

**Illinois EE Stakeholder Advisory Group
Large Group SAG Meeting**

**Tuesday, September 10, 2024
10:00 am – 2:00 pm
In-person Meeting with Teleconference Option**

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- [SAG Facilitator Presentation: Introduction to September 10 Meeting](#)
- [Ameren Illinois Presentation: Draft 2026-2029 Energy Efficiency Plan](#)
- [Illinois EPA Presentation: Inflation Reduction Act Home Energy Rebate Programs Update](#)

Attendees

Name	Company or Organization
<i>In-Person Attendees</i>	
Celia Johnson	SAG Facilitator (Celia Johnson Consulting)
Jane Anderson	Inova Energy Group (SAG Meeting Support)
Pat Justis	Ameren Illinois
Matt Armstrong	Ameren Illinois
Fernando Morales	Ameren Illinois
Samantha Stahl	Ameren Illinois
Andrew Cottrell	Scott Madden
Victoria Nielsen	Scott Madden
Abigail Miner	IL Attorney General's Office
Andy Wahrer	Primera Engineering
Melissa Helpingstine	Primera Engineering
Annette Beitel	Future Energy Enterprises (IQ South Sr. Facilitator)
Nelson May	Future Energy Enterprises (IQ South Facilitation Team)
Zach Ross	Opinion Dynamics
Larry Kotewa	Elevate

Name	Company or Organization
Jean Gibson	Peoples Gas & North Shore Gas
Lilieric Florez Monroy	Peoples Gas & North Shore Gas
Danish Murtaza	Peoples Gas & North Shore Gas
Hannah Howard	Opinion Dynamics
Karen Lusson	National Consumer Law Center (NCLC)
John DeRosa	Illinois EPA, Office of Energy
Kim Janas	IL Attorney General's Office
Kim Swan	ComEd
Elder Calderon	ComEd
Joe Mays	Cascade Energy
John Seryak	Runnerstone, representing IL AG's Office
Charlie Schreier	Runnerstone, representing IL AG's Office
Maddie Wazowicz	MEEA
Kit White	MEEA
Chris Neme	Energy Futures Group, representing NRDC
Kari Ross	NRDC
Heidi Gorrill	Slipstream
Cassidy Kraimer	Community Investment Corp.
<i>Virtual Attendees</i>	
AJ Young	U.S. Greenlink
Alan Elliott	Opinion Dynamics
Alex Deeb	Ameren Illinois
Amy Jewel	Elevate
Andrew Braatz	Franklin Energy
Andrey Gribovich	DNV
Andy Gorecki	Franklin Energy
Andy Vaughn	Leidos
Angie Ziech-Malek	DNV
Anu Shree	Bidgely
Ashley Bukowski	ICC
Ashley Palladino	Resource Innovations
Bruce Liu	Nicor Gas
Barbara Stapleton	The JPI Group
Ben Dueweke	Walker-Miller Energy Services
Bill Risley	Franklin Energy
Brent Nakayama	Leidos
Bryan Haney	Erthe Energy Solutions
Cameron Seeley	Walker-Miller Energy Services
Chad Balthazor	Cascade Energy
Cheryl Watson	Equitable Resilience & Sustainability
Chris Vaughn	Nicor Gas
Christina Frank	Peoples Gas & North Shore Gas

Name	Company or Organization
Corey Posten	Recurve
David Kilgore	Ameren Illinois
Denise Munoz	ComEd
Dylan Royalty	Scott Madden
Elena Savona	Elevate
Elizabeth Applegate	Applied Energy Group
Elizabeth Horne	ICC Staff
Eljona Fiorita	CLEAResult
Emily Golen	Resource Innovations
Erin Daughton	ComEd
Erin Stitz	Applied Energy Group
George Smith	BCMW Community Services
Grey Staples	Mendota Group
Shawn Haas	Peoples Gas & North Shore Gas
Hilary Snover	CLEAResult
Jamie Capece	Elevate
Jason Fegley	Ameren Illinois
Jeff Mitchell	Resource Innovations
Jessica Citrola	Scott Madden
Jim Fay	ComEd
Jim Heffron	Energy Solutions
Jim O'Shaughnessy	Energy Infrastructure Partners
John Carroll	Ameren Illinois
John Lavallee	Ameren Illinois
Jonathan Kleinman	Brillion
Jonathan Skarzynski	Nicor Gas
Josh Ramos	Nicor Gas
Josh Sharon	ComEd
Julia Friedman Opower	Opower
Julie Hollensbe	ComEd
Kanchan Swaroop	Resource Innovations
Kari McCue	Nicor Gas
Kathryn Brewer	CLEAResult
Keith Cronin	VEIC (IL-TRM Administrator)
LaJuana Garrett	Nicor Gas
Lance Escue	Ameren Illinois
Larry Kotewa	Elevate
Leyah Williams	ICC Staff
Linda Zabors	Energy Infrastructure Partners
Lucas Born	Power Takeoff
Meredith Lamb	Enbridge
Mark Mandolini	Honeywell

Name	Company or Organization
Mark Szczygiel	Nicor Gas
Mia Berrios	People for Community Recovery
Michele McSwain	SEEDS
Mike King	Nicor Gas
Nicholas Burstein	CMC Energy
Nick Lovier	Ameren Illinois
Nick Warnecke	Ameren Illinois
Nikki Pacific	Walker-Miller Energy Services
Nora Fitton	ICC
Jarred Nordhus	Peoples Gas & North Shore Gas
Olivia Wein	NCLC
Omayra Garcia	Peoples Gas & North Shore Gas
Oxana Petritchenko	Guidehouse
Paige Dunlevy	ICF
Paige Knutsen	MEEA
Patrick Burns	Brightline Group
Paul Higgins	Abacus Energy Works
Peter Widmer	Power Takeoff
Philip Halliburton	ComEd
Philip Mosenthal	Optimal Energy, representing NCLC
Rick Tonielli	ComEd
Randy Opdyke	Nicor Gas
Rashaan Keeton	Center for Energy & Environme
Rocco Guaragno	Resource Innovations
Ronna Abshure	ICC
Sam Lamos	Gradient Comfort
Samuel Morris	The Will Group
Sanjyot Varade	Resource Innovations
Seth Craigo-Snell	SCS Analytics
Sophie Frey	Brightline Group
Sumi Han	DNV
Tamika J. Cole	Walker-Miller Energy Services
Tara Cunningham	Rinnai
Ted Weaver	First Tracks Consulting, representing Nicor Gas
Theresa Collins	Senior Services Plus
Tiffany Pickett	Resource Innovations
Tina Grebner	Ameren Illinois
Tisha Burnside	Resource Innovations
Travis Hinck	GDS Associates
Wade Morehead	Morehead Energy
Wendy Jaehn	Resource Innovations
Zach Obert	Franklin Energy

Name	Company or Organization
Zach Ross	Opinion Dynamics
Zachary Froio	Applied Energy Group

Meeting Notes

See **red text** for follow-up items.

Opening and Introductions

The purpose of the September 10th meeting:

1. For Ameren Illinois to present the draft 2026-2029 Energy Efficiency Plan; and
 2. For Illinois EPA to present an Inflation Reduction Act update to SAG, as a follow-up to the [March SAG meeting](#).
- [SAG Facilitator Presentation: Introduction to September 10 Meeting](#)

Ameren Illinois 2026-2029 DSM Plan

Pat Justic and Matt Armstrong, Ameren Illinois

Ameren Illinois Team Introduction

- Started planning in 2023, held workshops with stakeholders to ensure all voices were heard in the draft portfolio
- Ameren Illinois
- External partners
 - Brillion
 - Leidos – prime implementor
 - Scott Madden

Meeting Goals

- Overview of draft portfolio vision and objectives
 - Communicate portfolio vision and objectives
- Draft portfolio overview
 - Highlight program elements and changes driving budget and savings
- Stakeholder feedback
 - Collection of feedback on draft portfolio

IQ Portfolio and Programs

Annette Beitel, Future Energy Enterprises

- CBO input and engagement is important
- IQ South has a series of subcommittees – CBOS and CAAs appreciate participating in substantive committees rather than large groups
 - IQ South has 3 active Subcommittees
 - Participating orgs – CBOs and CAAs in Ameren’s service territory, diverse implementors, 10 returning citizens who are part of nonprofits
- IQ South CBOs will be engaged in a separate process with Ameren IL. Meetings scheduled from mid-October to December. Will be looking at measures, and programs, not savings goals.

Presentation Agenda

- Draft portfolio overview
 - Vision, pillars and objectives
 - Design overview
 - Portfolio overview
- Draft program overview
 - Business program
 - Residential program
 - Income qualified
- Market Development Initiative (MDI)
 - Diverse Spend
 - MDI deep dive
- Other portfolio items
 - Market innovation
 - Third party programs
 - Additional EE plan updates
 - Policy updates

2026-2029 Draft Portfolio Vision

- Ameren EE spending in 2008 was \$10 million.
 - Have surpassed a billion dollars this cycle in EE. Will payback roughly 3x in benefits to our customers
- Cost effectiveness for this cycle is key, also focused on reducing emissions.
 - Need more contractors, partners and workers in this effort.
- Vision: Enabling customers and communities to thrive by investing in energy efficiency programs that change lives
 - Reaffirming that this is what is important to us in developing this plan.

Portfolio Vision Pillars

- Reduce Energy Costs & Improve Customer Health
 - Deliver comprehensive programs for comfort and savings
 - Leverage all funding opportunities
 - Continue offering Healthy Homes (Air Quality Pilot) & Health & Safety repairs
- Increase Benefits in Disadvantaged Communities
 - Reaffirm commitment to IQ programs and EE workforce development
 - Utilize data to better serve customers having high need
 - Increase support to business customers
- Empower & Guide Customer Transition
 - Deliver a streamlined customer journey for a better experience
 - Support business customers in meeting sustainability goals
 - Assist community partners in CEJA funding opportunities

Building out Communities a Brighter Futures

- 22 community-based organizations brought energy efficiency education and discount information to customers, helping their homes become more energy-efficient, so they can save each month on their energy bills (22 CBOs in 2023; 27 CBOs in 2024 to date)
- Over \$68,000 awarded through Co-Pay Assistance Grants to help diverse-owned small businesses and non-profit organizations participate in the Small Business Direct Install Initiative, which helps small businesses become more energy-efficient through lighting and refrigeration

- Since 2018, Ameren IL has spent \$201 million in helping Income-Qualified (IQ) customers make their home more energy-efficient
 - IQ customers have already saved \$76 million on their electric bills and over \$13 million on their natural gas bills
- 8 contractors sponsored through the Diverse Program Ally Incubator
- In 5 years, the \$201 million investment will have saved IQ customers \$225 million on their energy bills
- Over \$40 million spent on diverse suppliers and program allies (2023)

Workforce Development

- 289 workforce development opportunities were provided to help current and future jobseekers find a new role in the energy field. These opportunities include:
 - 47 jobseekers finding employment
 - 56 jobseekers finding training
 - 14 paid internships with 13 employers
 - Positive feedback.
 - Often result in permanent job offer
 - 2024 – 12 interns, 9 retained by employers.
 - Want to double or triple cohort
 - 42 students receiving scholarships at 7 community colleges
- Focus is on job force and future employers
- Community Action Agencies (CAA) experience challenges with hiring workers – Ameren Workforce Development (WD) team conducted series of meetings to better understand CAA needs. Ameren had a hiring event in the community with focus on diverse hiring
 - 80% of individuals went on to be interviewed by the CAA, and 60% advanced through final round
 - Video on energy efficiency workforce: [Travis - A Energy Efficiency Workforce Journey on Vimeo](#)

Draft Portfolio Objectives

- Strong Community Investment
 - Continue high level of Income Qualified (IQ) Investment
 - Continued focus on serving small businesses within Disadvantaged Communities
 - Continue Health and Safety measure delivery
- Effective Program Planning
 - Expand impactful & successful programs, test new ideas through pilots, and pivot from or improve as needed
- Comprehensive Offerings
 - More integrated, streamlined, and comprehensive offerings to remove participation barriers for customers
- Expand Workforce Development
 - Expand Market Development Initiative (MDI) and Trade Ally Support
 - Increased funding
 - Growth for new allies/workforce and expansion CBO partnerships
 - Focus on training and development of existing allies

2026-2029 Design Process

- Identify key focus areas and plan vision
 - Future Proofing Discussion with Stakeholders
 - AIC Operations team

- AIC Leadership
- Develop model and plan
 - AIC core planning team
- Internal and external input
 - AIC Core Planning & Operations Team
 - AIC Leadership
 - Stakeholders/ SAG – collected program design considerations
 - LIEEAC
 - Potential Study Working Group
- Negotiation and filing preparation
 - Negotiation with Non-Financially Interested Stakeholders
 - Discussions LIEEAC
- Hopeful this is the start of the path towards reaching settlement. Want to get to settlement by December 20, 2024, to get everything filed by March 1st.

Goal Overview

- There are existing challenges with cumulative existing framework in IL.
- Ameren will be seeking reduced goals for the 2026-2029 Portfolio
 - Ameren's 2026 plan will require both a reduction of Cumulative Persistent Annual Savings (CPAS) goal and applicable annual energy goal in energy savings for all four years of the plan.
- Independent Statewide Potential Study draft results show that reduction is necessary
 - Still in draft form.
 - Shows that Ameren PE savings are less than outlined in Clean Energy Jobs Act. Not presenting any goal reduction amount today. This will be the subject of further discussions with stakeholders throughout negotiation process

Draft Goal Methodology

- Proposal for similar methodology to 2022-2025 calculation.
- 2026-2029 reduced goals will be calculated as the 2025 reduced CPAS goal, plus the reduced AAIG increase for each year
 - Start with 2025 reduced CPAS goal as starting point, would propose that whatever agreed upon increased AAIG will be layered upon CPAS goal. Carry that same methodology going forward.
- Recognizing there may be some mathematical mechanics.

Chris Neme: Is Ameren presenting a goal achievement today or how will the plan stack up against statutory goal?

Matt Armstrong: We're going to present overall savings that we would achieve from proposed portfolio. But not showing how those stacks upon statutory goal.

Comment via chat: CPAS = Cumulative Persistent Annual Savings; AAIG = Applicable Annual Incremental Goal

High-Level Portfolio Overview

- Table in upper right corner outlines budgets for electric and gas and savings for both electric and gas.
- Have one section that includes Voltage Optimization (VO) and gas conversions.
 - There's a separate piece of table that excludes those as well
- Note:

- Budgets are preliminary. The numbers are based on what is in the current plan. Ameren will file a plan in March with preliminary budget based on 2022 opt out numbers.
 - Proposal to file compliance filing in early 2026 when we have final list of customers who have filed to opt out and verified their usage through calendar 2025 that they are eligible to opt out
- Highlights
 - Combined investment of \$145 M annual average Electric and Gas budgets have increased
 - Voltage Optimization (VO) smaller portion of savings
 - Portfolio is highly cost effective – TRC above 3.0
 - WAML – 13.24 electric, 14.50 gas 4-year avg
 - Lighting coming out of portfolio has significant impact

Karen Lusson: At \$135 million total, the increase is about \$10 million from existing plan annually?

- *Matt Armstrong: Yes*

John Seryak: Is electric megawatt hours savings inclusive of gas savings converted to megawatt hours or is it separate?

- *Matt Armstrong: For gas conversion, we are taking from gas and counting as electric. It is inclusive of the therms that have been converted.*

Phil Mosenthal: What is the cost per kWh for non-IQ spending?

- *Matt Armstrong: Not sure if we provide yields at the program level yet.*

Zach Ross: Voltage optimization is smaller savings than last cycle. Estimating 13 hours.

- *Matt Armstrong: Current plan is \$86,000/year. \$15-18,000 in next cycle.*

Annette Beitel: Cost per therm – what percentage is incentives vs non-incentives in total dollars spent?

- *Matt Armstrong: 51% incentives, 49% non-incentives.*

Question: What is the voltage optimization going forward – for new circuits?

- *Matt Armstrong: Yes, new circuits. Have circuits already done this and last plan, looked at cost effectiveness of remaining circuits. This is inclusive of those remaining that are cost effective.*

Annette Beitel: Question on TRC. How were you able to achieve lower cost effectiveness? Drivers? Why is it higher for this cycle?

- *Matt Armstrong: The primary driver is the carbon adder that we worked through with the statewide potential study group to refine the TRC inputs. The carbon adder changed significantly in methodology.*
- *Annette Beitel: That's new compared to the current plan?*
- *Matt Armstrong: Yes, new methodology from current plan.*
- *Chris Neme: The current carbon adder is based on the most recent U.S. EPA estimate of the SCC published in 2022. The group reached agreement last week to use 2% real discount rate. Previous plan cycle cost of carbon was based on 2015 federal government estimate at a higher discount rate. Those numbers are evolving over time as administration updates analyses.*

High-Level Program Overview

- Broke out residential market rate out of IQ
- Highlights
 - Ameren IL intends to maintain high investment in IQ for both electric and gas
 - Combined budget of \$55.6M – is an increase from what was spent in 2023 – 6% increase.
 - Business program largest electric savings
 - High gas IQ program investment to support whole building dual fuel customers
 - Portfolio as designed now is compliant with statute requirements
 - Min budget requirements for public sector, for public housing, ratio for single fam and MF to what's in the service territory, requirement that 80% of LI budget for whole building weatherization

Chris Neme: When add up numbers for sectoral budgets for electric side it's \$102 million, previously shown 26 million.

- *Matt Armstrong: Yes, going to hit portfolio level costs soon. This excludes conversions, so some of that is in there too. In IQ gas side, 42 and 13 approx. A lot of 13 gets converted to electric side. It is useful to show pre-conversions.*

Business Program Overview

- Six main initiatives with several different initiatives targeting different business types and delivery methods
 - 1. Standard
 - No changes from current plan
 - 2. Small Business
 - Area where we are proposing the most significant changes
 - Small business initiative has direct install and separate whole home channel. Proposal is to bring these two together and have channels that are intended to serve a whole building approach
 - Standard – current initiative
 - Enhanced – focused on nonprofits. Incentives would be enhanced
 - DAC – could include nonprofits in DACS, designed to have enhanced incentives. Incentives increased by 20% in enhanced and DAC compared to standard
 - 3. Midstream
 - Some changes
 - Lighting – ramping down over time. Recognizing there's a market change occurring. Lighting shifted to advanced lighting controls
 - Statewide – intend to continue
 - Eliminated business midstream HVAC – have seen very low volume. Customers can be served in same through the standard channel, more streamlined approach.
 - Note: Streetlighting initiative is no longer present. Opportunity for streetlights is far behind us. No dedicated initiative for this sector
 - 4. Custom
 - 5. Retro-Commissioning
 - 6. Business Market Transformation

Chris Neme: The more intentional streetlight program gone, but will you still be addressing replacements on burnout opportunities as they arise. Which buckets does that get housed.

- *Matt Armstrong: It goes in the standard prescriptive.*

Business Program

- Table breaks out the associated savings of the electric and gas budgets for the 6 initiatives in the business program
- Highlights
 - Largest investment in the Small Business initiative at \$20.7 million
 - Largest contributor to savings
 - Small Business and Standard offerings for electric, Custom on the gas side
 - Reduced investment in Midstream Initiatives -> Legislation and NTG risk
 - Inclusion of DarkSky compliant bonus of indoor lighting element (accounts stakeholder feedback we've heard)
 - Top saving measures include
 - Custom projects, LED interior directionals, networked lighting controls, RCx, and linear replacements.

Annette Beitel: Where are you serving agricultural measures/customers?

- *Matt Armstrong: Answer is in the standard prescriptive. Biggest measure is grain dryers.*

Annette Beitel: What are the custom projects?

- *Matt Armstrong: There's not one big bucket. The projects are pretty unique in nature, nothing that is a standard.*

Residential Program

- Five initiatives (non-IQ) and nine channels that are diversified by delivery channel/method or target market.
- Market Rate Single Family (SF), Market Rate Multifamily and Public Housing are the whole home offerings under this program
- Non-IQ
 - Portfolio intended to build upon success of current plan
 - Ameren intends to revamp Market Rate Single Family initiative. Looking to mirror Income Qualified SF delivered now. Have a Home efficiency specialist acting as prime contact for customer. Would work closely with customer as a home scheduler and help identify the direct opportunities that come from assessment.
 - Have removed the efficient choice tool – was part of current plan and moved away from because of minimal savings and data challenges
 - Have removed general service lamp lighting, recognizing changes to federal standards around lighting.
 - Shifted retail products – shrunk from where it is in current plan. Dollars shifted to new measures, like electric lawn equipment

Question: Are you going to be doing any General Service Lighting (GSL) through any channels?

Matt Armstrong: We see an opportunity for direct install through statewide potential study. Many customers without ELDS in any socket. As currently designed, have no GSL lamps.

Annette Beitel: IQ South Committee strongly supports keeping GSLs in the plan. Feedback on this will be provided.

Elizabeth Horne: Are you introducing new programs in residential programs and what category?

- Matt Armstrong: No, no new channels or initiatives are being proposed.
- Elizabeth Horne: Are you including any programs with braided funds with Ameren's beneficial electrification program?
- Matt Armstrong: No, we do not have anything in the draft portfolio that directly integrates with Beneficial Electrification plan.

Elizabeth Horne: In the Integrated Grid Plan, there are plans for an Optimization Plan. The current plan expires in December, and an update wasn't included in the Integrated Grid plan. Are you moving to have an updated plan in the Energy Efficiency plan?

- Matt Armstrong: Referring to original Voltage Optimization plan tied to 2018 EE plan – is directly relative to VO 8103-B. The VO savings intending to claim in 2026 are associated with the integrated grid. Will not be any separate VO plan or no need to update VO plan that was part of 2018 because the VO intends to claim is aligned and outlined through the Integrated Grid plan.
- Elizabeth Horne: Where will you be addressing those plans as far as VO? Needs to be some language in the EE plan if going to claim savings.
- Andrew Cottrell: I think it's in Appendix R of grid plan.
- Elizabeth Horne: I would like to talk about this offline. Testimony for Integrated Grid plan talks about upgrading that plan or what it looks like since its expiring in December.
- Ameren to follow-up with ICC Staff on voltage optimization.

John Seryak: What is the Single Family Market Rate HVAC program – do you promote heat pumps for gas furnaces?

- Matt Armstrong: Yes, are promoting heat pumps.
- John Seryak: If a customer has a furnace or AC, is it a priority to encourage heat pumps or will you advise for furnace replacement?
- Matt Armstrong: It's not considered a priority. We want customers to be able to choose their fuel. If customer has an interest in electrifying, we are supportive and can serve them in that way. But we want customer to have the opportunity to leave a gas furnace in as a backup.

Kari Ross: Can you talk more about Market Rate Multifamily?

- Matt Armstrong: There's a focus on heat pumps in Market Rate Multifamily. We see a need there.
- Chris Neme: The Potential Study suggest 70% of multifamily housing has electric heat.
- Matt Armstrong: We want to target electric resistant users. Looking to continue efforts.

Annette Beitel: How are you thinking about braiding funds – heat pumps with market rate multifamily, large federal tax incentive credits and utility credits. What about the role of federal tax credits?

- Matt Armstrong: For the single-family side, we are promoting those tax credits as we're delivering the programs. Incentives can be lowered potentially. On multifamily side, we're not sure on the mechanics as we're thinking about this as far as tax credits and whether property owners can claim tax credits on heat pumps.

Residential Program (Non-IQ)

- Highlights
 - Largest investment in Market Rate SF and Retail Products Initiatives
 - (Midstream HVAC and POP Retail Products)
 - Market Rate Single Family increased budget to support expanded measures and assessment design
 - Products and kits offerings budgets reduced pivoting away from lighting
 - Incorporation of furnace standard drops savings in latter portfolio years
 - Top saving measures include heat pumps, thermostats, ceiling/attic insulation, weatherstripping
 - Have a designated market transformation bucket

Income Qualified Initiative

- The Income Qualified Initiative under the Residential Program houses many diverse channels to serve income qualified customers
 - 12 channels balance to provide strong investment and whole home offerings.
 - Whole home offering channels – IQ SF, IQ MF, CAA, manufactured homes and electrification channel
- Joint utility lives within IQ SF. Intend to continue coordination with Nicor in Bloomington-Normal.
- Channels are maintained, but measure mixes have shifted due to removal of lighting offerings (ex. Kits)
- Stronger investment in whole home offerings
- Looking to ramp up Accessibility Pilots, Manufactured Homes (still a great need there), and Healthier Homes

Annette Beitel: Can you provide more detail on electrification approach?

- *Matt Armstrong: Electrification is a continuation of current efforts. It's focused on propane users in territory that have electric service and removing all propane-using equipment and electrifying their homes.*
- *Karen Lusson: Previous presentations indicated facing hurdles of propane customer switching to gas.*
- *Matt Armstrong: Noted. Electrification efforts have continued to evolve. Our marketing efforts started very focused, and a broader one is needed. We feel there is more opportunity in the market. The budget is at around \$1.5million/year for electrification. In the current plan, the budget was \$8 million over four years. Started out approaching electrification with a lot of unknowns, but now have a better handle of the hurdles and better use of budget*
- *Karen Lusson: There's a size difference between the number of electric customers and the number of gas customers, and a portion are Nicor customers. Is that a small portion relative to propane?*
- *Matt Armstrong: We have 1.3 million electric customers and about 800,000 gas customers. We have done extensive investigation on the opportunity for propane users in service territory. Will provide follow-up information.*
- *Annette Beitel: We've looked to understand where propane customers exist in Ameren's territory. We have a map that shows this—there's very discreet pockets with heating oil and propane gas.*

Question: Can you talk more about the accessibility pilot?

- *Matt Armstrong: It's designed to help customers with disabilities. For example, installing smart home devices for more cost that helps promote independence and functionality in the homes. The goal is to help customers improve safety and livability within their means.*

Income Qualified Initiative

- Electric and gas savings in budget broken out by all the channels.
- Highlights
 - Increased investment in IQ SF, IQ MF channels
 - Also, among largest contributors to savings
 - Electrification remains targeted at propane customers
 - Electric Health & Safety
 - 15% of whole building, 13% of total IQ E
 - Whole building spending
 - 92% for electric, 76% for gas
 - Top saving measures include - Heat pumps, shower heads, thermostats, air purifiers

Chris Neme: Is the growth trend for the MF IQ anticipated to continue through 26-29? Growth trajectory of IQ MF channel.

- *Matt Armstrong: We have an increase in budget and savings. In 2023, the number of heat pump incentives was 586 and 2026 has 695 heat pumps. That trajectory continues to increase in the four years of the plan. We are seeing great pipeline in IQ MF heat pumps, and it's designed to continue serving pipeline.*

Karen Lusson: Can you provide budget numbers for both CAA and SF programs?

- *Matt Armstrong: CAA spend - \$3.6 million on electric, 1.6 gas. This year, \$600k over that. For SF IQ, \$23.3 million. Is a \$4 million increase from last year.*

Karen Lusson: Did you consult with DCEO / IHWAP about expanding participating programs?

- *Matt Armstrong: Through current efforts, continuously collaborating with DCEO and CAA. Continue to see challenges with production capacity of CAA related to workforce. Have made strong investments in the channel in growing the workforce (like funding for back office support, equipment grants, etc.), but even with additional funding sources, CAAs are seeing the same challenges. Current portfolio anticipates same challenges and following same trajectories.*

Abigail Miner: When you mention heat pumps, are they electric or gas?

- *Matt Armstrong: All the heat pumps included are electric. We have not designed the portfolio with any gas heat pumps.*

Chris Neme: Have you incorporated IRA dollars as it relates to Ameren IQ budget?

- *Matt Armstrong: We have not made any assumptions on savings from IRA efforts. It's too hard to know about when they will be provided, what the savings are, etc. Have proposed set aside dollars in below line.*
- *Chris Neme: Once you know savings and ability to leverage IRA better, would the savings number that are projected here thus far be able to grow?*

- *Matt Armstrong: Possibly. We will need to have more detailed discussions and figure our mechanics of attribution or savings amount. We've been actively engaging to understand DCEO's thinking, but there's still a lot of unanswered questions.*

Annette Beitel: What is the role of gas furnaces in the IQ portfolio for the next cycle?

- *Matt Armstrong: Similar to heat pumps, we do have gas furnaces included to give customers an option in how they heat their homes. We can't just cut off incentives for gas furnaces.*
- *Annette Beitel: The IQ South Committee strongly supports including gas furnaces incentive in program because 1) In replacement circumstance, many savings to be had with early replacement gas furnaces and 2) the market is not ready for exchange for gas furnace to ASHP.*

Portfolio Level Costs (Below the Line)

- **Highlights**
 - Aligning below the line costs across electric and gas portfolios.
 - Addition of MDI budget for the gas portfolio.
 - 3.5% of electric budget and 3.5% of gas budget designated for MDI.
 - Added budget categories for trade ally support and IRA coordination to support program delivery and leveraging of funding.
 - \$250,000 set aside
 - Total below the line costs: 15.9% of total electric budget, 16.3% of total gas budget

Chris Neme: Is trade ally support part of program admin or marketing?

- *Matt Armstrong: We're providing a new focused effort on the technical aspect of trade ally. Would be captured in non-incentive type of costs. It's principally technical and support focus – recognizing that a lot of trade allies are not comfortable with heat pump tech.*

Chris Neme: How did you determine marketing and evaluation portfolio costs?

- *Matt Armstrong: It's tied to a percent but recognize the buildup and need is there. Without lighting in the next plan, efforts will be whole home comprehensive, so the marketing budget to get people involved will be more.*
- *Chris Neme: Is there no marketing within individual program budgets?*
- *Matt Armstrong: There's some marketing in non-incentive budgets. We haven't fully spent marketing budget in the past, but with the significant shift in plans we will need more of a marketing focus.*

Annette Beitel: What percentage of the evaluation budget is process vs impact evaluation?

- *Matt Armstrong: 3% for evaluation – capped at 3% per the statute.*
- *Zach Ross: Will follow up with numbers on this.*

Kim Janas: Will you provide portfolio level cost information from the current EE Plan so we can compare?

Chris Neme: Observation – the electric budget is going up about \$6 million. Almost all of the increase is portfolio level cost, this seems problematic.

- *Matt Armstrong: Not sure if that is entirely accurate. May need to talk more to lay numbers out in front of us.*

Market Development Initiative

- Ameren created the MDI model when we put 2018 plan together; it has become a model for other programs
- Programs focused on business development, workforce development, and community partnership
- Three main goals:
 - Engage customers who have not previously benefited from energy efficiency.
 - Increase number of energy efficiency jobs available to local and diverse candidates.
 - Support new or growing energy efficiency businesses.

Diverse Spend since MDI Conception

- Allocated about 3% of budget to MDI
- 2017 - \$3.8 million, represents status quo
- Put significant efforts into MDI. Initial efforts:
 - Workforce Development
 - Trade ally incubator
 - Vendor grants
 - Refined RFP processes that focus on assisting diverse vendors through the bidding process
 - Intentional incorporation of market development values

MDI Business Development

- Business Development:
 - Diverse Vendor Database
 - Workforce Development Offerings
 - Program Ally Incubator
 - Diverse Ally Grants
- 2026-2029 Plan Goals
 - Expand network of Diverse Vendors in the territory
 - Intentional outreach
 - Increase utilization of new and existing Diverse Vendors
 - Strengthen the connection with Diverse Vendors and the Workforce Development Program offerings
 - Increase focus on building Diverse Vendor growth and capacity
- Business Development:
 - Diverse Vendor Database
 - Workforce Development Offerings
 - Program Ally Incubator
 - Diverse Ally Grants

Vendor Highlight: Richard Graphics (certified women-owned business enterprise)

- In 2021, the Program was seeking a local vendor to help with printing and giveaway needs.
- The Diverse Procurement Database was used to identify a vendor in the service territory that could assist with this request.
- Richards Graphics now provides printing services across the Program and provides an Online Store for Program partners and employees to receive free marketing collateral.
- Link to video: [MDI Employment Spotlight on Vimeo](#)

MDI Community Partnerships

- Community Partnerships:
 - Grant Writing Support
 - Relationship Management
 - Increasing customers engaged
 - Events
 - Program Referrals
 - Kit Distribution
- 2026-2029 Plan Goals:
 - Build our CBO & CAA network throughout the territory
 - Increased focus on program referrals
 - Continued focus on grant writing services
 - See the need to expand partnerships – some pockets in territory that do not have relationships. Have room in the budget to do that.

MDI Workforce Development

- Workforce Development
 - Scholarships
 - Internships
 - Training
 - Job Placement
 - Wrap-around services
 - Staff Grants
- 2026-2029 Plan Goals:
 - Continue focus on maximizing the number of jobseekers served with focus on local diverse candidates
 - Focus on correctional facilities and returning citizens
 - Enhance technical training offerings
 - Build CBO & CAA capacity with well trained workforce
 - Employer focused training

Karen Lusson: Can you talk about connection between training and making sure the person gets a job?

- *Sam Stahl: Based off trainings done recently, when the employer sees local talent in the community gaining technical skills, it helps with retention and the employer understand where the employee is coming from.*
- *Karen Lusson: As part of the training, are they implementors or subcontractors?*
- *Sam Stahl: Some of implementors like SEAL are working with community partners to host job training. It depends on various program. Could be through contractor.*
- *Karen Lusson: Important that the job connection is part of the program.*
- *Sam Stahl: We're focused on retaining positions and expand careers in energy.*

Other Portfolio Items

Market Innovation

- Market Transformation Initiatives
 - MTIs launched in 2022 - 2025 plan:
 - High Performance Windows and Luminaire
 - Level Lighting Controls
 - Provide demonstrable savings in 2026 Plan

- LLLC ~ 2,900 MWh/year
 - HPW ~ 484 MWh/year
 - Have accounted for savings for a few programs in current plan
 - Have not accounted for any savings in the plan for those, since it takes time to stand them up and realize savings in the market
 - MTIs in 2026 - 2029 draft plan:
 - ENERGY STAR Retail Products Platform
 - High Efficiency RTUs
 - High Efficiency Dedicated Outdoor Air HVAC
 - Portable Window Heat Pumps
- Research and Development
 - AIC has not identified a dedicated Breakthrough Equipment and Devices (BED) budget.
 - AIC does see a need to innovate and better support the market through additional Trade Ally Support and potential pilots.
 - Trade Ally targeted support
 - Specific to comprehensive initiatives
 - Marketing support for new and existing allies
 - Technical training on efficient equipment

Chris Neme: For market transformation, are you continuing high performance windows (HPW) and luminaire level lighting controls (LLLC)?

- *Matt Armstrong: Yes, we are continuing both.*

Annette Beitel: Are you capturing market lift from market transformation initiatives?

- *Matt Armstrong: Yes, there are savings associated with LLLC and HPW efforts*

Third Party Programs

- Ameren Illinois is focusing in on those areas of the portfolio that we feel could perform better and those where a program delivery design is proposed in the draft 2026 plan.
- At this time, we are still considering which sectors of the portfolio will be used to meet the third-party solicitation process requirements.

Additional EE Plan Updates

- Diversity Spend Commitments
 - Ameren intends to continue achieving year over year growth of spending with diverse businesses supporting its portfolio
- EE Financing
 - Slipstream contract extended
 - AIC is awaiting the outcome of the EEUP
 - Have worked with other utilities that allow On Bill Financing (OBF) to continue
- Leveraging other Funding
 - Federal funding (to the extent additional information is available from IL EPA)
 - Other local funding, including CEJA grants
 - With a focus on connecting local organizations with the funding that best fits their mission
- BTU Conversion for Alternate Fuels
 - AIC will continue to identify opportunities to conduct BTU conversions for propane or natural gas as allowed for in the law.
 - Anticipate continuing similar methodology as in the current plan

- Electrification Bill Impacts Update
 - AIC will continue using the bill impacts methodology previously shared, periodically updating energy costs used in the tool.
 - Policy manual suggests we have a discussion on how the bill impacts is updated
 - Update energy costs every 6 months as discussed with stakeholders

Annette Beitel: How does Ameren's plan account for low income discount rates and electrification bill impact analysis?

- *Matt Armstrong: We're working right now to update that. Low income discount rates will be implemented later this year, working to update the tool to reflect those anticipated changes in cost of gas.*

Policy Updates

- Apply 100% NTG for disadvantaged areas policy to Equity Investment Eligible Communities (EIEC's)
- Biannual SAG reporting
 - Currently utilities prepare reports on quarterly basis, consist of both excel spreadsheet and pdf doc. These take significant administrative resources. Biannual reporting structure would be beneficial to all parties involved and help Ameren deliver more projects to customers.
- Deemed savings attribution for IRA projects
 - Will need more discussion on this topic.
- Allowance of linear commercial lighting for SBDI and midstream for duration of Plan
 - Recognize there is the Clean Lighting Act that was signed into law recently. We see some opportunities left in the market for linear commercial lighting. Looking to work with stakeholders to create a policy that will allow this to continue,
- Allow 50/50 funding split for all projects with common measures in Community Action Agency channel
 - Currently experiencing reduction in projects completed in CAA channel.

Karen Lusson: Right now, the problem is that utility funding does not do central air?

- *Matt Armstrong: Yes. A 50/50 funding split would make it easier on CAAs and would result in increased production on the homes.*

Chris Neme: The assumption is that linear lighting is declining over four-year plan cycle. Is that consistent with this? Or would you change the trajectory if agreed upon element?

- *Matt Armstrong: We're open to discussion on that. Looking to the Potential Study to see if ramp down is appropriate. Only ramping down mid-stream direct install lighting at the same level*

Annette Beitel: What does deemed savings for IRA projects mean?

- *Matt Armstrong: An agreement that we would partially fund the projects that happen with IRA dollars, being blended or braided, but Ameren would get to count 100% of the savings. This likely wouldn't be a 50/50 funding split.*

Portfolio Outlook

- Portfolio Refinement
 - Continue to refine portfolio based on external/internal feedback and portfolio guidance.
- Collaboration and Settlement

- Looking forward to working with stakeholders, consideration of feedback etc.
- Key Dates:
 - SAG feedback meeting Oct 1
 - Negotiation #1 with non-financially interested parties Oct 9
 - Final comments on stipulation Dec 16
- Filing
 - Filing complete package by March 1, 2025

Illinois EPA - Inflation Reduction Act (IRA) Home Energy Rebate Programs

John DeRosa, Illinois Environmental Protection Agency (Illinois EPA)

Introduction

- The Illinois EPA Office of Energy supports energy efficiency, resiliency, and clean energy through public partnerships and inter-agency collaborations to reduce the energy burden and improve energy equity in Illinois.
 - Will be working with Department of Commerce and utilizing the Community Action Agencies

Illinois EPA Office of Energy Funding Structure

- Every three years get allocated funding through State energy programs – usually \$2 million. Went up to \$300 million due to IRA and IIJA
- Have a lot of new programs currently in the building phase
- Federal
 - State Energy Program (SEP)
 - New Infrastructure Investment and Jobs Act (IIJA) - \$40 million
 - Energy efficiency programs
 - Waste water drinking
 - Energy code training
 - New Inflation Reduction Act (IRA)
- State
 - Energy Efficiency Trust Fund
 - Low-income housing funds - \$5 million
 - Renewable Energy Trust Fund

IRA Home Energy Rebate Programs - \$260 million in total for a seven-year time period

- Home Energy Efficiency Rebate Program (Section 50121)
 - \$131,952,374 formula allocation for whole-home efficiency improvements based on modeled or measured pathways
 - Income –based rebate amounts with requirements for allocating funds to low-income and multi-family low-income housing
- Home Electrification & Appliance Rebate Program (Section 50122)
 - \$131,452,470 formula allocation for residential electrical upgrades
 - Income-based rebate amounts with requirements for allocating funds to low-income and multi-family low-income housing

Examples under each Rebate Program

- Home Energy Efficiency (Section 50121)
 - Building envelope insulation
 - Window replacement
 - Space heating and cooling equipment retrofit

- Heating and cooling distribution system retrofit
- Domestic hot water equipment
- Lighting upgrades (indoor and/or outdoor)
- High-Efficiency appliance replacement
- Programmable thermostats
- Energy metering changes
- Home Electrification and Appliance (Section 50122)
 - Heat Pump HVAC
 - Heat Pump Water Heater
 - Electric Stove/Cooktop OR Heat Pump Clothes Dryer
 - Breaker Box
 - Electric Wiring
 - Weatherization

Area Median Income (AMI)

- DOE lays out framework for most of the program, prioritizing low-income households
- Low-income considered less than 80% AMI
- Moderate income is 80-150% AMI
- Will be prioritizing low-income at program launch, will take time to build out moderate-income program

Money Available for Households Seeking Rebates

- Per-household rebate limits established by the law and program administrators
- Which technology or technologies are being installed in the home
- Whether the project has estimated energy savings, and how those energy savings are calculated
- The household's income
- The total project cost

Home Energy Efficiency (Section 50121) – Single Family Modeled Savings

- DOE requirements: 20-34% energy savings, can get lesser of 80% off project costs covered or \$4,000
 - Requested that each amount be doubled (\$8,000 to \$16,000). Increased to 100% of funding
 - Submitting comments back to DOE tomorrow
 - Requested for 35% or greater energy savings, can get up to \$16,000

Home Energy Efficiency (Section 50121) – MF Modeled Savings

- MF in IRA is two or more units
- Have caps on funding for buildings. Opportunity to braid funds with utility programs
- Asked DOE to double rebates for MF as well

Home Electrification and Appliance Rebates (Section 50122)

- Included all qualified products
- Can get up to \$8,000 for a heat pump if meet low-income requirement
- A lot of interest in electric load service and electric wiring, as other programs running into trouble with this

Home Electrification and Appliance Rebates (Section 50122) – Eligibility Requirements

- If costs for the project go over the amount of funds, we are hoping to braid with other funds
- Will have to include moderate-level later on in the program
- Low-moderate income (LMI) households with less than 80% AMI are eligible for 100% of qualified project costs
- LMI households with 80-150% AMI are eligible for 50% of qualified project costs

Question: Is there room for flexibility for asking for a higher rebate amount for the HEAR qualified products?

- *John DeRosa: No.*

Karen Lusson: For braiding in Illinois, if you're leveraging with existing IHWAP funds, households wouldn't have to pay anything as all utility programs are zero cost.

- *John DeRosa: There should not be a situation where there's a gap.*

Annette Beitel: How do we avoid having a low-income customer having out of pocket costs that they can't afford?

- *John DeRosa: It'll be set up through the community action agencies.*
- *Annette Beitel: Have you thought about working with CBOs and paying them to help out?*
- *John DeRosa: Yes, thinking about that.*

Chris Neme: Do you have clarity on what would be required to be modeled to be eligible for IRA dollars? Is there a modeling software that CAAs will have to be up to date on?

- *John DeRosa: Will be prioritizing multifamily with HEAR and HOMES programs working together. Current weatherization software meets requirement for IRA for MF. For single family, have to use DOE BPI-2400 modeling software. Has to be submitted to DOE for approval.*
- *Chris Neme: Many CAAs don't do multifamily. I'm concerned about role of CAAs and their ability to use the new technology. One idea is that utilities provide training to CAAs on technology.*
- *John DeRosa: We've applied for an energy auditor training grant, specifically for MF energy auditors. Goal of that is to have 15 new energy auditors placed throughout the state. We're also exploring ways to have energy auditors for MF that could benefit from the revolving loan from program and meet requirements there, and act as overflow for IRA. Just started those convos with IFA and DCEO this week. We keep hearing concerns about modeling software*

Heidi Gorrill: How are the utilities and the IL EPA thinking about the customer experience? There's a concern around number of applications, verification requirements and complex experience.

- *John DeRosa: DOE has a new software system called iWIG that came out earlier this year. There is a pre-application process and then it goes to full application. It will have to go through the system to ensure energy audit is BPI-400. Not sure at what level the utility MF family audits are at. The requirements from DOE are extensive.*

Annette Beitel: CAA uses the tool WeatherWorks. Have you looked at the agencies that do a few MF, but a lot of single family? Also concerned around modeling tool for single family.

- *John DeRosa: The IRA law set another standard outside of that. Even though WeatherWorks is DOE approved, it does not meet single family requirements.*

Karen Lusson: How do we make this braiding and leveraging of funds successful given the utility dollars so that the utilities can be a part of this and not just the CAAs? This is an opportunity to braid. Also, how are you looking to spend the dollars throughout the years?

- *John DeRosa: For spending dollars throughout the years, there are different tranches we have to meet at certain year points to open up the next amount of funding. However, we haven't set anything annually. We're getting to the part where we are starting to plan with DCEO.*
- *Pat Justis: We held a utility meeting recently and will continue to have this dialogue. We recognize the challenges that EPA and DCEO have to find an efficient way to effectively spend this money.*
- *John DeRosa: This is a challenge with other states as well. The DOE requirements are our biggest challenge. Also, we applied for early admin funding in May which gave \$2.5 million for each program so we can jumpstart by a few months to build new rules into iWIG system. Haven't had the chance to test out something in the field yet.*

Karen Lusson: Hearing the utilities timeline and that they have to file their plans on March 1, 2025, when do you expect final program rollout approval from DOE?

- *John DeRosa: DOE wants the funds allocated for 2024, as 2025 is uncertain. We submitted applications in July and August. Once applications are approved, funding is allocated to us. Hopefully by mid-2025.*

Jim O'Shaughnessy (via chat): We have a cohort of multi-family properties that are part of our program [100 units +]. In ComEd service territory. Would like to share this info? Can someone contact me so I can get some additional info?

- *SAG Facilitator will follow-up.*

Mike King (via chat): We will work with IL EPA and DCEO in any way possible and will journey map the process. Our shared goal is to make this process seamless for the customer. We are engaged and have offered John and his team full access to our resources.

Annette Beitel: CAAs are extremely strapped for expense, so they need admin costs.

- *John DeRosa: Most of the admin funds are going to the CAA's. I do not know what percentage is going to CAA, but majority of funds are going to CAA. How funding gets allocated for CAAs could be performance based—may get initial allocation, but money will go towards where the work is done and where the demand is. TBD though.*

Annette Beitel: A discussion is needed about capacity building and training agencies on a new tool. It has also been challenging for CAAs to hire new staff who are knowledgeable in certain electrification technologies. Many rely on external contractors to do the work. Also suggest there be a contingency plan – such as asking utilities to do some of the work while CAAs are ramping up.

- *Chris Neme: Utilities could hire people themselves who are familiar with modeling software to work with CAAs.*
- *Suggestion to consider two independent software entities – SnuggPro and Optimiser – who DOE approved to help with modeling training.: <https://www.energy.gov/scep/single-family-modeling-solutions-home-efficiency-rebates-program>*

- *John DeRosa: We have the capacity to hire one more person. May have to braid state funds for health and safety and hire someone for that.*

Cheryl Watson (via chat): Are new senior apartment building non low income a fit for electrification?

- *Celia Johnson: Additional details of the IRA program are still being worked out.*

Karen Lusson: When do you see rebates starting to go out the door into buildings and homes?

- *John DeRosa: By the start of the next fiscal year – July 1, 2025, we hope to have something launched for low income multifamily. May have to start with pilots to make sure that everything is working and connects correctly with utilities and CAAs.*

Karen Lusson: Have the utilities heard about the updated BPI modeling software requirement? These conversations seem critical.

- *Pat Justis: Looking forward to continuing conversations with IL EPA about this. Modeling software is one issue of many.*
- *John DeRosa: We have had several meetings with utilities. Getting utility data access will be important.*
- *Heidi Gorrill: IL EPA needs to engage with the utilities now so that funding can be made available.*
- *Mike King (via chat): We are having a follow up meeting with IL EPA and DCEO to discuss data along with potential pilots.*

Seth Craigo-Snell (via chat): I am curious whether IL EPA has had any internal conversations about whether there would be allocations or a prioritization for the individual measures in the HEAR Program or will you just allow the market to present its opportunities each year until the funding is depleted?

- *Follow up needed.*

Cherly Watson: Energy auditors – are you thinking about energy coaches who are more boots on the ground to help people look at specific homes and what to think about in planning their transition? There's some grassroots training that has already started, and even that is overwhelming.

- *John DeRosa: There has been some discussion on the education and outreach component of this. A plan needs to be developed.*
- *Ben Dueweke (via chat): Check out the City of Ann Arbor's "Home Energy Advisor" program - it was designed to be support people navigating their way through all these different programs: <https://a2zerohea.org/>*

Julia Friedman: Are there digital tools that IL EPA is thinking of to support households?

John DeRosa: The state is discussing that. The different IL Power Agencies, IL Finance Authority, etc. It's coming but might take a while to get a tool deployed.

Funding Allocation for Home Efficiency Rebates – Illinois

- HOMES Allocation: \$131,952,374
- Min Allocation for Low-Income HH: \$42,698,586
- Min 10% Low-Income MF Allocation: \$10,556,190
- Max Open Efficiency Rebate Allocation: \$52,307,124

Funding Allocation for Home Efficiency Rebates

- HEAR Allocation: \$131,452,470
- Min Allocation for Low-Income HH: \$42,536,821
- Min 10% Low-Income MF Allocation: \$10,516,198
- Max Open Efficiency Rebate Allocation: \$52,108,957

State Implementation Blueprint

- Focus will be on building out structure of the program in the next 3-6 months.
- Community Benefits Plan
- Education and Outreach Strategy
- Consumer Protection Plan
- Utility Data Access Plan
- Privacy and Security Risk Assessment for State Systems
- Market Transformation Plan (1 year after award date)

Ongoing Discussions

- Utilities, Electrical Cooperatives and Municipal Utilities.
 - How IRA rebate programs will integrate with existing EE programs
 - Make sure rebates are available for entire state
 - Working with co-ops and municipalities
- Illinois Department of Commerce and Economic Opportunity
 - How can we integrate with existing EE/weatherization programs?
 - IRA Home Energy Efficiency Contractor Training Program
 - Have \$5 million applied for training for IRA workforce development. Focused around three CEJA hubs for all types of contractors
 -
 - Energy Auditor Training Application
 - Applied for \$2million, focused on mf energy auditors for IL.
- Illinois Finance Authority
 - Create access to capital for small businesses
 - What are best ways for states to use funds...energy efficiency -> electrify home -> solar?
- Climate Pollution Reduction Grant
 - Came through IL EPA – will be more on commercial EE.
 - Making sure we are filling gaps and not overlapping with IRA programs.

Timelines

- Federal
 - July 2023 – U.S. DOE guidance released
 - October 2023 - U.S. DOE released updated guidance
 - August 2024 – State to notify U.S. DOE of Intent
 - January 2025 – State applications due
- Illinois
 - July 2023 – Appropriations received
 - May 2024 – State submitted early admin
 - July/Aug 2024 – Applications submitted
 - Oct-Dec 2024: Conduct public input sessions. Unsure of how many will be doing.
 - First Half 2025 – Implementation blueprint completed and rebates available

Additional Information

- Visit: <https://epa.illinois.gov/topics/energy.html>
- Questions: IL EPA Office of Energy: EPA.Energy@Illinois.gov

Closing and Next Steps

Ameren Illinois 2026-2029 Draft EE Plan

- Notify SAG Facilitator **by Thursday, September 19** if you plan to present feedback on Ameren's draft EE Plan (Celia@CeliaJohnsonConsulting.com)
- Next Steps for Ameren Illinois:
 - **Tuesday, October 1 (teleconference from 9:30 – 12:30):** Large Group SAG meeting for interested stakeholders to present feedback on Ameren's draft EE Plan
 - Negotiation meetings with Ameren Illinois and non-financially interested stakeholders **begin on October 9**

Follow-up items from Ameren Illinois Presentation:

1. Ameren Illinois to follow-up with ICC Staff on Voltage Optimization.
2. Ameren Illinois will share additional information on electrification opportunity for propane customers.
3. IL Attorney General's Office requested portfolio level costs for Ameren's current EE Plan, compared to portfolio level costs proposed in the 2026-2029 EE Plan.
4. Zach Ross will follow-up with Annette Beitel on evaluation, including how the budget is split historically between process and impact evaluations.

Follow-up items from Illinois EPA Presentation:

1. SCS Analytics question: Has IL EPA had any internal conversations about whether there would be allocations or a prioritization for the individual measures in the HEAR Program or will you just allow the market to present its opportunities each year until the funding is depleted?
2. SAG Facilitator will track the status of Inflation Reduction Act funding and schedule an update at SAG, as needed.