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AMEREN ILLINOIS COMPANY 2025 ENERGY EFFICIENCY PORTFOLIO EVALUATION PLAN

PRESENTATION TO ILLINOIS STAKEHOLDER ADVISORY GROUP

DECEMBER 3, 2024

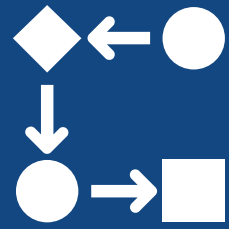


AGENDA

- Overview of 2025 evaluation approach
- 2025 evaluation activities planned by area
 - Program-specific evaluation activities
 - Portfolio-level evaluation activities
- Evaluation budget overview

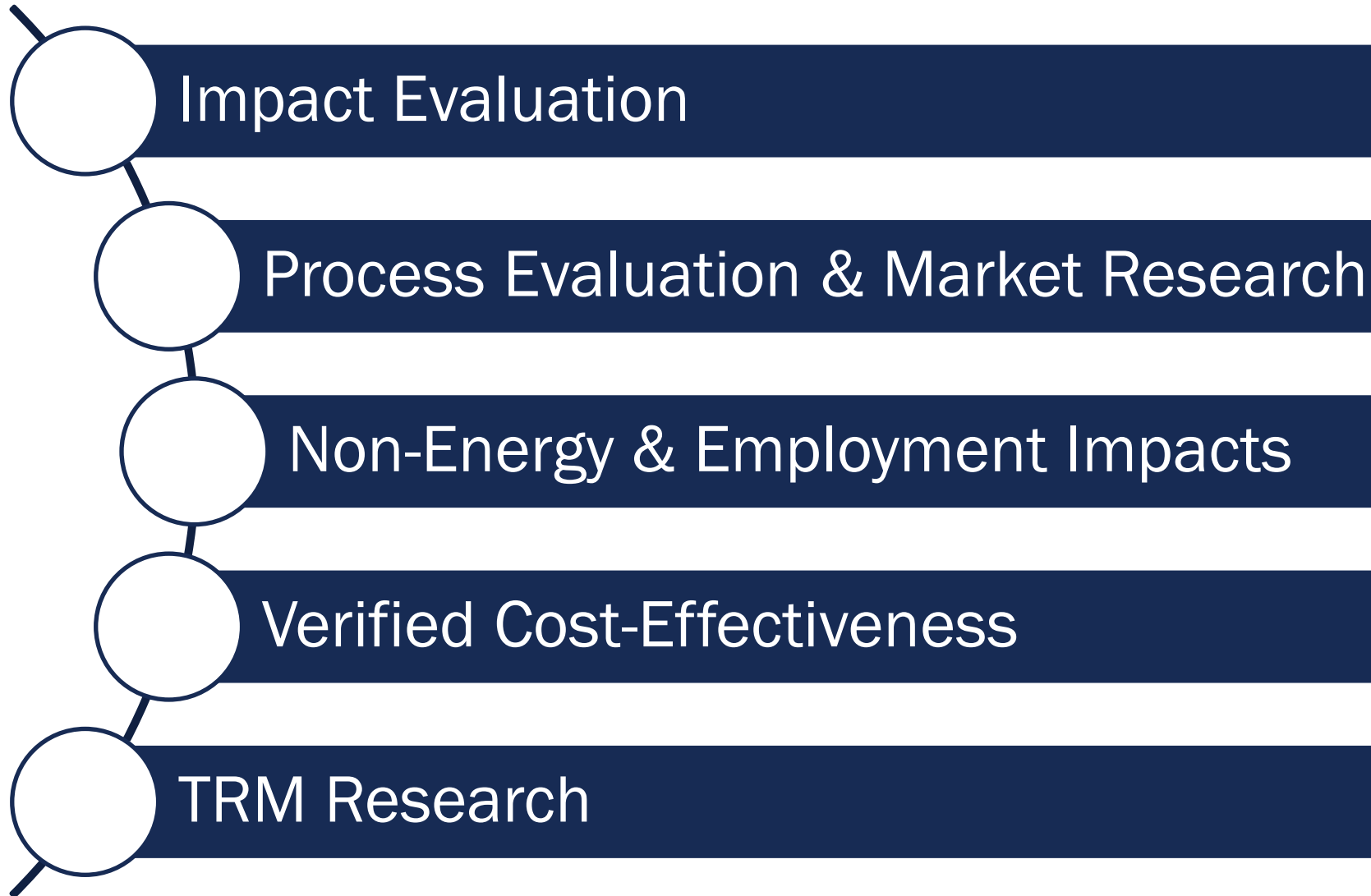


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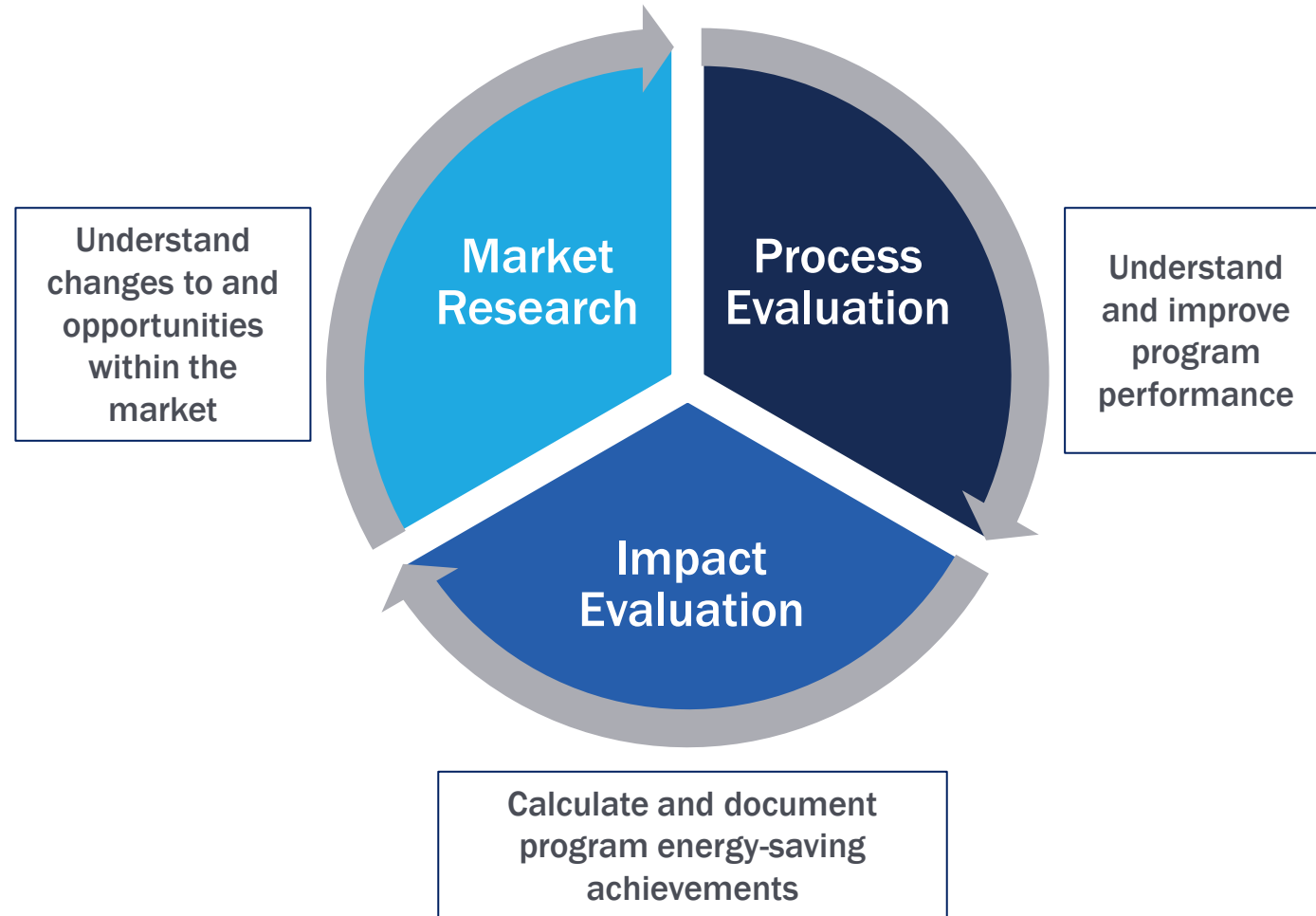
OVERVIEW OF 2025 EVALUATION APPROACH

KEY ANNUAL EVALUATION OBJECTIVES



OVERARCHING APPROACH & GUIDING PRINCIPLES

- Our budget is allocated between initiative-specific evaluation activities and other efforts
- We typically devote more evaluation resources and a higher degree of rigor to evaluation activities relating to initiatives with higher savings targets
- We drafted 2025 scopes at a high level as part of the multi-year planning process and have used that as a starting point, but have refined and refocused



NTG RESEARCH RESULTS EXPECTED IN 2025

- Residential Program
 - None
- Business Program
 - CHP NTG interviews – ongoing
 - SBDI TA SO follow-up – Q3
 - Midstream Food Service (statewide study) – Q2

EVALUATION COLLABORATION



- Ongoing collaboration occurs between the Illinois evaluation teams:
 - Monthly evaluation coordination meetings keep the teams connected and up to date
 - SAG meetings and Working Groups provide a framework for formal methodological collaboration
 - 2025 collaborative research planned
 - Compressed Air Leak Repair EUL Study
 - Statewide Midstream Food Service NTG Research



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PROGRAM-SPECIFIC EVALUATION ACTIVITIES

2022-2025 AMEREN ILLINOIS PORTFOLIO OVERVIEW

PROGRAM

Voltage Optimization Program	Residential Program	Business Program
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INITIATIVES

	<ul style="list-style-type: none"> ▪ Market Rate SF ▪ Market Rate MF ▪ Direct Distribution ▪ Retail Products ▪ Income Qualified ▪ Public Housing ▪ Electrification ▪ Market Transformation 	<ul style="list-style-type: none"> ▪ Standard ▪ Small Business ▪ Midstream ▪ Custom ▪ Retro-Commissioning ▪ Streetlighting ▪ Market Transformation
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- We organize our evaluation activities to most effectively use evaluation resources, minimize customer touchpoints, and provide research insights while considering the delivery strategy and unique characteristics of each AIC offering

ORGANIZATION OF EVALUATION PLAN

- Program evaluations split into five groups
- Also conduct cross-cutting research and compliance and stakeholder engagement activities

**Market Rate
& Kits**

**Income
Qualified &
Multifamily**

Business

**Pilots &
Emerging**

**Voltage
Optimization**

**Cross-Cutting
Research**

**Compliance &
Stakeholder
Engagement**



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MARKET RATE & KITS

MARKET RATE & KITS – 2025 EVALUATION HIGHLIGHTS

Initiative (Channel)	Staff Interviews	Materials & Data Review	Gross Impact Analysis	NTG Research
Retail Products (Downstream, Point of Purchase, Online)	✓	✓	✓	None
Market Rate Single Family (Midstream HVAC)	✓	✓	✓	None
Market Rate Single Family (Home Efficiency)	✓	✓	✓	None
Income Qualified (Community Kits)	✓	✓	✓	None
Direct Distribution (School Kits, High School Innovation)	✓	✓	✓	None



- Focus for 2025 is cross-cutting customer research to broadly support AIC’s delivery of heat pump incentives to market rate customers

HEAT PUMP INCENTIVE & PROGRAM DESIGN STUDY

Evaluation Context

- Increasing role of heat pumps for HVAC and water heating across multiple initiatives
- Prior research suggests high level of variability in how customers approach these purchase and installation decisions, and raises question of how to optimize incentive levels and implementation approach

Key Research Objectives

- Identify optimal heat pump incentives to maximize influence and minimize free-ridership
- Assess the potential impact of other design changes on customer adoption
- Understand heat pump purchase decisions, installation process, and fuel switching tendencies

Evaluation Approach

- Customer survey with residential customers
 - Choice-based conjoint to quantify willingness-to-pay and relative importance of other key considerations (prior equipment type, incentive format, heat pump knowledge, efficiency levels/energy costs, etc.)
 - Heat pump knowledge, interest, and experience (if any)
 - Customer decision-making and contractor influence
 - Implications of fuel switching



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INCOME QUALIFIED & MULTIFAMILY

INCOME QUALIFIED & MULTIFAMILY – 2025 EVALUATION HIGHLIGHTS

Initiative (Channel)	Staff Interviews	Materials & Data Review	Gross Impact Analysis	NTG Research
Single Family Whole Building (SF, CAA, Joint Utility)	✓	✓	✓	N/A
Smart Savers	✓	✓	✓	N/A
Mobile Homes	✓	✓	✓	N/A
Healthier Homes	✓	✓	✓	N/A
Accessibility Pilot	✓	✓	✓	N/A
Multifamily (MF, Public Housing, Market Rate)	✓	✓	✓	None

 Process research for Smart Savers, Healthier Homes, and Accessibility Pilot

 Research to assess interactions between IQ Initiative and AIC credit & collections department
 Research to support AIC IQ electrification efforts

IQ INITIATIVE – PROCESS RESEARCH

- Smart Savers
 - In addition to monitoring participant satisfaction with the channel over time, recent modifications to the channel's implementation necessitate updated participant survey research.
 - Channel optimization: transition from AIC mass marketing to a Program Ally-led marketing strategy, shift to a Program Ally-only installation model, and enhanced focus on participant education on how to use their advanced thermostats
- Healthier Homes and Accessibility Pilot
 - Understand the implementation strategy and early challenges and successes through interviews with delivery partners (HH and AP) and participant interviews (AP)
 - Identify opportunities for improvement, increase participation and overall satisfaction



IQ ELECTRIFICATION TARGETING & BARRIERS STUDY

Evaluation Context

- AIC has not seen the desired level of uptake in their electrification offerings
- They would like to better understand the impact that marketing and outreach efforts, and targeting are having on the level of program performance
 - Target customer = propane customers

Key Research Objectives

- Review current approach for identifying propane customers and identify any recommendations for improvement in targeting
- Understand barriers to electrification efforts to increase program participation and optimize marketing and outreach efforts

Research Activities

Staff Interviews

Non-Participant Research

Peer Utility Research

IQ CREDIT & COLLECTIONS STUDY

Evaluation Context – One-Time Study Report

- AIC aims to refer customers with bills sent to collections or those negotiating payment plans to its IQ energy efficiency offerings to mitigate arrearages and service shutoffs.
- From Reporting Metrics: *“This study will assess the level and consistency of cross referrals made by credit and collections departments to IQ EE programs, and what portion of customers receiving referrals subsequently participate in an IQ whole building program.”*

Key Research Objectives

- Identify how frequently and consistently the AIC credit and collections department refers customers to AIC’s IQ energy efficiency offerings.
- Understand what portion of customers who receive referrals go on to participate in an IQ whole-building offering.

Research Activities
Credit & Collection Department Staff Interviews
Tracking Data Review/Analysis
Customer Survey

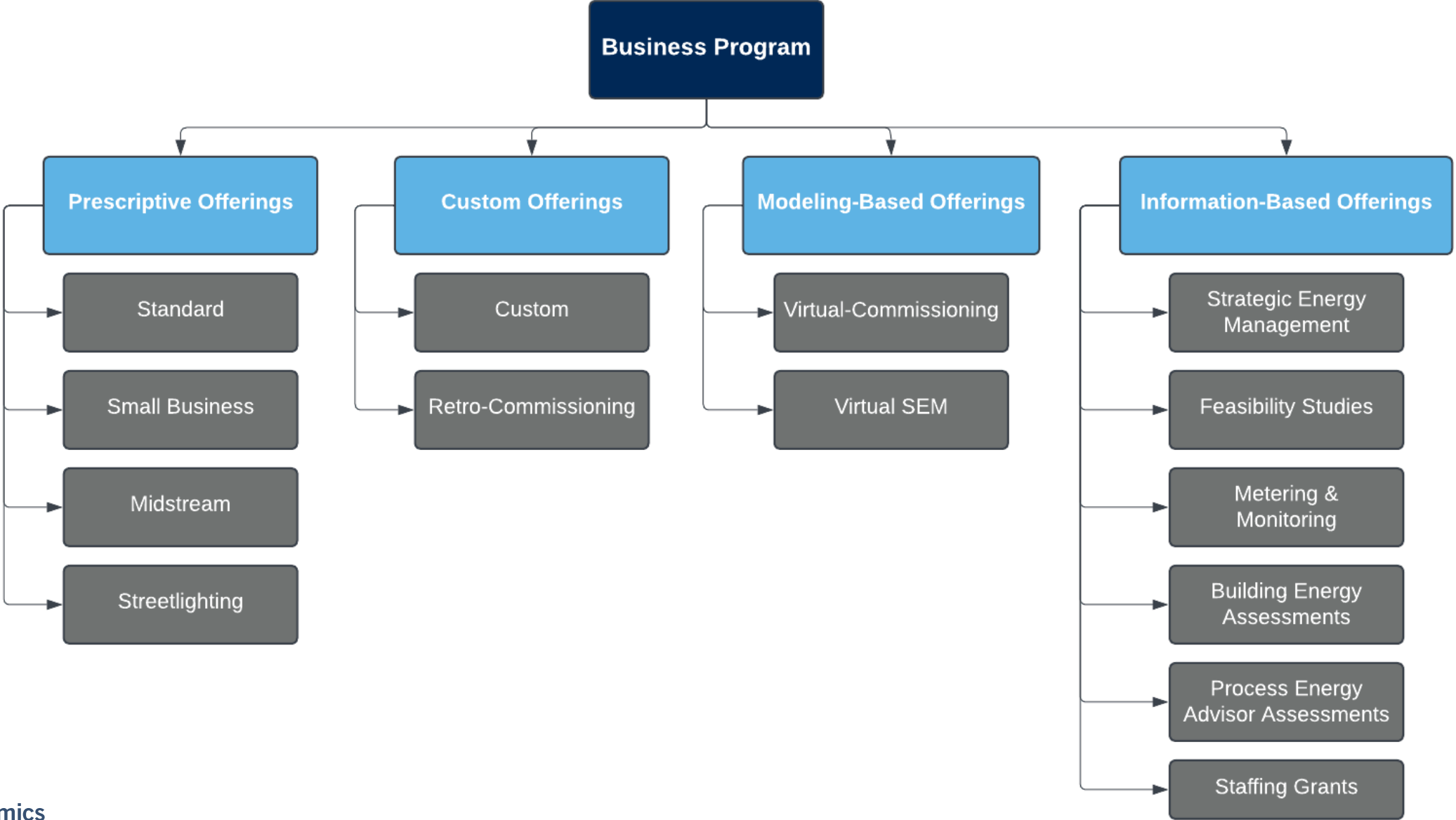


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BUSINESS

BUSINESS PROGRAM STRUCTURE



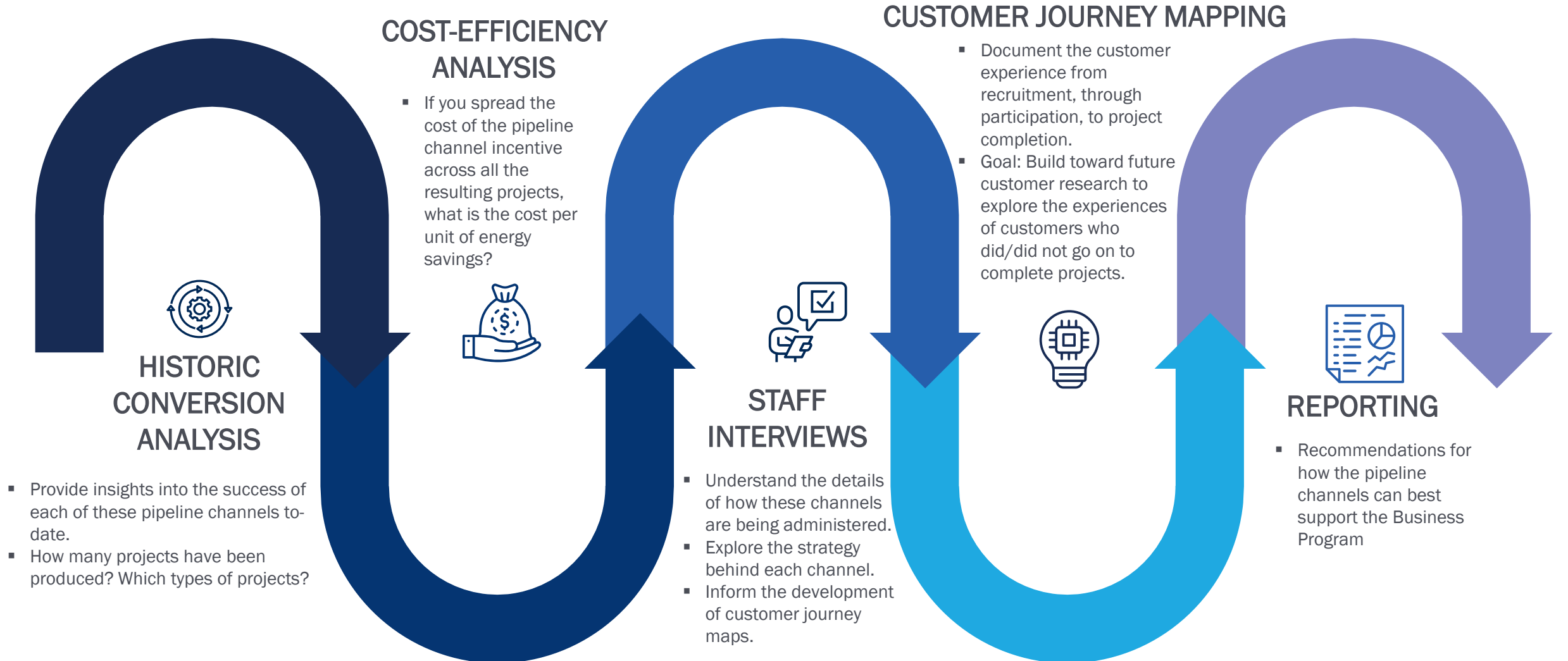
BUSINESS – 2025 EVALUATION HIGHLIGHTS

Initiative (Channel)	Staff Interviews	Materials & Data Review	Gross Impact Analysis	NTG Research
Standard (Core, Online Store, BOC)	✓	✓	✓	None
Custom	✓	✓	✓	✓
Small Business (SBDI, SBEP)	✓	✓	✓	✓
Midstream (Lighting, HVAC, Food Service)	✓	✓	✓	None
Retro-Commissioning (Core, VCx, VSEM)	✓	✓	✓	None
Streetlighting	✓	✓	✓	None



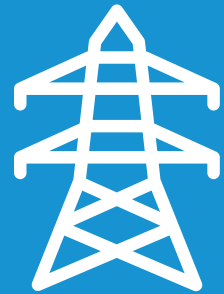
- Focus for 2025 is cross-cutting “pipeline channel” process evaluation to holistically support Business Program

“PIPELINE CHANNELS” PROCESS EVALUATION





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VOLTAGE OPTIMIZATION

VOLTAGE OPTIMIZATION – 2025 EVALUATION ACTIVITIES

Evaluation Context

- AIC is deploying several hundred VO circuits in 2024, which will start operating on January 1, 2025
- VO represents a large share of AIC’s planned portfolio electric energy savings in 2025

Key Research Objectives

- Estimate energy and demand impacts from these circuits based on the IL-TRM V13.0 approach
- Confirm ongoing operation of VO deployed in previous years

Evaluation Approach

- Review of pre-period and post-period AMI data
- Verification that VO circuits deployed in previous years are still operational
- IL-TRM based impact evaluation approach with multiple interim impact evaluations

Research Activities
Data Requests, Material Reviews, Staff Interviews
Verification of VO Deployment to Date
IL-TRM V13.0 Application



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PILOTS AND EMERGING AREAS

LUMINAIRE-LEVEL LIGHTING CONTROLS MARKET TRANSFORMATION INITIATIVE

- Three-year evaluation cycle aligned with LLLC Business Plan
- “Rolling” evaluation efforts, coordinated between Opinion Dynamics, AIC, and implementation teams

Activity	2024	2025	2026
Pilot Materials Review	✓	✓	✓
Pre- & Post-Training Assessments with Trade Allies	✓	✓	✓
Market Actor Surveys (Market-Level Measurement)	✓	✓	✓
Market Progress Indicator (MPI) Assessments	✓	✓	✓
Monitor Lighting Market	✓	✓	✓
Networked Lighting Control (NLC) & LLLC Sales Data Analysis	✓	✓	✓
Mid-Year Data Analytics	✓	✓	✓
Estimation of Market Transformation Savings	✓	✓	✓
Revisit Natural Market Baseline & Assumptions			✓



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PORTFOLIO-LEVEL EVALUATION ACTIVITIES



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CROSS-CUTTING RESEARCH

CROSS-CUTTING RESEARCH SUMMARY

Compressed Air
Leak Repair EUL
Study

Supplier Process
Research

Partial
Displacement
Heat Pump
Metering Study

PARTIAL DISPLACEMENT HEAT PUMP METERING STUDY

Research Question: What is the observed *in situ* switchover temperature between heating sources for air source heat pumps with backup fossil/electric resistance heat?



Research Outputs: Information to update IL-TRM measure characterization for partial displacement heat pump installations to refine savings estimates.

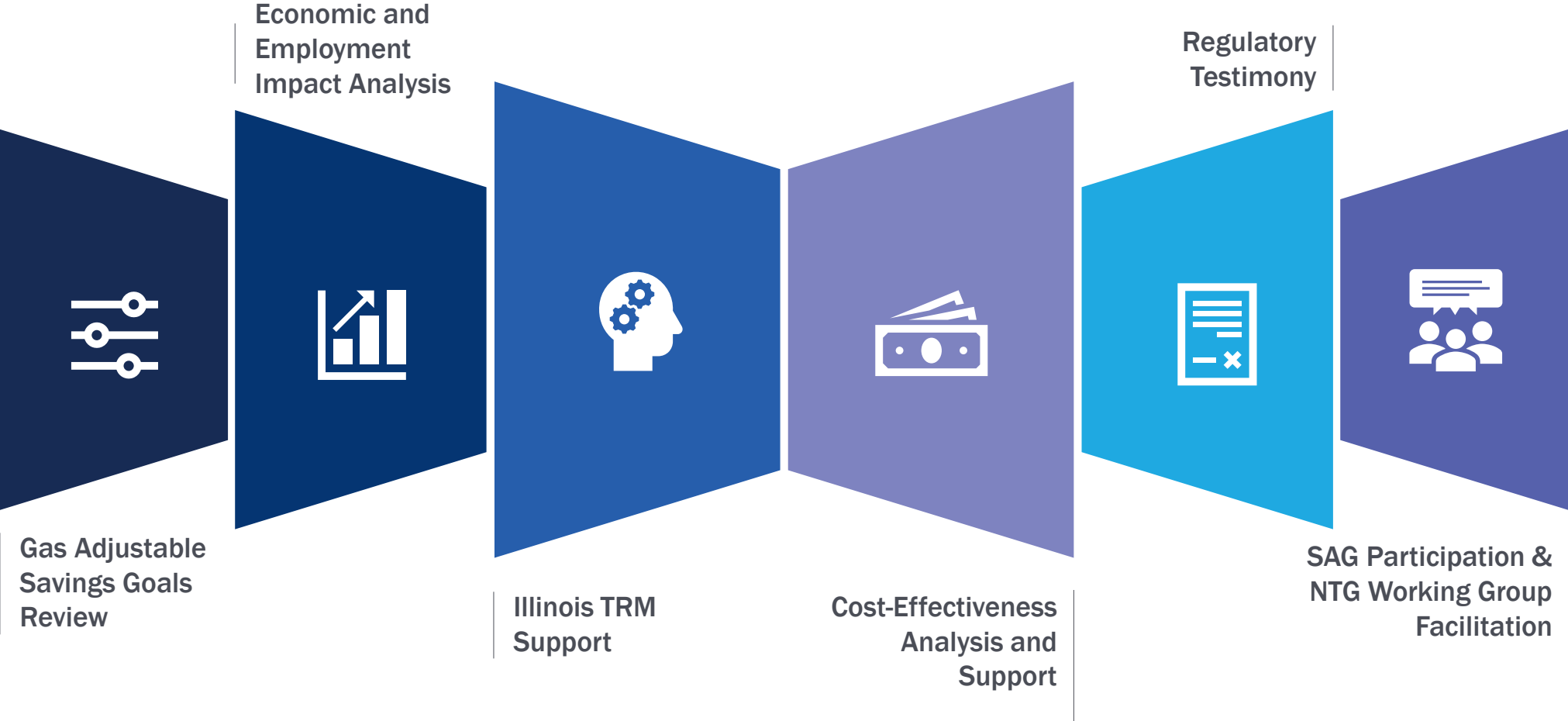


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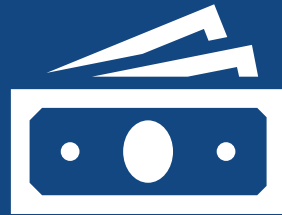
COMPLIANCE AND STAKEHOLDER ENGAGEMENT

COMPLIANCE ACTIVITIES





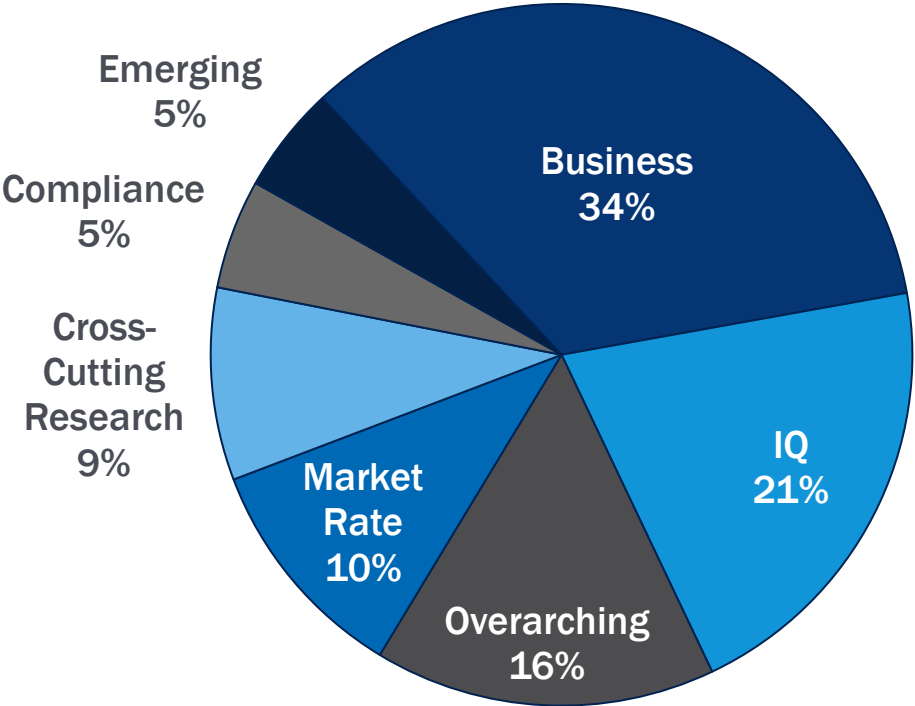
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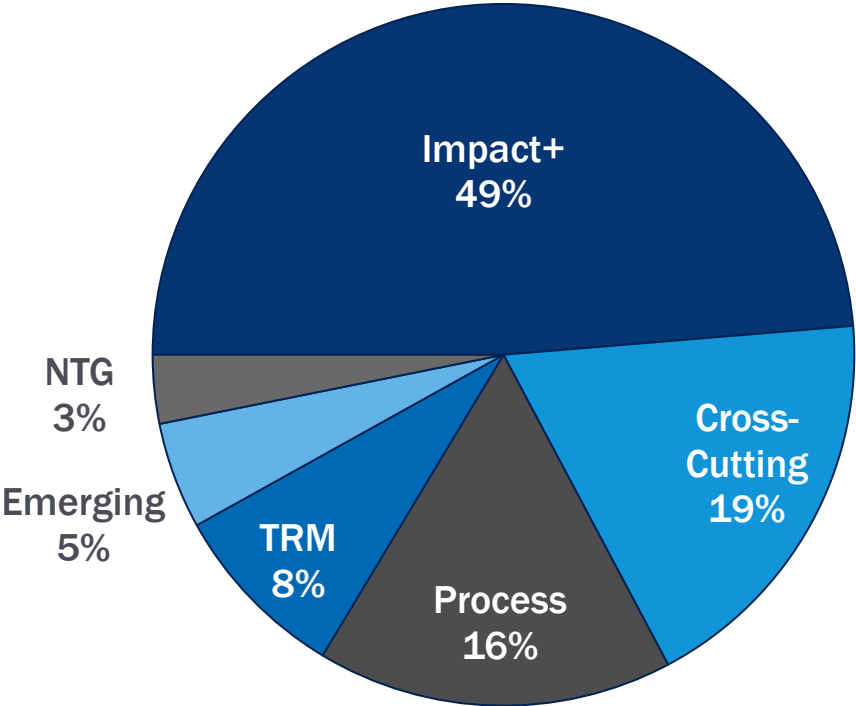
BUDGET OVERVIEW

2025 DRAFT EVALUATION BUDGET BREAKDOWNS

BY SECTOR



BY ACTIVITY TYPE





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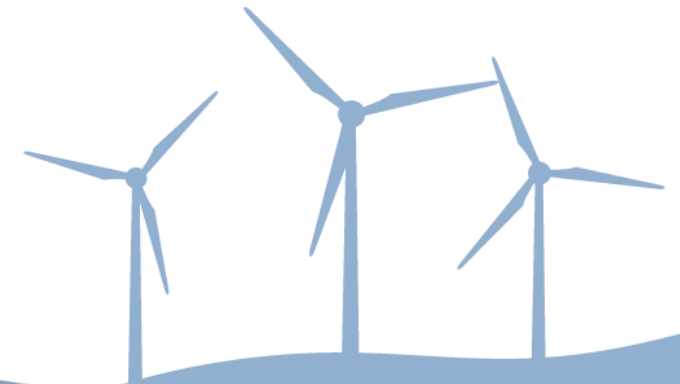
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