, Citizens Utility Board  
Angie Ziech-Malek, CLEAResult  
Liz Zimmerly, ComEd  
Theo Okiro, Future Energy Enterprises  
John Pady, CEDA  
Arvind Singh, DNV-GL  
Chris Vaughn, Nicor Gas  
Sara Wist, Cadmus Group

## Opening & Introductions

*Celia Johnson, SAG Facilitator*

The purpose of the June 17 SAG meeting:

1. To educate SAG and IQ EE Advisory Committee Participants about a new income qualification guidelines policy proposal, in response to COVID-19.
2. For utilities to provide an initial response to income qualified/income eligible Energy Efficiency Idea proposals presented during the joint meeting on May 13.

## Income Qualification Guidelines Policy

*Kristol Simms, Ameren Illinois*

- **Context:** Utilities and non-financially interested parties met recently to discuss regulatory impacts of utility EE due to COVID-19. Ameren raised the need for a policy change in IQ program eligibility as a result of the COVID-19 pandemic.
- **Purpose:** Policy is necessary due to financial impact on Illinois utility customers including impacts from shelter-in-place orders and the cease in business activity. Ameren received a few hundred survey responses from customers, categorized from fair-poor financial situation to excellent financial situation. In the last week of May, the % of customers negatively impacted by COVID-19 was consistently high – 73%. Of these customers, 35% said they know how to seek financial assistance to support them. It seems like things are opening back up, financials will improve, but most recent surveys show that half of Ameren’s customers who took the survey had been negatively impacted, and  $\frac{3}{4}$  are worried about paying their utility bill and need assistance. Only Ameren customers but this is an early marker of economic impact.
- **More info on proposal:** We should make it easier for customers to participate in programs. While it seems easy to get verifiable documentation of income – it may not be. Financial situations change significantly due to COVID. Customers may not have a w-2 to back up their current financial situation. The amount of documentation required in this process is becoming a cybersecurity liability. Especially considering Ameren is looking to work with non-traditional partners in this space. For example, churches – cybersecurity requirements may not be feasible. Ameren is trying to identify a way to self-verify that a customer has been financially impacted by COVID-19.
- **Timeline:** Policy would be effective June 2020 – December 2021; utilities discretion to rely on oral or written self-verification from customers that they have experienced economic hardship.
- **Implementation:** There is interested in expanding how customers are offered programs. For example, churches, food banks, customer service line – hardship hotline would be an opportunity to market energy efficiency programs. Intent is not to qualify customers for weatherization at this time; that edit to the policy will be made as a follow-up.

Q&A:

*[Cate York] This makes sense. Is it possible to share the survey data? Alluded to specifying this language – would this apply to only certain programs?*

*[Kristol Simms] We can't share specific survey data but can share high-level points. Cannot speak to all IQ programs offered by other utilities. Would think that characterizing*

as DI-type (direct install) measures would be the target programs. If customers wanted to participate in weatherization, they would need to have to income verification and would have to share information on new financial concerns on a case by case basis.

[Kevin Dick] We have been looking at this for a few years. Are you proposing to ask a customer's annual or 30-day income? Or other indicators of hardship? I can follow-up with info on how to do this securely and electronically.

[Kristol Simms] This type of verification makes sense for a long-term solution. Especially if the customer is recently in a challenging financial situation, it's difficult to verify. That questioning could limit the ease of administration. I.e. volunteer at a church to track verbal verification on income; may be difficult to quantify on the spot; etc.

[Kevin Dick] I agree. We got around this by using API hits against trade-line and non-tradeline sources to develop eligibility through a sample of customers. Allows those without income or irregular income to participate. Usually you need this available. You can run algorithms to see if a customer is at risk and target program. Could develop codes for program administrator to use. Agree on reducing paper verification.

[Kristol Simms] Would love to hear your ideas going forward.

[Yami Newell] Has the IQ EE program assessment that Ameren performs been reserved in any capacity. Is there a plan to restart this work?

[Kristol Simms] Ameren launched a program that would provide an energy kit and virtual assessment to customers. Working with allies to develop health and safety plans for reengaging customers in the home. Implementer is in the process of reviewing. There are some final steps left.

[Laura Goldberg] How would this work on MF side? How would this filter up into the broader program? If one tenant needs assistance, it's likely the whole building will need it.

[Kristol Simms] We thought about this. Barring the possibility of somebody taking advantage of a program twice, I don't see us differentiating between renters of SF and MF, or owner of SF unit. Those showing up in community events where I am envisioning this, live in all sorts of housing. As Ameren develops program offerings, we have to consider the type of housing. But there are some more universal measures. If there's a MF unit that we know that have a large number of people needing assistance, they could work with the property manager or wonder to deliver programs in that way.

[Laura Goldberg] Doesn't mean a differentiation on who gets kits, but how it connects with the broader work. If one tenant needs assistance, it's conducive to make the connection with all the tenants.

[Cate York] Are there efforts for a joint kit offering? Nicor is offering non-IQ kits. What's the possibility for coordination?

[Kristol Simms] We are coordinating with Nicor on kits. I can't speak to COVID-19 impacts but we work with Nicor where there's overlap.

*[Marlon McClinton] Working in this particular sector of low income, appreciative of the lens on an expanding low-income sector. I am concerned with the install rate of DI install and DIY installs. How to ensure we're successful on this? Commends Ameren's sensitivity in this area.*

*[Kristol Simms] We are offering kits with a layered verification approach. Customer can verify through postcard, or through virtual verification. Beyond that, ODC can provide more information.*

*Follow-up provided by ODC after the meeting:* The question was on concerns with in-service rates for kits mailed to customers or provided to them via community events; generally, situations where there is less of a guarantee about what customers will do with the kit measures. Opinion Dynamics has been working closely with Ameren IL in the design and initial launch of this effort to advise them on any evaluability concerns, including ISRs. Generally, we are supportive of the use of a direct install ISR when implementation can provide defensible proof (via virtual audits, photos from customers, sign off forms, etc.) that measures were installed.

**Next steps: Utilities and non-financially interested stakeholders will have a follow-up discussion on policy language.**

## **Utility Responses to Energy Efficiency Idea Proposals**

- *Kristol Simms and Matt Armstrong, Ameren Illinois*
- *Molly Lunn, ComEd*
- *Mike King, Nicor Gas*
- *Omy Garcia, Peoples Gas & North Shore Gas*

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**Idea:** *Light up the Night /Renewed Porch Light Campaign*

**Proposed by:** **Meadows Eastside Community Resource Organization**

### **Utility Responses**

- **Ameren IL:** Focus of this idea is on Northern utilities, but AIC liked the concept. AIC has reached out to Sharon and will try to identify organizations in their service territory to explore this idea.
- **ComEd:** We see the benefits in safety. Would like to marry this with other IQ outreach offerings or kits; definitely interested in exploring further
- **Nicor Gas:** N/A
- **PG/NSG:** N/A

### **Q&A:**

*[Sharon Lewis] Upon further research, the Green Light Corp already has an energy efficient dusk-to-dawn light fixture. Connecting with this business might be helpful. I also spoke with the Dept. of Planning. Very interested in what this program could mean in the community.*

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**Idea: Community-Based Organization Distribution of EE Kits**

**Proposed by: People for Community Recovery**

Utility Responses

- **Ameren IL:** This proposal has a focus on northern IL utilities but would like to explore concept in Ameren's service territory.
- **ComEd:** Already distributing a lot of kits through CAAs. Interested in what this would look like to work with CBOs, improve install rates and cost-effectiveness.
- **Nicor Gas:** Already distributing kits through CAAs; partnership with Ameren on Bloomington-normal area.
- **PG/NSG:** Looking to partner with CBOs to do the distribution. Not quite there yet but will reach out to Cheryl to discuss how this will move forward.

Q&A:

*[Cheryl Johnson] Thanks to everyone for reviewing. I want to emphasize the need for CBOs to be engaged – the community has relationship with CBOs. Look at the orgs established in the communities.*

*[Kristol Simms] We are working to develop a roadmap for CBOs to begin to offer assistance to communities to get them ready to go to implement programs.*

[Aimee Gendusa-English] Agree with Cheryl. CAAs are wonderful but not the only way to deliver to communities. What would be barriers to doing this with CBOs? What is the burden? Some utilities were working with food pantries previously.

[Kristol Simms] I don't see a big barrier. Kits are definitely an easy entry point. DI is a different story, but for them to host an event, provide education and outreach and distribute kits to start residents on the EE journey is effective. For example, Senior Services Plus has distributed thousands of kits for Ameren. They're going to be signing customers up for kits, virtual assessments and weatherization.

[Molly Lunn] We need to think through what the process would look like, recruiting CBOs, how much can we allocate to the program. Definitely interested in exploring further.

[Omy Garcia] Questions are really just logistical. Currently kits are being mailed. Not opposed to doing this.

[Mike King] Very interested in doing this.

[Jim Jerozal] CBO may not need physical kits. Nicor has a portal to order kits.

[Kristol Simms] That's what we're moving towards, to have limited-touch kit delivery.

[Laura Goldberg] These are proposals for the next program cycle, 2022. So hopefully the worry of limited touch is not necessary. There is already many CBOs already involved with IQ, so utilities can look at them for partnership.

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**Idea:** *Community EV Charging Pilot*

**Proposed by:** **Bronzeville Community Development Partnership**

Utility Responses

- **Ameren IL:** Further analysis needed to consider this as a pilot.
- **ComEd:** Initial feeling is this will be hard to do from perspective of the focus of EE statute. Could potentially look at whether we can do something with a change in the TRM. The idea for paying for the full cost of the chargers is beyond what they're able to do. ComEd is interested in developing the EV market. We have an EV team separate from EE; will coordinate to start this conversation.
- **Nicor Gas:** N/A
- **PG/NSG:** N/A

Q&A: No questions.

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**Idea:** *Door Sweeps & Coil Cleaning of HVAC System*

**Proposed by:** **Senior Services Plus**

Utility Responses

- **Ameren IL:** Door sweeps – just started offering this as a pilot this year. Considering including this in kits, since it's a long-life measure. This measure is included in the potential study, so depending on this study, will consider how to incorporate in the portfolio.
- **ComEd:** Already offer rebates on power strips and are part of DI programs. In terms of scale we have concerns because of evaluations on power strips like in-service rates, etc. Can't commit to the level at which this is proposed. Will determine what is feasible in portfolio.
- **Nicor Gas:** N/A
- **PG/NSG:** N/A

Q&A: No questions

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**Idea:** *IHWAP Braiding Approach*

**Proposed by:** **Community Action Partnership of Lake County**

Utility Responses

- **Ameren IL:** Need further discussions around this. Idea as pitched wasn't completely clear, specifically idea of percentages of funding called out here. Some more info that's going to have to be provided to them to consider.
- **ComEd:** Similar reaction. Want to understand what the underlying need is from the agency. Let the agency decide which measures get utility dollars and which get the

IHWAP dollars. Puts ComEd at a risk from a cost control perspective, considering we need input from DCEO and 16 CAAs. Giving them total ability to decide funding is problematic.

- **Nicor Gas:** Similar to other utilities. Need further discussion about this. Looking at cost-effectiveness of this is necessary.
- **PG/NSG:** More input and decisions needed from DCEO. They oversee procedures for this program. Have to bring them into the fold. The cost, what it would look like and how it would impact portfolio are all concerns

#### Q&A:

*[Marsha Belcher] This proposal does need more discussion because this proposal has nothing about CAAs complete control over measures. It's related to the 50/50 funding for every project, need for flexibility, maybe 70/30 in certain cases: it's not subtle enough when we're in such uncertain times. If you're thinking this is about control, then we definitely need more discussion.*

*[Molly Lunn] Agreed this needs to be talked through*

*[Karen Lusson] Does your proposal have anything to do with Agency's ability to spend down dollars at the end of the year, or?*

*[Marsha Belcher] Will follow-up with my weatherization department. Some measures lean more heavily toward utility program than state program. But it's 50/50 every time and this doesn't make sense. There is currently no flexibility for funding ratios.*

*[Jim Jerozal] Does that nuance of not being able to split 50/50 mean that you're incurring more cost? Is there money left on the table?*

*[Marsha Belcher] There are instances where our Agency could have completed more measures for either the state or utility program, but we couldn't due to the current structure.*

*[Aimee English] I'm sympathetic to CAAs and agree with providing more flexibility if possible. What's the issue with 50/50 cost split? Premise is leveraging the systems and infrastructure of CAAs. So why not allow them this flexibility?*

*[Jim Jerozal] There was an agreement between utilities and DCEO for the current EE Plan on the 50/50 split – we need them at the table for a future discussion. This was a long negotiation.*

*[Molly Lunn] Agree with Jim. 50/50 cost split was a long decision in the making. If we're splitting measure by measure, look at potential impacts of cost-effectiveness, savings out of program, especially if the change in percentages change what savings they receive.*

**Next step: A follow-up discussion on IHWAP is planned for later this summer (anticipated in August).**

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**Idea:** HVAC Funding for IHWAP

**Proposed by:** Crosswalk Community Action Agency

Utility Responses

- **Ameren IL:** We need to do more analysis and modelling to figure out balance between additional funding and the number of new customers served.
- **ComEd:** N/A
- **Nicor Gas:** N/A
- **PG/NSG:** N/A

Q&A: No questions.

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**Idea:** Health and Safety Repairs

**Proposed by:** Rebuilding Together Metro Chicago

Utility Responses

- **Ameren IL:** Health and safety has been identified as a hurdle to these programs before. Analysis may be needed on how this affects program funding and savings produced.
- **ComEd:** Interested in addressing H&S repairs. Through additional exploration, there could be more barriers or consideration for implementing this right away
- **Nicor Gas:** We have had a partnership with rebuilding together for 3-4 years now. Great partnership. They use some of their funds to do deeper retrofits while Nicor does the EE.
- **PG/NSG:** Would have to see what the program cost impacts will be. Need to dive deeper.

Q&A: No questions.

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**Idea:** Joint Recommendations on Weatherization Best Practices and Recommendations

**Proposed by:** NRDC, Citizens Utility Board, and National Consumer Law Center

Utility Responses

- **Ameren IL:** There are a lot of pieces to this. Bottom line, further discussion on what the submitters feel the optimal measure mix is. Utility has looked to reduce measure costs. Same thing with increasing capacity of CAAs – working to do this over the past few years. Look to have further discussion to continue on this path.
- **ComEd:** Interested in discussing further. We welcome additional conversation on any of these weatherization topics. Similar to previous IHWAP idea; a lot of these things will be dictated by discussion with DCEO. How to approach dollars from utilities, which to prioritize. Lot to unpack but certainly interested in parsing this out for the next plan.
- **Nicor Gas:** Agreed; need DCEO for further discussion.
- **PG/NSG:** Need a deeper dive on measure mix and other considerations but interested in discussing further.

Q&A:

*[Cate York] In regards to further conversations, is this a conversation between DCEO and utilities or open to larger stakeholder involvement and how would that play out?*

*[Chris Neme] Ultimately, this Fall, non-financially interested parties will negotiate a settlement on plans before regulatory process. Productive conversation can happen here. But some of these issues are cross cutting across multiple utilities. It might make sense to have a broader conversation before the single utility settlement negotiations. I'm wondering whether a conversation between non-financially interested stakeholders and all the utilities preceding subsequent conversations with individual utilities might make sense.*

*[Molly Lunn] There are many 'asks' here. Interested in understanding stakeholder priorities/key recommendations on weatherization.*

*[Kristol Simms] Some asks conflict with each other and maybe some of that can be resolved.*

*[Kristol Simms] We are hoping the rest of IQ South advisory committee meetings this year will be an opportunity to resolve some of these issues.*

**Next steps:**

- In July, utilities will meet with non-financially interested stakeholders to discuss refined weatherization recommendations.
- A follow-up discussion on IHWAP is planned for later this summer (anticipated in August).

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**Idea:** Bill Assistance Coordination Lift-up Model Pilot

**Proposed by:** People for Community Recovery

Utility Responses

- **Ameren IL:** This could be a Breakthrough Equipment and Devices opportunity; interested to see how this fits in TRM. Further discussion needed.
- **ComEd:** Some of these ideas, restricting bill debt and rate design, may fall outside EE but interested in exploring nonetheless.
- **Nicor Gas:** Working with internal departments – bill assistance, LIHEAP – to improve better communication.
- **PG/NSG:** This should be coded green; want to continue to think through.

Q&A: No questions

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**Idea:** Bill Affordability Coordination

**Proposed by:** People for Community Recovery, NRDC and National Consumer Law Center (separate EE idea submittals; joint presentation)

Utility Responses

- **Ameren:** Same answer as above.
- **ComEd:** --
- **Nicor:** --
- **PG/NSG:** Developing resource page online for customer sectors. Trying to address accessibility.

Q&A:

*[Karen Lusson] There is a lot of room for improvement on utility websites. Hard to navigate IQ info. A lot is happening at the ICC in terms of bill affordability. Settlement may have significant impacts on debt and bills. Critical that utility EE departments are aware and incorporated in messaging on programs. It would be great to have a rep from each utility on upcoming conversations related to settlement and formal notice on inquiry about affordability of utility service. Among topics are increasing funding for PIPP, improve statutory language so funds aren't swept, discount rates through arrearage management program. These are all conversations that the utility EE reps should participate in. What we hear from utility reps is concern for LI communities, and conveying this to the bills department is critical.*

*[Laura Goldberg] This is about getting a different subset of customers connected with longer term strategies for bill affordability. This would be a good way to directly ensure anything looked at to reduce energy burden and improve affordability can be quantified and looked at directly in the IQ programs.*

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**Idea:** IQ MF Enhancements and IQ Heat Pump Retrofits

**Proposed by:** NRDC

Utility Responses

- **Ameren IL:** We have made strides in a one-stop-shop approach for IQ sector. Put employers through workshops last year and continue to work towards this approach. Regarding heat pumps, Ameren is including this measure in the market potential study. Also wrapping up research using AMI data to identify MF buildings using electric resistance heating to consider implementation in the next portfolio
- **ComEd:** Open to suggestions and ideas to improve current offering and programs. We picked a few things out of this one; more modelling and analysis to see how this would impact portfolio. Regarding heat pumps, this is similar to a program their running in their R&D. Look forward to using study results to inform future conversations.
- **Nicor Gas:** We provide a comprehensive solution with the IHWAP program; we do provide these one-stop shop services with DCEO and ComEd. Interested in working with ComEd, joint delivery and connection with financing; Red because they don't see a financing as an issue. Coordinate with IHDA.
- **PG/NSG:** Similar to ComEd – always looking for ways to improve enhancements with budget implications. Open to discussing more and seeing how this fits into the overall portfolio. Also consider customer journey, because you're taking more time.

Q&A:

*[Cate York] Sounds like there's no separate IQ utility program?*

*[Mike King] Both, we are doing joint and also a Nicor-only offering. Open to working with ComEd on the Nicor-only approach. Going into the next cycle, we need to work with ComEd on this approach.*

*[Karen Lusson] This has been talked about for a long time – interested in Nicor Gas committing to working with ComEd.*

*[Laura Goldberg] Utilities are doing some things and not others. Confused why Ameren marked as red. This proposal had a specific budget. One stop shop approach coupled with a certain budget. One-stop shop is broad – some utilities are doing and others are not.*

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**Idea:** *Multifamily Ideas (consolidated): Whole Building Electrification Retrofits & Rural IQ Electric Pilot*

**Proposed by:** Elevate Energy

#### Utility Responses

- **Ameren IL:** Some measures, heat pump water heater and hp, called out within this idea is in the market potential study so more data will be able to inform this. Being dual fuel utility, they have to consider the customers interest and needs and that determines whether electrification is a good fit. Currently considering targeting rural IQ communities within service territory so they will continue to consider this.
- **ComEd:** Commit to evaluating these opportunities. A lot of nuance here. Will evaluate the value of the ideas proposed within the EE framework that exists.
- **Nicor Gas:** N/A
- **PG/NSG:** N/A

Q&A: No questions

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**Idea:** *Benchmarking Technical Potential*

**Proposed by:** Elevate Energy

#### Utility Responses

- **Ameren IL:** Further investigation is needed.
- **ComEd:** We did a pilot on this and after reviewing results, we don't see this as a compelling design to scale.
- **Nicor Gas:** Will evaluate this through emerging tech program.
- **PG/NSG:** Wouldn't be opposed but will need a deeper dive. Would have to follow up with more questions and understand expectation a bit more.

Q&A: No questions

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**Idea:** *Additional Gas Funding for Joint, Comprehensive Upgrade Program*

**Proposed by:** Community Investment Corp.

#### Utility Responses

- **Ameren IL:** N/A
- **ComEd:** N/A
- **Nicor Gas:** Will evaluate to see if there's funding for this.
- **PG/NSG:** N/A

Q&A:

*[Katherine Elmore] Some data and research on the market could help the utilities understand this more.*

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**Idea:** Consolidated idea responses - MF Building Owner Outreach and One-Stop Shop Marketing for All MF Programs

**Proposed by:** Community Investment Corp.

Utility Responses

- **Ameren IL:** Already engaging with building owners. We have been exploring one stop shop MF marketing.
- **ComEd:** Currently targeting building owners, open to suggestions to working with these different groups. One stop shop – as noted, always interested in ways to improve programs, currently have information sharing between market rate and IE/IQ and don't expect big changes here for next plan. Thinking about adopting strategies to simplify.
- **Nicor Gas:** Through realtor associations, building owner associations, BOMA, market transformation and income eligible (IE) program they're engaging building owners. Idea that they can consider and see if it makes sense in the designs for next cycle.
- **PG/NSG:** Supports MF building owner outreach and opportunity for commercial sector.

Q&A: No questions.

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**Idea:** Consolidated idea responses - Improving EE for Non-Owner Occupied Buildings and Combine Incentives and Financing

**Proposed by:** Community Investment Corp.

Utility Responses

- **Ameren IL:** We don't have an owner occupied req anymore; effort to offer on bill financing (OBF) for MF families; once that's in place, will follow same process as SF; incentives before financing through OBF
- **ComEd:** Interested in further analysis; MF OBF is close to being active and full intentions to connect mf with offering once available.
- **Nicor Gas:** Don't restrict eligibility; all they need is building owner signature; they have OBF starting up now and in MF IQ space, it's 100% paid for by the program, so don't feel there's a need to do OBF in this market.
- **PG/NSG:** Interested in exploring this further.

Q&A:

*[Katherine Elmore] Interested in getting more detail; of course, there's engagement but with what groups; what about the unsubsidized market. Issue of OBF and incentives looks to be in the process of being addressed.*

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**Idea:** Consolidated idea responses - Portfolio Applications; Enabling EE Programs for Vacant Distressed Units Above Code

**Proposed by:** Community Investment Corp.

#### Utility Responses

- **Ameren IL:** In summer; rolling out application that will reduce paperwork and streamline process. Target enterprise zones when rehabbing buildings and leveraging other funding sources. On IQ eligibility; the methodology is already called out in the policy manual
- **ComEd:** 1. Have other programs that offer a single application, so this will be top of mind and fitting in MF program design 2. These properties do apply in the AMF CN program, interested in understanding more gaps; there's a conversation at the start of this fall but they also follow policy manual guidelines.
- **Nicor Gas:** 1. On applications barrier, a single application process is being looked at, interested in any ways to improve this process. 2. Already doing this with AMF NC; 3. Included in the policy manual. Always willing to listen to new process improvement ideas.
- **PG/NSG:** 1. Regularly looking at customer journey. Feel there's been strides in the application process. 2. Something that we feel like if they need to go beyond what they're offering, concerns over budget and ability if it goes beyond MF new construction; same as other utility policy manual

#### Q&A:

*[Katherine Elmore] This idea was passed along as it originated from the implementer. More data collection is needed on properties that don't make it to the queue.*

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#### **Idea: Smart Thermostat Approach**

**Proposed by: National Consumer Law Center**

#### Utility Responses

- **Ameren IL:** Ameren IL already considers the applicability to that household. Really need more understanding of where this idea was borne and data to back up concerns. Not supportive of an idea that's limiting access to a measure based on perceived technical capabilities.
- **ComEd:** Installation processes and procedures cross programs to keep consideration top of mind.
- **Nicor Gas:** Same response as ComEd.
- **PG/NSG:** We are already considering smart t-stat enhancements for next plan

#### Q&A:

*[Karen Lusson] Happy to follow-up with utilities if clarification is needed.*

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#### **Idea: IQ Program Spending**

**Proposed by: National Consumer Law Center**

#### Utility Responses

- **Ameren IL:** Further suggestion needed for funding proposal. Need to consider how to balance portfolio to achieve savings levels

- **ComEd:** Looking to maximize IE spend as much as possible but the funding level described here will require consideration and modeling on impacts on savings goals and budget; impact to bring portfolio into balance for next plan
- **Nicor Gas:** Need to consider how to balance and more analysis needed.
- **PG/NSG:** Same comment as other utilities.

Q&A:

*[Karen Lusson] Looking forward to continuing conversations in negotiations.*

**Idea:** *Healthy Building Materials + IQ Retrofits*

**Proposed by:** NRDC

Utility Responses

- **Ameren IL:** --
- **ComEd:** --
- **Nicor Gas:** [Joint Response] Interested in a better understanding what this idea is about. Understand that two-part foam is a concern, but it's used limitedly in IQ programs and it can be used safely as well. Do we need to implement a healthy materials safety sheet? Interested in discussing what this recommendation is. DCEO has field guides and that's what's used. More info on where you want to go.
- **PG/NSG:** --

Q&A:

*[Laura Goldberg] Practical implication is to prohibit 2-part spray PUE foam just on the insulation side. IT exacerbates asthma. Don't want reporting to be burdensome. Not meant to be a whole new reporting process. NRDC has a modified proposal on reporting; will provide as follow-up.*

**Follow-up:** NRDC to share modified proposal on healthy building material reporting.

**Idea:** *IQ Health and EE*

**Proposed by:** NRDC

Utility Responses

- **Ameren:** Ameren sees health and safety as an important piece to address; don't want to prohibit people in the program so look forward to discussions down the road.
- **ComEd:** Interested in keeping eyes open to opportunities to leverage other dollars and collaboration with other utilities.
- **Nicor Gas:** Initiatives through health department and insurance. Would love to partner with other utilities on this as we move forward. UEG partnership and a way to make dollars go further.
- **PG/NSG:** We want to make sure that this is a big component of what we're offering happy to talk about how to go further.

Q&A:

*[Laura Goldberg] For those already doing healthy building work, a better understanding of what's already being done and ways to improve would be helpful.*

*[Jacob Stoll] We have presented on this topic within the IQ Committee a few times; pilot reports are also available.*

*[Pastor Vance] Concerned generally about utility responses 'kicking the can down the road.'*

*[Laura Goldberg] Interested in this being a space for further discussion and understanding; this format for responses presented challenges.*

*[Cate York] Interested in understanding what utilities are already doing; this was mentioned several times in the meetings this week.*

*[Kristol Simms] What you are hearing today is uncertainty in program selection itself, due to current EE portfolio planning.*

*[Celia Johnson] The purpose of the June 16-17 meetings was for utilities to present initial responses to ideas; final decisions are not available yet since EE portfolio plans are currently in development.*

Next step: SAG Facilitator will follow-up with EE idea submitters to understand whether there are any additional questions on utility responses.

**Summary of Follow-Up Items and Next Steps**

- ***Income Qualification Guidelines Policy***
  - Utilities and non-financially interested stakeholders will have a follow-up discussion on policy language.
- ***Initial Energy Efficiency Idea Responses from Utilities:***
  - Energy Efficiency Portfolio Plans are currently in development by utility teams. If there are specific questions about EE Idea proposals, utilities will follow-up directly with idea submitters.
  - IHWAP and Weatherization Recommendations –
    - In July, utilities will meet with non-financially interested stakeholders to discuss refined weatherization recommendations.
    - A follow-up discussion on IHWAP is planned for later this summer (anticipated in August).
  - NRDC Health Building Proposal: NRDC will share modified proposal on healthy building material reporting.
  - SAG Facilitator will follow-up with EE idea submitters to understand whether there are any additional questions on utility responses.