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2026 Oak Park Energy Navigator Implementation Proposal

February 2, 2026

Executive Summary

Elevate Energy (Elevate) is excited to present this proposal for 2026 implementation of the Oak Park Energy Navigator (OPEN) program. Elevate is a national nonprofit, based in Chicago, with extensive experience leading energy efficiency and electrification initiatives across Chicagoland and the Midwest.

The full launch of OPEN, Oak Park's energy efficiency and electrification one stop shop, will build on the success of the research, program design, and soft launch phases completed by Elevate over the last six months.

Elevate will implement the scope of services described below for a not-to-exceed budget of \$500,000 over a 12-month period. Deliverables will include Home Energy Assessments, Home Energy Roadmaps, and Energy Navigator services that connect participants to contractors and programs to help them implement home energy upgrades. Services will also include deep community engagement and outreach, marketing materials aligned with the Village's branding and messaging goals, and program administration such as Help Desk services, customer intake, data management, and reporting.

Progress to Date

Beginning in August 2025, Elevate conducted best practice research and collected initial implementation lessons along with stakeholder feedback to design an energy efficiency and electrification one stop shop on behalf of the Village of Oak Park. The resulting program model directly supports the community's climate mitigation goals outlined in the Climate Ready Oak Park (CROP) plan and offers services that reflect resident needs, priorities, and barriers to adopting clean, affordable energy solutions in their homes.

CROP identifies residential buildings as the source of approximately 70% of the Village's greenhouse gas emissions, alongside rising utility costs that exacerbate disparities in housing cost burden and exposure to indoor and outdoor pollutants. In response, the CROP plan calls for a coordinated, one-stop residential service model to support healthier, more energy efficient, and fully electric homes through integrated climate resilience interventions. OPEN is designed to meet these needs.

Elevate has completed the below deliverables to date, which position OPEN for successful implementation.

- **Summary of Best Practices in Program Design:** A research report synthesizing leading energy efficiency and electrification one-stop shop models to inform OPEN’s design and service delivery approach.
- **Stakeholder and Resident Feedback:** Engagement of renters, homeowners, rental property owners, and frontline community organizations through an in-person feedback session and one-to-one interviews to co-design a program responsive to resident needs.
- **Program Operations Guide:** Designed and refined a comprehensive program operations guide, incorporating lessons learned from the soft launch and best practices research. This includes processes and protocols for Energy Assessments, Help Desk, Energy Navigator services and data management, among others.
- **Core Operational and Program Materials:** Developed a suite of operational, educational, and promotional materials including an outreach flyer, participant application, assessment report template, Home Energy Roadmap template, Tenant Information Guide, and Contractor Selection Guide.
- **Community Engagement Strategy:** Designed a partnership-driven outreach model that leverages community-based organizations and neighborhood events to ensure equitable, culturally responsive access for renters and vulnerable residents.
- **Brand and Marketing Strategy:** Recommended a cohesive program identity and messaging framework to build trust, drive uptake, and ensure consistent, clear communication across all outreach channels. Drafted web content and marketing materials for both soft and full launch use.
- **Soft Launch Home Energy Assessments, Roadmaps, and Navigation Services:** Executed a soft launch of OPEN services, delivering 3 engagements to date, across diverse property types to pilot the proposed delivery model.

Proposed Program Delivery Model

Our proposed delivery model will provide tailored services to help Oak Park residents navigate the technical and financial complexities of home energy upgrades.

This model includes:

- **Home Energy Assessment:** A no-cost, comprehensive energy audit conducted by trained building science specialists. Assessments include visual inspection of the building envelope and mechanical systems, blower door testing, thermal imaging to identify air leaks and insulation gaps, and an evaluation for rooftop solar feasibility.
- **Home Energy Roadmap:** A customized, multi-phase energy efficiency and electrification plan that clearly outlines recommended upgrades, estimated costs, expected energy and bill savings, and greenhouse gas reductions. Roadmaps also identify available incentives and funding sources to make implementation more accessible.
- **Energy Navigator:** Ongoing one-on-one support from an in-house energy expert. Navigator conversations are tailored to household economic and technical needs, including support in accessing rebates, grants, and financing, as well as guidance on selecting qualified contractors.

Referrals will also flow both ways between this service and the Climate Coaches program offered by OPCAN, as well as other relevant Village offerings.

- **Help Desk:** A centralized point of contact via a dedicated phone line and email to assist residents with program inquiries, application completion, and multi-lingual support, while coordinating the intake process and scheduling for home energy assessments.
- **Partnership-Driven Community Engagement Strategy:** An outreach model grounded in trust, equity, and accessibility. By collaborating with community-based organizations (CBOs), the program embeds outreach within established local networks. This ensures residents receive information and support in familiar, culturally responsive settings, which is critical to reaching vulnerable communities that face barriers to participating in energy efficiency programs.
- **Brand and Messaging Strategy:** OPEN's brand and messaging strategy defines priority audiences, establishes branding recommendations to shape program awareness and trust, and articulates a clear messaging framework that communicates the program's unique value and benefits. The strategy is grounded in Village staff and audience feedback on resident motivations, barriers, and values and is implemented through coordinated marketing materials and community engagement activities.
- **Vulnerable Community Prioritization:** To support the Village of Oak Park's commitment to allocating no less than 40 percent of public resources to the most vulnerable and impacted community members, Elevate has identified the following priority populations to be targeted through this initiative, reducing the economic burden of housing and energy costs and strengthening household resilience:
 - Households earning $\leq 80\%$ AMI
 - Rent burdened households (rent costs $> 30\%$ monthly income)
 - Energy cost-burdened households (utility costs $> 6\%$ monthly income)
 - Household with members aged 65+
 - Households with members living with disabilities

2026 Proposed Scope of Services

Building on the research, partnerships, operational infrastructure, and soft launch delivery completed to date, the Elevate team is prepared to scale OPEN. Elevate will fully launch the refined service delivery model, activate community engagement and marketing strategies, and leverage the operational resources built over the past six months.

Specifically, Elevate proposes delivering the following scope of services over the next 12 months:

- **Energy Assessments & Navigator Services:** Serve up to 80 properties through a variety of offerings including Help Desk Support, Comprehensive Energy Assessments, and Energy Navigation services based on their need.
 - Participants will include a broad range of housing types including owner-occupied, rental properties, single family, and multifamily buildings up to 20 units. A minimum of 40% of participating households will represent vulnerable communities as defined above.

- A fully-staffed dedicated Help Desk will be available to support customers including phone line, email address, and bilingual services.
- **Marketing and Communications Suite:** Deliver a comprehensive suite of marketing and communications services including:
 - Web design and digital content
 - Branded promotional materials
 - Media and communications channel alignment
- **Community Engagement and Partnerships:** Implement a robust community engagement strategy including:
 - Presence at up to 20 neighborhood events in key community gathering spaces, such as the farmer’s markets, block clubs, and events facilitated by local community-based organizations
 - Host up to 8 workshops and clinics designed to increase program awareness and uptake—facilitated at local libraries, schools, and community centers
 - Four formalized partnerships with frontline community-based organizations, compensated through a stipend to support defined roles in outreach, program co-design, and implementation of ongoing community feedback loops.

Together, these services form a comprehensive and scalable approach to residential decarbonization in Oak Park. The following section outlines the proposed budget and timeline to deliver this scope effectively and ensure accountability throughout the 2026 program year.

Budget Assumptions

Elevate is prepared to deliver the full scope of services for a 12-month period beginning March, 2026 with a not-to-exceed budget of \$500,000. This work will be billed on a time and materials basis to accommodate variability in the range of customer types and needs.

This budget assumes up to 80 participants across three service tiers:

- 30 Intensive Participants: Vulnerable property owners receiving comprehensive assessments, energy roadmaps, and intensive navigator services with monthly check-ins. This also may include larger multifamily buildings that generally require more staff hours.
- 35 Standard Participants: Non-vulnerable property owners receiving assessments, energy roadmaps, and typical navigator services with quarterly check-ins.
- 15 Navigator-Only Participants: Property owners who have already received an assessment or have specific decarbonization goals and require help desk or case management support only.

On an all-in basis, the average expected cost per participant is approximately \$6,275. Because this is the first year of program implementation, a degree of variability is anticipated based on the specific mix of single family and multifamily properties, vulnerable community needs, and overall interest in the program. Labor hours can fluctuate significantly based on property type, as mid-size multifamily properties involve more complexity than single family homes. In alignment with the Community

Engagement Plan, this budget also includes the full suite of proposed outreach services and events, covering marketing support, marketing expenses, and stipends for community organization partners.

Component	Estimated Staff Hours	Cost
Energy Assessments & Energy Navigator Services	1,727	\$275,000
Community Engagement & Marketing	583	\$113,500
Administration, Reporting & Supervision	598	\$97,500
Expenses (Marketing, Events, Travel, & Assessment Software)	N/A	\$14,000
Total	2,908	\$500,000

Proposed Timeline

The transition from program planning and soft launch to full-scale operations is designed to ensure a seamless participant experience. Following Village approval of this proposal in February 2026, Elevate will move immediately into the full launch phase.

- **February 2026:** Soft Launch Conclusion and Feedback
 - Finalize the remaining soft launch Assessments, Home Energy Roadmaps, and Navigation services
 - Synthesize pilot data and resident feedback to make final refinements to the Program Operations Guide
 - Finalize and execute Memoranda of Understanding (MOUs) with community-based organization partners
- **March 2026:** Full Program Launch
 - Open the full application intake process to all eligible Oak Park residents (single family and multifamily)
 - Launch the dedicated program Help Desk for centralized phone and email support
 - Begin broad-scale marketing and outreach campaign using Brand and Message Strategy and Community Engagement Plan
- **April – June 2026:** Ramp Up Phase
 - Execute the first several community workshops and neighborhood-based events in coordination with local partners
 - Prioritize energy assessments for vulnerable property owners to allow maximum time for complex project navigation
 - Conduct contractor outreach to ensure the contractor directory is robust and ready for increased referral volume
- **July – December 2026:** Full Volume Implementation Support
 - Deliver ongoing navigation services, focusing on converting Home Energy Roadmaps into completed energy efficiency and electrification projects
 - Conduct mid-year performance review with Village staff to assess KPI progress and adjust outreach tactics if necessary

- **January – February 2027:** Annual Reporting and 2027 Planning
 - Continue navigation services for participants in the final stages of project implementation
 - Develop and present the Comprehensive Annual Impact Report, detailing energy savings, GHG reductions, and equity-focused reach.

Elevate welcomes the opportunity to continue and expand its partnership with the Village of Oak Park through the proposed 2026 scope of services and is committed to working collaboratively with Village staff and community stakeholders to advance Oak Park’s climate, energy, and equity objectives. The proposed scope of services, budget assumptions, and implementation timeline represent a strong and feasible inaugural year for the Oak Park Energy Navigator and establish a clear foundation for sustained program success. This first-year approach is designed to support measurable progress toward the Village’s municipal carbon reduction and greenhouse gas mitigation goals while creating the operational structure necessary for long-term program continuity and growth. Over time, this foundation will enable the Village to expand and deepen program services, while Elevate and the Village of Oak Park continue to collaborate on community-wide solutions to improving climate resilience in Oak Park.