



MEMORANDUM

December 17, 2019

TO: IQ North Committee
FROM: Theo Okiro and Alberto Rincon, Facilitation Team
SUBJECT: Summary of Work on Marketing & Outreach, EE Education, and Underserved Populations

Low-income energy efficiency (EE) programs have traditionally focused on installing measures into households with the primary goal of energy and monetary savings. After initial meetings with community-based organizations (CBOs) in Illinois, it became evident that more needed to be done to overcome challenges facing the communities that these programs are intended to support. CBOs expressed the need for program administrators to build trust, improve accessibility, integrate cultural competency, and recognize various other social & economic issues in the design and delivery of EE programs.

In 2018 and 2019, the Income Qualified North Advisory Committee (IQ North Committee) received feedback via in-person Committee meetings, one-on-one meetings with CBOs, and informal discussions with Committee stakeholders. A key goal was to identify marketing & outreach and education strategies that would effectively reach and promote low-income EE programs to IQ communities – especially underserved populations. In response, the Committee solicited input from regional utilities, community leaders, and CBOs. To supplement, the facilitation team compiled best practice research on national low-income EE programs.

A summary of the Committee work is provided below. Further details including Committee feedback, responses to the recommendations by IQ North Utilities, and research notes are found in the appendix.

Committee Feedback & Recommendations

Designing programs that acknowledge IQ customer traits:

- Incorporate direct customer feedback into program design: Create a process that includes regular one-on-one and small group check-ins with underserved customers to ensure their needs are reflected in program design. Consider making customer profiles used to systematically design & deliver programs sensitive to tenancy status, health needs, geography, and financial status of various IQ sub-populations such as the long-term unemployed, returning citizens, minorities, rural, and other disadvantaged groups.
- Pool resources to deliver comprehensive & streamlined programs: High-need and cost-burdened customers tend to be the most underserved. Target these customers via joint administration programs that pool resources and limit redundant touchpoints to streamline program delivery for these customers. Consider a “wrap-around” approach that offers customers referrals to a broader set of helpful services.
- Be mindful of communication style and content: Utilize clear, simple, and accessible language that is mindful of cultural differences in language use, contains content salient to customer interests and lifestyles, and that empowers customers to take advantage of IQ offerings.

Strengthening community partnerships and delivering programs:

- Partner with influential, social service community networks: Strong community partnerships are key to learning customer needs and delivering programs that may otherwise fail to reach them. Many innovative CBOs already work with these customers including non-energy organizations (governments, hospitals, etc.) that must be leveraged to the extent possible. Build community trust that can be relied on.
- Support grassroots campaign efforts: Consider expanding on community partnership efforts to launch campaigns that raise awareness around low-income EE programs, EE jobs, and their connection to environmental justice and economic development – issues which IQ communities often care about.
- Share data to understand and mend gaps in program delivery: Develop a process to identify, refer and track high-need customers like targeting customers based on geographic nonparticipation rates. This data, along with all available IQ program information, should be shared with all stakeholders so they remain responsive to customers.

APPENDIX I: IQ North Committee Feedback Regarding Marketing & Outreach

The topic was discussed at the following in-person Committee meetings: April 3, 2018; May 22, 2018; July 30, 2018; December 11, 2018 and February 8, 2019. The Committee was asked to share community specific needs and to review utility marketing & outreach plans for IQ programs. Below are notes on the topics covered through the Committee process including general feedback, ideas, and uncovered challenges.

Grassroots Approach to Marketing: Meet IQ customers where they are, i.e., collaborate and build strong relationships with Community Based Organizations such as churches, neighborhood organizations and community groups. Strong relationships consist of financial support, responsive communication, and collaboration.

- It is important for marketing and outreach to be done by community groups and community leaders.

Trust-Building is Needed: Create Community Ambassadors that can build trust and share information about Energy Efficiency Programs to IQ communities. This will ensure that IQ customers understand the programs are being offered by utilities and not alternative suppliers/scams.

- Customers have been contacted by Alternative Retail Electric Suppliers (ARES) and may be skeptical of IQ EE programs. Trust-building is needed to legitimize IQ EE programs.

Co-branding and Brand Alignment: The utilities should co-brand and align their brand marketing. This will make it easier to bridge unfamiliarity and support a uniform message.

- The utilities should consider co-branding with local CBOs. Example: a yard sign linking the utility offering with the LIHEAP/PIPP program of a local community group.
- Align utility marketing strategies with the facilitation team's outreach work – this will help establish more CBO relationships.

Leverage CAA networks: Community Action Agencies (CAAs) are an important but underutilized asset in reaching IQ customers. Leverage their existing capacity and network.

Partner with Influential Networks: Integrate influential community networks and agencies such as municipalities, Alderman Offices, community colleges and hospitals during outreach efforts.

- For example, Alderman Offices coordinate block parties. There could be a connection made with IQ EE programs and block parties.

Tenants vs. Homeowners: Tenants may not be able to act on EE programs compared to homeowners. Accordingly, marketing strategies used to reach tenants must be different from strategies to homeowners.

- The needs of IQ tenants are different from the needs of IQ homeowners. Tenants are more restricted in changes they can make to their homes.
- For example, consider partnering with Property Managers or Landlords when trying to reach IQ customers.

Innovative Approach: It is important to leverage people's lifestyle when selecting marketing strategies

- For example, In Lake County, fishing is a popular pastime, leverage existing groups to market IQ programs. Utilities can partner with fishing tournaments to reach IQ customers in Lake County.

Non-utility Energy Assistance Initiatives: Connect with other energy equity initiatives.

- For example, Delta Institute's notification system and Robert Woods Foundation's Community Power Initiatives.

Resource Constraints: Consider the resource and capacity constraints of CBOs and community members prior to outreach.

- Provide additional financial support to CBOs/CAAs if they are engaged to promote utility EE efforts.
- Establish a framework for community partners to apply for financial compensation.

Identifying Geographic Gaps: Closely track IQ participation geographically to identify areas with lower program participation.

Traditional Media vs. New Media: Leverage technology and use smart-phone apps such as NextDoor or Facebook Local to reach groups.

- However, there is a population that is not digitally inclined. They will best be continually supported via bill inserts, radio and television ads.
- Use door to door "blitzes" to engage customers.

APPENDIX II: IQ North Committee Feedback Regarding EE Education

This topic was discussed at the following in-person Committee meetings: May 22, 2018; December 11, 2018; and July 11, 2019. The Committee was asked to answer questions regarding barriers related to customer education on IQ programs. Below are notes on the topics covered through the Committee process including general feedback, ideas, and uncovered challenges.

Energy Efficiency (EE) Knowledge Gap: Many IQ customers are unaware of what EE means.

- We need to develop alternative language for educating IQ communities on EE.
- Idea: Shift focus from explicitly mentioning EE to an issue that is a pressing need for IQ communities such as: energy savings, bill affordability, home comfort, health benefits of EE

Trust-Building is Needed: Trust is a huge barrier to educating IQ customers on EE.

- Idea: Hire EE Community ambassadors from the community to get the educate communities about the importance of EE and the available programs.

EE Educational Materials: Create a short fact sheet that lists all IQ energy savings programs in Illinois with high-level information on programs and organizations.

Grassroots Education: There needs to be more effort to build strategic campaigns to engage IQ communities about the intersection of energy, jobs, the environment and economic development/justice. This will help build engagement with EE by communities who are interested in jobs and more economic opportunity.

APPENDIX III: IQ North Committee Feedback on Strategies for Underserved Populations

The topic was discussed at the following in-person Committee meetings: February 8, 2018 and July 11, 2019. The Committee was asked to listen and respond to five CBO presentations on underserved populations: Chicago Bungalow Association (Latino/ESL community), People for Community Recovery (Multi-family and Public Housing Residents), Austin Coming Together (Cost-Burdened Households), Chicago Commons (Seniors), Community Action Partnership of Lake County (Non-Urban IQ customers). Below are notes on the topics covered through the Committee process including presentation notes, general feedback, ideas, and uncovered challenges.

Hispanic and ESL Communities: Language is an obvious barrier but one that can be easily addressed.

- Latino homeowners often rent out their basements and/or attics, which violates the Chicago Building Code, and they are concerned about this information being identified.
- Home comfort and reducing draftiness is an important message in the Latino Community.

Multi-Family and Public Housing Residents:

- “Energy Efficiency” is not a term people are familiar with. A large percentage of customers have educational barriers.
- Program eligibility requirements can be prohibitive and inflexible.
- There is a lack of understanding of specific community issues. For example: Altgeld Gardens is known as a “toxic doughnut”, it has historically been isolated and surrounded by toxic pollution from former factories.

Cost Burdened Households:

- These residents often must choose between paying their rent or other basic necessities such as utility bills.

Senior Citizens: Seniors contend with: Technology difficulties; Physical limitations (hearing, vision, mobility); Mental status changes; Lack of trust of things that are not familiar; Safety concerns; Medical issues / hospitalizations / short term care facility placement.

- Seniors prioritize utility bill affordability. Chicago Commons run into situations where seniors won't turn on a fan or the A/C due to impacts on bills.
- Seniors can sometimes be too prideful to ask for help even if they are no longer tracking their utility bills. There needs to be a family member that can obtain access to that bill, even if they are not the account holder.

Non-Urban Populations: IQ customers living in rural areas are dispersed and live too far from intake sites. There may be areas that are 60-70 miles away from an event or intake center.

- CAP Lake County has learned that the key to reaching these families is finding times and events where they congregate.

APPENDIX IV: IQ North Committee Recommendations and Utility Responses to Date

The following chart contains a synthesized set of recommendations that resulted from the IQ North Committee feedback on Marketing & Outreach (M&O), EE Education (EEE) and Underserved Populations (USP). Responses by northern IL Utilities are provided based on presentations delivered on December 5, 2019.

Recommendations	Utility Responses		
	ComEd	Nicor Gas	Peoples Gas / North Shore Gas
(1) Build strong relationships with trusted messengers (community leaders). Strive to partner with existing CAAs/CBOs including non-energy organizations that already work with underserved populations. Moreover, leverage these influential networks to scale efforts via local government offices, community colleges, hospitals, and others.	Plans to further identify and expand its Ambassador Network to position itself as a Trusted Partner with customers.	Will be working to expand partnerships with community based organizations.	As part of the IHWAP program, PGL/NSG works closely with CAAs and a multitude of community networks and local agencies that help support community needs, and provide educational opportunities and resources related to EE
(2) Be mindful of knowledge gaps and language use when framing EE opportunities: utilize clear, accessible, and empowering language that's mindful of cultural differences and encourages participation in programs. Include salient language such as "lower bills", "save money", "improved health", etc.	Will be working to connect messages of high bills, health and safety into program efforts.	Are already using alternative, salient language in marketing materials to account for cultural differences and appeal to customer interests.	Incorporating this into 2020 marketing plans and will review program language to highlight this recommendation.
(3) Seek to create positive Customer Service experiences for IQ customers by hiring customer service reps who are from the community or understand it well, or by implementing cultural competency trainings for customer service reps.		Will be addressing as a future endeavor.	Already utilize a highly diversified work force and call centers are continuously trained on cultural and language sensitivities. Open to discussing further.
(4) Construct a home for IQ Program information via document or webspace that summarizes EE programs and provides FAQs for customers: - Create fact sheet that lists all energy-related savings opportunities for customers. - Build a dedicated, user-friendly website with answers about EE, assistance programs, etc.	Will be constructing a one-stop shop on IQ programs.	Will be addressing as a future endeavor.	Planning to review the program website to provide more information on IQ offerings. Also, current approach is to target customers with programs that would provide them the best savings (not all programs applicable to customers)
(5) Organize strategic, targeted campaigns that educate communities on how EE creates jobs, housing stability, and supports environmental justice & economic development.	Has plans for grassroots engagement.	Plans to work with IQ Communities to drive campaigns that inform customers on EE opportunities.	Reviewing its outreach activities and will take this into consideration. May be best implemented by a joint effort.
(6) Consider co-branding IQ program materials or related events with CAAs and CBOs. Make sure to acknowledge the resource and capacity constraints of these CBO/CAA partners and consider subsidizing joint-efforts to build capacity & improve outreach.	Will be exploring different opportunities to collaborate with community partners and leverage their capacity to promote.	Already consider CBO resource constraints but will be looking at co-branding as a future endeavor based on requests from CBOs.	Already co-branding with partners and sponsoring CBOs across numerous efforts such as process application, outreach incentives and community engagement.
(7) Leverage knowledge on customer tenancy (rent vs. own), hobbies, past-times, and common lifestyle factors of community members (e.g., fishing tournaments; block parties) when selecting marketing and educational strategies. For example: engage landlords and property managers as a prerequisite to supporting IQ renters."		Deferring action on addressing tenancy differences due to difficulties with owners but will be speaking more with customers to tailor approaches to other characteristics.	Ongoing effort to find more avenues targeting underserved groups or individuals in a mindful and tailored approach. Working with trusted partners to do outreach at workshops, festivals, block parties, etc.
(8) Leverage existing data sources, including data on previous applicants to programs, to better understand where underserved populations are participating at lower rates and how we might better reach them.	Have been looking at data on customer geography and have adjusted resource allocation accordingly.	Are already looking at geographic data on program participation rates.	Have begun reviewing location-based analysis of program participation. This has been used to understand participation in areas and shift focus to underserved areas.
(9) Utilize both traditional media and new media (social media and smart phone apps) to reach IQ communities.	ComEd Save and Share App pilot in Bronzeville.	Deferring action on this for the time being.	Uses traditional and digital marketing channels (organic/paid) such as TV, social media (Facebook, Twitter, LinkedIn), radio, email, and direct mail.
(10) Consider adopting a "wraparound service" approach which acknowledges that customers may need utility-related help that is not EE specific; instead, work to refer customers to the appropriate service as needed.		Have this listed as an existing implementation.	Has requested additional background on this recommendation in order to provide a response.
(11) Speak directly with communities about their specific needs before tailoring an outreach approach based on assumptions about those communities. Consider increasing both one-on-one outreach and small-group outreach.	Will be learning directly from customers through surveys, phone calls, and other authentic connections in 2020.	Have started tailoring educational materials accordingly, but will be looking at opportunities to speak with communities more directly in the future.	Already focus on in-person interactions that educate and encourage trust between the customer and utilities, and help customers address concerns and questions is the first step to mending that trust factor.
(12) Train CBO/CAA partners on all available opportunities for addressing IQ customer energy burdens. These providers can then continue advising/assisting customers even if program efforts have moved to a different community.	Will be exploring different opportunities to collaborate with community partners and leverage their capacity to promote.	Will be working on this as a future endeavor.	Will provide CBOs with training and needed resources to build on transparency and trust within communities.

APPENDIX V: Best Practice Research on Low-Income EE Programs

The facilitation team performed this best practice research on nationwide low-income EE programs in preparation for the 2020 program cycle. The findings are meant to supplement the work of the IQ Advisory Committees and help position Illinois as a national leader in low-income EE program delivery.

Research methodology focused on a literature review that included: IL SAG evaluation reports, IL IQ research reports, ACEE and CEE research reports, APPRISE evaluation reports, and MEEA factsheets.

- 1) Coordinate between all pertinent stakeholder groups to deliver an efficient and streamlined service that limits touchpoints and maximizes impact:
 - Work towards having a single touchpoint for customers through joint offerings
Customers will be best served by a single touchpoint if they have separate gas and electric utilities, which reduces barriers to participation, offers a streamlined experience and includes a variety of options for energy savings.¹ Such a “one-stop-shop” program design is evident in some of the most effective low-income programs nationwide.² The overall goal is to work towards having a single point of contact for customers and for contractors; successful program implementers stress that simplifying program design and administration is critical to success and that working with a single contractor, which simplifies communication and ensures a strong relationship between contractor and utility, has also proven effective.²
 - Standardize messaging and offerings to the extent possible
Coordination between organizations serving low-income households, either on a state or regional basis, has been shown to facilitate more streamlined and effective delivery of various services. For example: the Massachusetts Low-Income Energy Affordability Network (LEAN) works to standardize eligibility requirements, procedures, and standards to enable delivery of various programs through CAP agencies throughout the state.³
 - Maximize funding by coordinating with WAP and EAP
To the extent possible, it is important that low-income programs coordinate service delivery with WAP and EAP (Energy Assistance Program) to maximize the impact of funding available.⁴
 - Remove repetitive steps in program application process
Review required documentation to reduce duplicative or unnecessarily repetitive requests. Navigant recommends a participant journey mapping analysis to help identify areas of improvement in the program participation process.⁵
 - Streamline payment process for affordable housing projects
When dealing with Affordable Housing New Construction, work with developers to streamline the payment process; ensure that expectations on the timing of fund allocation are transparent.⁶

- 2) Use targeting to align outreach efforts to programmatic goals:
 - Target high-usage customers first
Utilities should target customers with high usage first. By targeting resources at customers with the highest energy use, programs can maximize savings and ensure that resources are being directed at customers with high potential for energy savings. This strategy also supports customers with the greatest financial energy burden.¹
 - Create a portfolio approach that targets different customer segments
Leverage market segmentation and targeted program offerings: Several of the most successful utilities and program implementers studied offer a portfolio of low-income energy efficiency programs that focus on different types of customers, including high energy users, elderly customers, renters, [vulnerable populations], and owners of multifamily buildings.⁷

APPENDIX V: Best Practice Research on Low-Income Programs, Cont.

- Remember that a high percentage of burdened customers reside in single-family homes
Given the high percentage of economically challenged customers that own single family residences, utilities should [ensure it effectively targets] those customers for economically challenged programs.¹
 - Leverage bill assistance programs to find high-need customers
In some states bill payment assistance and energy efficiency programs coordinate and share customer information to help address the energy needs of the highest-use households. In New Jersey and Wisconsin the highest-use households in the affordability program are required to have energy efficiency upgrades (APPRISE 2007). In California the highest users in the California Alternate Rates for Energy (CARE) bill payment assistance program are identified through analysis, notified of their high usage, and provided with resources on program opportunities to improve energy efficiency (Edel and Abeyta 2015; PG&E 2014).³
- 3) To the extent possible, share data with implementors and keep communication open to ensure outreach efforts are aligned, data-driven, and cost-effective:
- Provide CBOs data on all available IQ programs
Utilities need to ensure that local organizations receive information on economically challenged energy efficiency programs and understand how to communicate offerings to eligible customers.⁸
 - Find secure way to share up-to-date program data with implementors
Utilities have important data on energy usage, low-income program participation, and bill payment problems that can be used in targeting LIEE. These data may not be available or up to date when programs are delivered by non-utility entities. However, well-designed systems and procedures [should find secure ways to provide] external access to utility data.⁷
 - Use data on marketing program cost & benefit to alter strategy
Assess the efficacy of different outreach & marketing approaches by considering their costs and benefits (savings, non-energy impacts, etc.) and using that to inform strategy.
- 4) Leverage existing relationships with community partners to inform educational approaches and to find ways to directly engage with customers that can benefit from participating:
- Provide education to customers throughout the life of program participation
A comprehensive education initiative should be developed in coordination with local community organizations. Utilities should continue to educate customers throughout the process of participating in a program – this ranges from understanding the financial benefits of various energy efficiency upgrades to identifying additional benefits that are important to customers. Additional benefits include increased home value, increased comfort, and environmental considerations.¹
 - Include customer workshops with prizes in education efforts
A Consumers Energy program in Michigan called Building Blocks featured direct interaction with program representatives during energy education workshops and follow-up coaching to encourage customers to install measures in their own homes. In this initiative customers were directly rewarded with incentives (cash and prize drawings) for engaging in the program. Post-program evaluations indicated that almost all customers (near 100% for most measures) followed through with do-it-yourself installations of the products they were trained on, including CFLs, LED night lights, outdoor light motion sensors, aerators, pipe wrap, and showerheads (Johnson et al. 2014).³

APPENDIX V: Best Practice Research on Low-Income Programs, Cont.

- 5) Give low-income customers a clear idea of how the program works, how it would directly benefit them, what the expectations of participation are, and what other programs may be available to them:
 - Tell customers the type of equipment that are program-eligible
Be very clear up-front about which equipment (types, models, etc.) are eligible for savings programs.⁹
 - Give customers education materials during measure installation
Provide consistent and proactive EE education via materials that are delivered at time of measure installation. Also, consider holding periodic meetings with PH residents to educate them on savings & upgrades.³
 - Include education materials on all available savings programs
Utilities that include multiple initiatives in their program portfolios... can incorporate energy-saving tips, education about direct install measures, and guidance on opportunities for deeper savings through utility programs.³
 - Sit down with customers during audits to craft a custom savings plan
During [an energy audit] visit, the auditor should work with the participant to identify potential energy-saving opportunities and assess which are feasible and the participant is willing to undertake. The output from the education should be a usage-reduction goal for the participant and an action plan. The action plan provides motivation and direction for customers to reduce energy usage.⁷

- 6) Provide explicit and relatable examples of how customers can save money and energy by participating in programs:
 - Give customers illustrative examples on how they would save
Self-efficacy refers to the degree to which individuals perceive a given behavior change to be possible for them and the perceived effectiveness of the behavior in achieving the desired goal (Bandura 1989). Behavior change of any kind is unlikely to happen without self-efficacy, because people have to perceive that change is possible before they will be willing to try to change. As a result, participation in energy efficiency programs may benefit from illustrating as explicitly as possible how an individual's small changes are both doable and will result in energy and monetary savings.¹⁰

- 7) Consider being clear upfront about the potential financial losses that are being left on the table for customers that do not participate in the program:
 - Consider framing customer non-participation as money lost rather than savings gained
Loss aversion refers to people's tendency to try to avoid losses, even if doing so means they potentially forego much larger gains. Most people value a potential loss two or more times greater than a potential gain (Thaler and Sunstein 2008). Consequently, energy efficiency audits may be more effective if the recommendations are framed in terms of avoided energy and monetary losses rather than future savings (Yates 1982).¹⁰

- 8) Education should generally focus on the following purposes:
 - Using Installed Measures:
The participant may need education on how to effectively use the installed measures.⁷
 - Energy-Saving Behaviors:
The participant can learn how to [adjust] energy usage behavior that can result in energy savings.⁷

APPENDIX V: Best Practice Research on Low-Income Programs, Cont.

- Understanding Energy Bills:
An understanding of energy bills allows the participant to make decisions about energy usage based on the costs of those uses. If the participant understands how to read the energy bill and determine when usage is decreasing, it provides positive re-enforcement for energy-saving actions.⁷
 - Availability of Wrap-around Services:
Informing customers of the entire “continuum” of services provided by utility affordability and energy efficiency customers helps them better understand the benefits and which programs are most helpful to them given their specific situation. (See Citizen’s Utility Board’s Service Provider Workshops).¹¹
- 9) Use known geographic, social, and economic characteristics of underserved customers to reach more of them in a shorter amount of time and at lesser cost:
- Target customers by neighborhood in a standardized manner
Eligible customers [were] targeted by neighborhood for participation in the [Duke] Neighborhood Energy Saver Program. This [allowed] the utility to focus on a specific area within the community. Illinois utilities should consider a similar [structured] approach as it has proven to be an effective strategy to reach many customers in a short timeframe and may reduce costs to the program.¹
 - Tailor approach based on specific customer income levels
When designing economically challenged energy efficiency programs in Illinois, it is important for utilities to consider the different attributes of extremely low income, low income and low-moderate income customers. Programs should be tailored to benefit each type of customer.¹ Error! Bookmark not defined.
 - Emphasize health & economic impacts for the underserved
When an important goal of the program is non-energy benefits, there can be other household characteristics that are considered in targeting [such as health or economic impacts].⁵
- 10) Be proactive about gathering input from target communities to design programs that better meet their needs and improve service delivery efficiency:
- Proactively incorporate feedback from the community
Actively and regularly solicit input from leaders and communities on how best to serve them; incorporate feedback and tailor programs so that programs both achieve required savings goals but also meet the wants and needs of the communities.¹
 - Prioritize high-usage households to realize greater savings
Tailoring energy efficiency interventions to individual household use characteristics can help households realize the highest savings.⁶
 - Save money & reduce customer pains by developing a “joint administration” approach
Program administrators can address multiple energy savings opportunities during one visit, helping to amortize the cost of outreach over a wide base of savings and reducing the need for further outreach costs later.⁶ Programs can also successfully address energy issues in low-income homes when various [utility] end uses can be addressed [including water], and when measures can be installed regardless of fuel type. For instance, a joint-utility approach can be used to streamline programs, lower administrative costs, and reduce number of visits to individual customers.³
 - Work with non-energy CBOs
Programs can leverage the interactions and existing relationships that non-energy-related organizations have with low-income households to reach more customers. Programs that successfully reach a broader range of low-income households have been developing ways to provide energy efficiency measures through channels

APPENDIX V: Best Practice Research on Low-Income Programs, Cont.

that households already use.^{3,11} Utilities should engage with local organizations that have relationships with and interact with economically challenged customers on a regular basis.¹²

11) Build trusting relationships with community partners and program implementers to assure that program requirements are being upheld, quality control remains possible, and ongoing training can be implemented to help improve programmatic outcomes:

- Prioritize working with senior or long-term community staff
Ensure that communication with staff from community partners involves staff that is most likely to remain permanently and consistently available throughout the program.³
- Ensure partnership agreements clearly communicate program requirements
If [they do] not do so already, [partnership agreements] should include a summary bulleted list of requirements for participating [community partners]. This list should be reviewed with senior-most [staff], asking them to describe their plan for meeting each requirement.³
- Emphasize quality control and training
Many of the program implementers studied noted that ongoing training for contractors and quality control professionals is critical and said they devote project funding specifically to regular trainings. Several program administrators also have strict quality control requirements for all projects rather than a sample.²

12) Have a plan to address key barriers that limit the ability to implement energy efficiency programs for low income individuals:

- Establish a plan for health & safety impediments to program participation
Utilities should have an established plan to address health and safety issues that arise during participation in energy efficiency programs. For example, a roof leak issue may be uncovered during weatherization upgrades. Utilities should coordinate with each other and with the IL EE SAG IQ advisory committee to ensure these issues are [planned for]. Utilities should also coordinate with local community organizations that may be able to help identify additional funds for repairs related to health and safety.¹ Where possible, spending should be undertaken to overcome health and safety barriers to allow for comprehensive service delivery. Depending on program regulations, this may be done by conducting an assessment of the maximum level of health and safety spending that will still allow for cost-effective service delivery or by locating other sources of funding that can cover these repair costs.⁷
- Consider using census data for multi-family qualification
It is difficult to qualify tenants in multi-family units, therefore using census tract data is a preferred method to determine eligibility.¹
- Provide comprehensive technical assistance to affordable housing projects
The most important feature of affordable multifamily programs is providing [comprehensive] assistance throughout the retrofit process. This includes analyzing and recommending equipment and system improvements, supporting the contracting and implementation of measures, and helping owners obtain and assemble the financial packages needed to pay for projects. The need for [comprehensive] assistance is generally higher in the affordable multifamily market as property owners commonly have fewer resources and less time available to devote to energy efficiency retrofits.⁴

APPENDIX VI: Endnotes from Best Practice Research

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